Transforming Education
Kettle Moraine School District

Progress Report — April 2011

Prepared by Laura Lefkowits
President, Lefkowits Consulting
7665 E. Fourth Avenue, Denver, CO 80230
laura@lefkowitsconsulting.com
Executive Summary

In 2005, the Kettle Moraine School District (KMSD) faced daunting fiscal challenges. Anticipating a future economic climate in which this condition would persist, the forward-thinking board of education directed administration not only to balance the annual budget but also to address the question, *how will KMSD transform the educational delivery system to better and more efficiently meet the needs of all students?*

In response, the district launched a scenario planning process that continues today. The scenario framework developed in 2006 was formed by crossing the following two “critical uncertainties” on a Cartesian plane: 1) will the U.S. global economic position improve or decline; and 2) will the KMSD community’s response to change be proactive or inactive. The resulting four quadrants describe different possible future realities, or "scenarios,” in which: 1) the U.S. global economic position is improving and KM’s willingness to change is proactive; 2) the U.S. global economic position is declining and KM’s willingness to change is proactive; 3) the U.S. global economic position is improving and KM’s willingness to change is inactive; and 4) the U.S. global economic position is declining and KM’s willingness to change is inactive. Rigorous analysis of the implications of these scenarios for KMSD and generation of possible responses to each formed the foundation for the development of four strategic recommendations:

1) develop leadership
2) create partnerships
3) access 21st century communications
4) foster research and development.

The district has been actively engaged in implementing these recommendations since the 2007-2008 school year. During the 2010-2011 school year, a process of reflection and review of the status of the scenarios and implementation of the recommendations was conducted. This Progress Report provides background on the scenario planning process and its outcomes, summarizes input and advice provided by stakeholders at a community forum held in February 2011, and offers guidance for continuing the transformation effort in KMSD.

The reflection process resulted in agreement among stakeholders that the critical uncertainties used to develop the scenario framework re-
main relevant in 2011 and that the scenario describing a world in which the U.S. global economic position is declining and KM’s willingness to change is proactive, “The Lemonade Stand – From Sweet to Sour,” appears to most closely match current reality. Stakeholders continue to support the four recommendations, with some suggested enhancements, as the best pathway to transformation. The process made it clear that a vision of what a transformed KMSD will look like is emerging and there is a strong core of stakeholders deeply invested in the transformation effort.

In order to continue the transformation effort over the next 5 years, stakeholders advise district leaders to:

1) promote innovative approaches to teaching and learning
2) pace the change to maintain momentum while at the same time making it safe for more people to get on board
3) implement a more aggressive and comprehensive communications plan
4) keep the focus on what is best for students
5) expand the reach of the effort regionally and nationally and also address the many funding and policy barriers to change
6) augment the district’s research and development work
7) clarify the vision of transformation.

The report describes research on the adoption of innovations by sociologist Everett Rogers to show the link between the stages of the adoption process (knowledge; persuasion; decision; implementation; and confirmation); categories of adopters (innovator; early adopter; early majority; late majority; and laggards); and the ongoing transformation effort in KMSD. This research suggests that transformation of KMSD will succeed only when the majority of the community has completed the five stages of adoption. It is recommended that, in addition to attending to the critical advice offered by stakeholders, the district utilize the social networks of its innovators and early adopters in order to encourage others to accept transformation; create more demand for change by increasing the knowledge of the community about the challenges of an uncertain future; and develop a shared vision among all stakeholders of what a transformed KMSD may look like.

KMSD will continue to benefit from its forward-thinking board of education, its capable and creative central administration and staff, and its engaged community dedicated to the success of every KMSD student. District leaders well understand the need to continually and thoughtfully

anticipate the future. By doing so, they, along with the entire community, will ensure that KMSD is the “best that it can be” today and in the future.

INTRODUCTION

In 2005, the Kettle Moraine School District (KMSD), like many districts across the country, faced daunting fiscal challenges. With reductions in state and local funding and growing demands for higher performance from local, state, and national stakeholders, the district needed to do more with less. Rather than focus solely on cutting expenses to solve the annual budget crisis, the district’s forward-thinking board of education sought a different approach. Anticipating a future economic climate of persistent fiscal challenges, the board directed administration not only to balance the annual budget but also to address the question, how will KMSD transform the educational delivery system to better and more efficiently meet the needs of all students? This directive served as the launching pad for a unique and dynamic planning process that continues in 2011.

The district embarked on a transformation journey utilizing a process called scenario planning. Scenario planning, unlike traditional strategic planning processes, asks the question, what might the world look like a decade or more from now and are we prepared to meet our mission in a dramatically different environment? Using a structured, facilitated approach, a team of KMSD stakeholders including board members, administrators, teachers, parents, students, and community members explored data about trends of the future in multiple domains (e.g., demographics, technology, economics, globalization); identified critical uncertainties from the data for the future of KMSD; developed narratives, or scenarios, of multiple, plausible future realities; analyzed the implications of those realities for KMSD; and developed options for action today that would promote success tomorrow. The team, known as the Transformation Task Force (TTF), worked intensively through the 2006-2007 school year to produce a set of scenarios and recommendations documented in the report, “Transforming Education in Kettle Moraine: Recommendations for meeting the needs of all learners.” (See http://www2.kmsd.edu/ttf/). This report and an accompanying set of power points and videos were presented at a community forum on May 15, 2007. In subsequent years, KMSD implemented recommendations and monitored the external environment to determine which of the four scenarios most closely matched the reality of the present.
In 2010, five years after the initial transformation work had begun, Superintendent Pat Deklotz initiated a reflection process designed to assess progress made and to develop guidance for continuing the transformation effort. The TTF reconvened in October 2010 to review a Status Report on the four scenarios and the implementation of recommendations and to prepare for a community-wide forum to be held in February 2011. The Status Report and a report summarizing the TTF meeting can be found at http://www2.kmsd.edu/ttf/.

This Progress Report provides background on the scenario planning process and its outcomes, summarizes the input and advice provided at the February 2011 community forum, and offers guidance for continuing the transformation effort in KMSD.

**BACKGROUND**

The scenario framework that formed the foundation of the planning process is displayed in Figure 1 below. The framework is formed by crossing two “critical uncertainties” on a Cartesian plane. The resulting quadrants provide the foundation for describing four unique future realities that could face the district in 2016.

**Figure 1. KMSD Scenario Framework**
The two “critical uncertainties” chosen by the TTF address the following key questions:

1. *In the future, will the U.S. global economic position improve or will it decline?* In 2006, when the scenario framework was developed, members of the TTF had grave concerns about the future of America’s economy, especially in light of the growing competition from countries such as China and India. Increased globalization of markets appeared to be placing new demands on educators to ensure that all students would be prepared to survive and thrive in the global economy. The pace of change in the economy was uncertain, however, and the extent to which the U.S. would gain or lose economic dominance in the future would have varying implications for teaching and learning in KMSD.

2. *In the future, will the Kettle Moraine community show a proactive willingness to change, or will it resist change and be inactive?* The TTF believed that change would undoubtedly come to KMSD but the future success of the district would depend in large part on the extent to which the community embraced this reality. A community that was highly resistant to change might slow down the transformation process and avoid facing new challenges head-on. A more proactive community would have the opportunity to address challenges before they became overwhelming or forced the district into obsolescence.

When crossed on a Cartesian plane, these two critical uncertainties formed four different worlds in which: 1) the U.S. economic position declined and the KMSD community approached change in a proactive fashion (“The Lemonade Stand – From Sweet to Sour”); 2) the U.S. economic position improved and the KMSD community approached change in a proactive fashion (“W.I.S.H. and O.I.L. Become KM Gold”); 3) the U.S. economic position declined and the KMSD community took an inactive approach to change (“A Perfect Storm”); and 4) the U.S. global economic position improved and the KMSD community took an inactive approach to change (“Disney-school.com”). These four unique but plausible scenarios provided the platform for analysis of implications and development of a set of recommendations for transformation.
Through the scenario planning process, the TTF gained a new perspective on the district, viewing it as a complex system that would be best equipped to meet the challenges of the future by moving from a “command-and-control” structure for decision-making to a more collaborative, “adaptive,” approach to solving difficult challenges. As a result, four broad recommendations were made:

1. **Develop Leadership** at all levels of the system in order to encourage independent initiative for change.  
2. **Create Partnerships** that are mutually beneficial to the district and the partner and that advance transformation.  
3. **Access 21st Century Communications** in order to ensure that all stakeholders have the opportunity to understand and contribute to the ongoing transformation process.  
4. **Foster Research and Development** to improve the quality and relevance of the teaching and learning process in order to prepare students to succeed in a global economy.

As described in the Status Report, and as confirmed by the TTF in its October 2010 meeting, present reality appears to most closely match the scenario, “The Lemonade Stand – From Sweet to Sour” (declining economic position and proactive response to change). The TTF agreed that the district has made good progress toward implementation of the recommendations and the two critical uncertainties forming the scenario framework remain important and uncertain. The next step in the reflection process was to host a community-wide forum with the following objectives for participants:

1. Learn about the history and progress made by the Transformation Task Force since 2006.  
2. Learn about a new initiative in support of the transformation effort, the Next Generation Learning Project.  
3. Provide advice to district leaders as they chart the course for transformation over the next 5 years.

Approximately 75 stakeholders, including administrators, teachers, students, parents, and community members, addressed these objectives in a day-long workshop on February 26, 2011.
SUMMARY OF FORUM AND PARTICIPANT INPUT

To ensure a shared understanding of the work to date, the forum began with an overview of the scenario planning and transformation process. This was followed by a presentation by Jim Rickabaugh, Ph.D., Director of The Institute at Wisconsin’s Cooperative Educational Service Agency (CESA) #1 on the Next Generation Learning project, a national education transformation initiative in which KMSD participates. (See http://www.cesa1.k12.wi.us/institute/partners/ NxGL_lab.cfm for complete presentation.) Participants were asked to respond to both presentations in small groups. Following lunch, participants engaged in a “World Café” process in which they addressed three critical questions: 1) how can the four recommendations of the TTF be enhanced to support transformation over the next five years; 2) why does Kettle Moraine’s willingness to change continue to be a critical uncertainty for the future; and 3) what does a “transformed” KMSD look like? Finally, the group was asked to provide individual guidance to district leaders on how to continue the transformation effort. Responses from participants are summarized below.

Response to Scenario Framework

Participants were asked to reflect on the critical uncertainties in the scenario framework and to offer any additional uncertainties that should be considered as the planning process continues. Participants confirmed that the two critical uncertainties in the current framework are still relevant and also provided some additional uncertainties that should be kept in mind as outlined below.

1. **Teachers** – will they be effective (engaged, intuitive, knowing the child, willing to innovate and change), or will they be ineffective (apathetic, task-oriented, poor communicators, with contempt for change and innovation) and will we be able to recruit effective teachers?

2. **Tools** – will students have the tools they need for learning or will lack of understanding by teachers, or lack of resources, stand in the way?

3. **Diversity** – will we manage expected changes in the demographics of the student population well or poorly?
4. **Accountability** – what will it look like?
5. **Definition of student success** – who will define this and how?
6. **Child development** – will schools take an active or inactive role in the social, emotional, and physical wellness of students?
7. **Value of public education** – will the public value and prioritize public education or will economic and other pressures reduce its value in the public mind?
8. **Funding for education** – will we have adequate or inadequate funds to meet the needs?
9. **Artificial intelligence** – what will be the impact of AI on teaching and learning?

**Connections with Next Generation Learning**

KMSD’s participation in the “Next Generation Learning” (NxGL) project exemplifies its growing stature in the region and nationally as a progressive, innovative district. The goal of NxGL - to develop comprehensive, sustainable systems of personalized learning for all students – aligns well with the transformation work in KMSD, especially the focus on fostering research and development. NxGL uses a rapid prototyping method to develop and test new approaches to teaching and learning that provide:

- Rigorous, integrated world class learning standards
- Competency-based progress
- Anytime/everywhere learning
- Progress-based grouping
- Blended instruction using technology
- Authentic comprehensive assessments

Forum participants cited the new balanced assessment program, the launch of charter schools, and improvements in district-wide communications as evidence of linkages with the project. They also noted that the district could do more to personalize learning by moving toward progress-based, rather than age-based,
classrooms; increasing the relevance of the learning process by better linking with higher education and the business community; and encouraging those who might be resistant to change to “get on board.”

Enhancements to the Recommendations

Participants discussed the four recommendations provided by the TTF in its original report and provided the following ideas for enhancing these to ensure the continuation of the transformation effort.

1. Develop Leadership
   a. Provide more support to those who assume either formal or informal leadership roles including “moral” support for those who take risks and promote change.
   b. Create a “Leadership Academy” that accesses community resources and promotes linkages with the community.
   c. Expand the definition of “leadership” to include collaboration, problem solving, and team effort.
   d. Expect students and parents to be leaders as well and provide training to support their development.
   e. Provide professional development that will help individuals understand and utilize their unique leadership styles to support transformation.

2. Create Partnerships
   a. Seek out partners that can provide internship opportunities for students.
   b. Partner with teacher-preparation institutions and consider establishing a Lab School for teacher training.
   c. Partner with post-secondary institutions, including four-year, two-year, and technical/career schools.
   d. Ensure that all partnerships are meaningful and mutually-beneficial.
   e. Seek out national and international partners as well as local.

3. Access 21st Century Communications
   a. Continue the good work that has already occurred to provide more access and communication.
   b. Provide professional development to teachers and other staff to ensure that they are fully utilizing the tools provided.
c. Use students as teachers of technology. Understand that there is a difference between using technology for communication and using it for learning. Do not allow technology to fully replace face-to-face exchanges between teacher and student. On the other hand, do use technology to offer more personalized learning options for students.

d. Ensure transparency throughout the change process. Allow “choice and voice” for stakeholders.

4. Foster Research and Development

a. Encourage students to participate in R&D projects.
b. Add more charter school options focused on engineering, trades, STEM, health and wellness, or career-readiness.
c. Ensure that surveys allow respondents to adequately and accurately express themselves.
d. Be transparent about survey results and how they are used.
e. Evaluate new initiatives and make modifications as needed.

Kettle Moraine’s Willingness to Change

Participants agreed that the willingness of the community to change remained a critical uncertainty for the future and offered a number of reasons for this as well as ideas about how to encourage a more proactive response to change as summarized below.

1. Create demand for change. The district needs to do more to “create demand for change.” Some parents may not fully understand the trend information that much of the work is based upon. Many are complacent because KMSD is a high-achieving district. Others fear change because they cannot picture what a transformed district will look like and where they fit in. These issues need to be addressed directly through education, public forums, online resources, etc. Proactive efforts to bring people into the conversation (especially resisters) should be implemented so that questions about the district’s direction and vision of the future can be outlined.

2. Make transformation visible. Transformation is hard to see and feel. Fear of change often occurs because people are not convinced that the unknown will be better than the known. The district should create multiple opportunities and
modalities to inform the community about the changes taking place, the reasons for them, and their results in order to promote the “reality” of change.

3. **Reach consensus on the purpose of education.** There are differences of opinion in the community about what it means to be well-educated. Support for transformation depends upon developing a shared understanding of the desired outcomes of schooling.

4. **Provide unified and consistent messages from staff.** It is critical that staff provide consistent and unified messages to stakeholders about the transformation process. This means that they must fully understand the work and buy into it as well.

5. **Reassure stakeholders regarding leadership.** Stakeholders need to be reassured that the transformation effort does not depend solely upon the individuals currently in positions of authority remaining in place. There is some concern that turnover of leadership (board or central administration) could derail the process. This concern could prevent people from fully accepting transformation.

6. **Acknowledge concerns about the economy.** The current economic climate may promote resistance to change. As parents struggle to pay their mortgages and put food on the table, they may view “transformation” as an unnecessary distraction in their already overburdened lives. Sensitivity to this reality, as well as patience through the change process, is required.

**A Transformed KMSD**

Participants worked in groups to develop ideas in response to the question, what does a transformed KMSD look like? Many ideas and significant enthusiasm were generated and recorded. The ideas are categorized into themes and summarized below.

1. **Time and Place.** The district motto, “learning without boundaries,” came alive in this discussion as participants
imagined year-round schools, in which technology maximizes opportunity and personalization of learning within and outside of school walls. Internships for high school students increase the relevance and usefulness of the educational process and access to a variety of learning environments “improve the interface between school and life.” An alternative calendar opens opportunities for better utilization of community resources.

2. **Student Engagement.** In a transformed district, students are excited about and take responsibility for their own learning. They are allowed to focus on their passions with instruction geared to their interests, learning styles, and desired career pathways. Students demonstrate a strong work ethic, are leaders, and are deeply involved in the community.

3. **Teaching and Learning.** Transformation involves changes in the teaching and learning process itself. Teachers serve as facilitators and coaches, learning targets are less about content than about how to learn, and curriculum is delivered with a project-based approach. Technology “leads the way” but there continues to be a strong “human element” in instruction, with opportunities for both online and face-to-face learning. Students are grouped based on their progress, not their age, and education is seamless from birth through higher education and career preparation. Education is highly relevant to future careers and preparation for a 4-year college is not the only goal. Critical thinking is valued and measured. In short, transformation results in a “system of learning that is not like anything we have seen before.”

4. **Community Involvement.** In a transformed system, not only are community members, including parents, involved, they are an integral part of the learning process. There is “respectful recognition of different perspectives” among stakeholders and these differences are valued and utilized to enhance learning. Although diverse, the community is cohesive regarding its shared responsibility for achieving positive outcomes for students. Partnerships between the district and community organizations are authentic and meaningful. There are no barriers to communicating across and among all stakeholder groups such that spontaneous forums like the “World Café” emerge as a
way to solve difficult challenges. Courage and trust abound.

5. **Purpose of Education.** Transformation requires reaching agreement on the purpose of education. Differences of opinion among stakeholders about what it means to be well-educated in the 21st century currently prevent unified movement toward change. In a transformed system, the community agrees on outcomes, shares a common vision of the future, and moves forward corroboratively to reach its goals.

Advice to District Leaders

At the conclusion of the workshop, participants were asked to record on post-it paper their “one best piece of advice” to district leaders as they chart the course for transformation over the next five years. Many people reiterated points they had made in previous small group discussions and many offered more than one piece of advice. Every idea offered has been categorized into a set of seven themes and documented in Appendix A. The ideas were innovative and thoughtful and deserve a full reading. A summary of the key points within each theme and a set of representative comments is provided below.

1. **Promote innovative approaches to teaching and learning.** The largest number of ideas was offered in the area of teaching and learning. Ideas focused on increasing personalization of learning, decreasing the current boundaries of time and place, and ensuring relevance of the learning process. Representative ideas included:
   a. “Make it possible for high schoolers to explore careers during the school day, as a course, outside of the high school walls.”
   b. “Develop tools and approaches to afford each KM student the opportunity to succeed whatever their attitudes and interests.”
   c. “Year-round school with workshop learning for teachers and students during interim times.”
   d. “Continue to encourage charter schools at all levels of the district.”
   e. “Rethink role of teacher – facilitator of learning not lecturer of subject.”
   f. “Learning should be a 24/7/365 event that the school
and teachers can facilitate.”

g. “If the end goal is the ‘real world’ then . . . bring in outside resources. For example, bring in the Medical College to show what research is like.”

h. “Relevance is key – make sure students are learning things absolutely necessary.”

i. “Encourage risk taking to try new teaching delivery methods.”

2. **Pace the change.** Participants evidenced a sound understanding of the difficulties associated with the change process while at the same time they encouraged district leaders to “stay the course.” The comments below are representative:

a. “Transformation is not a destiny, it is a journey. The stakeholders need to understand that change in design is inevitable.”

b. “Nail the change management aspect of the transformation. Thoughtfully assess your audiences and how to communicate with and through them to ensure understanding and shared expectations.”

c. “I think you should take into account that transformation can’t wait. It can’t be a slow process. Communication/engagement during transformation is critical, but I would err on the side of a speedier transformation.”

d. “You can’t please everyone so do what you think is right.”

e. “Begin the change now! Don’t wait for buy in! You will get it as students, teachers, administrators, parents all turn over and they only know the new way!”

f. “Concentrate on one or two initiatives at a time, so as to be able to devote enough time, energy and resources as necessary. Then move on to other initiatives. Do a few things well, rather than several things at a less than desired level. But do them all in the long run!”

3. **Implement a comprehensive communications plan.** The importance of effectively communicating with stakeholders was emphasized again and again by participants. It was noted that the community needs information to be repeated
frequently and to be provided in multiple formats. Representative comments included:

a. “Develop a plan on how to communicate to parents and community what a ‘transformed’ KMSD will look like and why transformation is necessary. Build ownership of plan.”

b. “Continue to host intentional conversations throughout the district in a variety of venues. Have one or two critical questions leading the conversations, such as, what does a transformed KMSD look like, or what is our greatest fear?”

c. “Use the word transformation more in communications.”

d. “Communication is key – when change meets the uninformed, the message can be lost.”

4. **Focus on Students.** Many participants encouraged the district to maintain a focus on what is best for students. This includes soliciting the input of students and also ensuring that any changes made are for their ultimate benefit. Representative comments included:

a. “Collect information and ideas from students. Perhaps hold a forum like this for middle school and high school students. You’d be amazed at what forward thinkers they are.”

b. “Be ‘customer-led.’ In other words, consider the transformation through the needs and wants of the kids you serve.”

c. “Find ways to gather data from students who are out of school, i.e. what are your biggest gaps, best preparation? What did you need to know but didn’t have the chance to learn?”

d. “District leaders must continue to seek input from our current KM high school students. What an inspiring group to have at an event like this!”

5. **Expand reach; reduce limitations.** Participants offered encouragement to district leaders to reach out more aggressively to the KM community and beyond in its transformation work. They also acknowledged various limitations faced by the district in terms of finances and policy restrictions and made suggestions in that regard. Representative comments included:
a. “Partner with other districts so that we can move through this together and not just transform education at KM but in Wisconsin and beyond.”
b. “Seek huge funding sources that would create autonomy and freedom from mandates that hold us in traditional systems.”
c. “Need to get the traditional governing rules changed to allow flexibility to change. Example – get a mandate from voters to get state and federal rules changed.”

6. **Augment Research and Development.** There was significant interest expressed among participants in expanding the district’s research and development effort. This ranged from exploring new instructional methods for personalizing learning to evaluating the impact of various initiatives. Representative ideas included:
   a. “As you move forward into the field of innovation, engage your professional staff in action research so that there is a ‘disciplined’ protocol around the innovations that could be used as ‘data’ for the community to review.”
   b. “With each possible systemic change, understand the evidence-based reason of why the change is better than the status quo.”
   c. “Put in place a research and development team – they have a lot of work coming their way!”

7. **Clarify the Vision.** Participants encouraged district leaders to work to gain a common vision of transformation across the community. Lack of agreement on the desired outcomes of the educational process could be standing in the way of full acceptance of the transformation effort. Representative comments included:
   a. “In order to transform, we need a clear, agreed-upon vision. It begins by defining the skills, knowledge and attitudes – the standards expected of each child.”
   b. “We are constantly making comparisons to other countries based on standards that have been around for years. Instead of trying to reach one expectation of being better than the next, strive for improving beyond that. The best KMSD can be.”
DISCUSSION

In his seminal work from 1962 on the adoption of innovations\textsuperscript{2}, sociologist Everett Rogers (1931-2004), described the process by which a new idea, or innovation, becomes accepted by society. According to Rogers, it matters little whether the initiative at hand is truly new, as in never having been known or implemented before. What matters is the perception of newness by those undergoing adoption. This is another way of saying, one person’s innovation is another’s old-hat. For example, those of us in developed countries have known for centuries that boiling water can kill bacteria and increase its safety for consumption. This concept was unknown to certain Peruvian villagers in the 1950’s, however, and persuading them to adopt the “innovation” of boiling unsafe water before drinking it proved to be almost impossible. Thus, the extent to which an idea is perceived as new, different, and opposed to prevailing norms will affect its rate of diffusion throughout society at large.

According to Rogers there are five distinct stages in the adoption process: 1) knowledge; 2) persuasion; 3) decision; 4) implementation; and 5) confirmation. Adopters will always journey through these five stages, but the rate at which they do so will vary depending on a number of factors.

Confronted with a new idea, most people will ask: 1) what is it; 2) how does it work; and 3) why should I care? As adopters explore these questions in the knowledge stage, the extent of their prior knowledge of the innovation or something similar, their general intelligence and openness to new ideas, and the complexity and “newness” of the innovation itself will impact the speed at which they gain the necessary knowledge for adoption.

In the persuasion stage, people analyze the innovation in terms of a number of factors including:

1. Relative advantage: Will I be better off if I adopt the new idea than if I keep doing what I’m doing now?

2. Compatibility: Is the new idea aligned with my beliefs and values or will I have to change those?

3. Complexity: Can I understand the nature of the innovation well enough in the ways it is communicated to me to form an opinion about it?

4. Trialability: Will I have an opportunity to try out the innovation before I have to fully commit?

5. Observability: Is there an opportunity to observe others implementing the innovation?

The decision stage occurs when the adopter, having performed the analysis above, forms a favorable, or unfavorable, attitude toward the innovation. Some people may be able to consider the idea in a purely theoretical way and reach a decision. Others may need to actually experience the innovation before reaching a conclusion. Still others may be satisfied to take the word of someone they trust that the innovation is a good idea. Rogers emphasizes that those considered trustworthy may not be those in positional authority who are advocating for the change. Others in the community who have informal authority may provide the most convincing arguments on behalf of change.

Once persuaded to assume a favorable attitude toward the innovation, adopters must put the innovation to use. In many cases this will require them to abandon previous practices. Even though the adopter has a positive attitude toward the change, considerable uncertainty about it persists. Only through actually using the innovation can the adoption process continue. Multiple problems may emerge at this stage, especially if implementation is difficult, or if the expected consequences of implementation do not emerge. The adopter is in a fairly tenuous position at this point. Failed implementation can lead to rejection of the innovation.

Finally, if the implementation stage is successful, the adopter actively works to stabilize the change through the confirmation stage. Any opposition to the innovation creates dissonance in the adopter. In order to reduce this dissonance, the adopter becomes a champion of the idea, actively seeking out external support for the innovation and rejecting any criticisms.

In addition to describing the way in which individuals adopt new ideas, Rogers offers a model to describe the way in which entire
societies adopt new ideas. When adoption by whole organizations or communities is required for an innovation to succeed, Rogers proposes that there are five categories of adopters at play, each of whom must traverse the five-stage adoption process: 1) innovator; 2) early adopter; 3) early majority; 4) late majority; and 5) laggards. The innovators constitute the smallest group (about 2.5 percent of the whole). These “venturesome” individuals are able to accept a new idea without trial and they are the first to share the idea beyond its originators. Innovators, however, are not necessarily effective at spreading the idea because their social networks tend to be small. For an innovation to take hold, the early adopters (13.5 percent) must get involved. This group is better connected and respected socially than the innovators and its members are those whom others will “check with” before seriously considering a new idea. Adoption by the early adopters decreases the uncertainty of a new idea and sets the stage for others to enter the adoption process.

The early majority (34 percent) are those with strong social networks but without strong opinion leadership in the community. Compared to the innovators and early adopters, they are more deliberative, requiring greater experience and more time with a new innovation in order to adopt. And yet, once this group is on board, the adoption cycle becomes nearly unstoppable.

Graphing the five categories as a normal distribution, Rogers shows that the peak of the bell curve on the adoption cycle occurs following adoption by the early majority after which, complete social adoption is, in effect, “all downhill from here.” The skeptical late majority (also 34 percent) adopt because most others have already done so and the change is more visible and appears to be inevitable. Finally, the traditional laggards – those with limited social systems and no real influence – latch on, or, even if they do not, their lack of adoption is irrelevant to the success of the process. It is important to note that, although individuals generally tend to fall into one of these categories consistently, depending on the nature of the particular innovation they may fall into an earlier or later category along the continuum from innovator to laggard.

Rogers’ model has implications for the transformation effort in KMSD. The district is attempting to implement individual innovations
(e.g., new charter schools, a new grading policy) and, at the same time, change its culture from one in which the community accepts the status quo to one in which the community not only accepts but demands innovation. The many initiatives currently underway are manifestations of a broader change in approach informed by a deep understanding of the future world for which students, and the entire community, must prepare. This broader change, referred to as “transformation” by KMSD, will succeed only when the adoption cycle described by Rogers is completed - that is, when even the laggards have undergone the five stages of adoption and the majority of the community has decided, implemented, and confirmed the transformation.

As noted earlier, transformation is difficult to see and feel. Thus, unlike adoption of new technologies, such as cell phones and the use of social media, the point at which the majority has adopted “transformation” and the cycle becomes unstoppable will be difficult to identify. It seems clear, however, based upon the history of the transformation effort beginning in 2004, that KMSD has succeeded in engaging the innovators and early adopters in the process. Discussion at the recent community forum indicates that the early majority has begun to get on board as well but progress toward reaching the top of the curve may be stymied by several factors. The next section of this report presents summary recommendations for continuation of the transformation effort drawn from the thoughtful input of the community and Rogers’ work.
RECOMMENDATIONS

Communication.

Participants were emphatic in the need for more communication with stakeholders about the nature and purpose of transformation. If, as Rogers asserts, knowledge is the first stage in the adoption process, communication efforts to inform and educate about the changes taking place are critical. There is no doubt that this is an area in which the district has made great strides over the past five years as it has implemented with gusto the recommendation to “access 21st century communications.” In addition to the improvements in communication from the district to stakeholders, however, more should be done to provide feedback loops from stakeholders to the district and to encourage interaction among stakeholders. The adoption cycle depends upon maximizing the use of social networks – particularly of the early adopter and early majority groups. At this stage of the process, it is not enough to inform (although this continues to be important); persuasion must also play a role. This persuasion is best accomplished not by district leaders alone but by activating social networks through which stakeholders from the early adopter group influence those in the early majority who, in turn, will eventually influence the late majority and the laggards. The district should construct a comprehensive communications approach that addresses the various factors influencing adoption. A critical component of this plan should be the use of the social networks of key stakeholders so that, as with YouTube videos and Facebook postings, transformation can “go viral.”

Demand for Change.

Even the most compelling innovation is unlikely to gain traction if the need for it is not well understood. In a high-performing district like KMSD, the urgent need to change is not apparent to most observers. In addition, in times of great economic and political uncertainty, people naturally look to their traditional institutions, like schools, for comfort and stability. There is little incentive to undergo the rigors of change when most children are doing well (by today’s standards) and when economic challenges require so much attention. And yet, as became clear through the scenario planning process, the world is changing in such a way that today’s success could easily become tomorrow’s failure. The innovators and early adopters in KMSD under-
stand this. It is critical that a broader group begin to understand this as well. The need for change must be not only understood intellectually but emotionally as well. It is in this way that the adoption cycle can continue. The district should incorporate education about trends of the future and their impact on student preparedness into its comprehensive communications plan.

Vision.

When contemplating significant change to an existing institution, questions about the fundamental nature and purpose of the institution arise. As the district seeks to fundamentally transform its educational delivery system it is natural for stakeholders to ask, why, and for what outcome? It is far easier to weather the challenges of a difficult journey when the destination is clear and visible ahead. And, yet, it is in the nature of transformation, unlike other kinds of change, that the destination itself is not well-defined. Innovators and early adopters may have little difficulty imagining a transformed KMSD. For others, the absence of a vision of the future and an understanding of where one fits into it can delay or, even, derail the adoption process. The district should consider ways of engaging stakeholders in a visioning process that results in deeper understanding of what it means to transform as well as concrete examples of how a transformed KMSD will look.

These recommendations are not, by any means, meant to imply a need to slow down the actual implementation of individual innovations in the district. The addition of charter schools, the implementation of changes in the grading process, and involvement in the Next Generation Learning Project help to make visible the transformation. These and other initiatives begin to answer for the early and late
majority the key question, what does a transformed KMSD look like? Participants in the community forum made it clear that they believed the district should not wait for complete buy in before implementing change, while at the same time responding to the community with sensitivity and creativity.

CONCLUSION

This report provided background information on the transformation effort in Kettle Moraine School District from 2004 until today. It described the scenario planning process that has undergirded the effort, provided links to various interim reports, analyzed and summarized input from the February 2011 community forum and provided recommendations for continuing the transformation effort.

KMSD will continue to benefit from its forward-thinking board of education, its capable and creative central administration and staff, and its engaged community dedicated to the success of every KMSD student. District leaders well understand the need to continually and thoughtfully anticipate the future. By doing so, they, along with the entire community, will ensure that KMSD is the “best that it can be” today and in the future.
APPENDIX A
“Best Advice” From Community Forum Attendees
February 26, 2011

1. Promote Innovative Approaches to Teaching and Learning
   a. Make classes separated so kids who want to learn are with other kids who want to learn and not kids who mess around.
   b. Make it possible for high-schoolers to explore careers during the school day, as a course, outside of the high school walls.
   c. Continuum-based grouping versus age/grade grouping – and match teachers accordingly.
   d. Continue to grow the development of charter schools.
   e. Working lunches with cross grade levels together.
   f. Create options for how schooling looks in KM by investing in more charter schools – innovative class, grade level or school-wide projects/programs. In fact, recognize these innovations.
   g. I think we need to invest in staff development that will impact our teachers in ways to meet the needs of all students.
   h. Continue to develop all of your staff – not just teachers.
   i. Develop tools and approaches to afford each KM student the opportunity to succeed whatever their attitudes and interests might be and learn to use 21st century technologies to communicate with all constituents.
   j. In order to make a personalized learning experience, it is essential that there be flexible schedules so students can have the opportunity to take their learning to the next level.
   k. Allow schedules to be less rigid so teachers have the flexibility to do project-based learning.
   l. Engage parents, teachers, community in the work of their content – inquiry-based or service learning projects requiring knowledge and application of knowledge.
   m. Be willing to consider restructuring the school day – not necessarily 7:30 to 2:30 or 8:30 to 3:30, 180 days a year.
   n. It seems like a lot of the ideas are for high school students – we need just as much transformation at the elementary level.
   o. Ensure a work environment to attract and retain only the best teachers and support staff possible.
   p. Concept-based learning; exploration, revolution, growth where students can be allowed to make their own meaning.
   q. Year-round school with workshop learning for teachers and students during interim times.
   r. Continue to encourage charter schools at all levels of the district.
   s. More project-based work – less memorization work.
   t. Transform education from being grade-based and memorization-based, to a project-based individual or team effort. Have kids work together on a fun projects that has to do with what they are learning in the classroom, instead
of taking tests.

u. Create seminar-based courses in middle/high school around topics of interest within a discipline and then engage in work/service related projects to apply learning across a flexible day.

v. Hire and evaluate staff who want to see this succeed. Staff retained and paid on merit.

w. Use high school students to run seminars for teachers on effective uses for technology in the classroom’s communications.

x. Rethink role of teacher – facilitator of learning, not lecturer of subject.

y. Encourage and “structure” future for personal learning journeys and tie that with Subject Matter Experts (SMEs) and business.

z. Engage teachers and support staff in conversation around flexible scheduling to ensure most efficient and effective use of our time.

aa. As adults we need to raise our expectations of our children, they will meet the goals we set.

bb. Develop partnerships with people who have expertise in a particular subject, practical experience, passion, and the ability to communicate in order for them to track a limited subject/time period.

c. College-style class schedule year round.

dd. Consider allowing elementary teachers to grow and teach into their niche areas across grade versus just their classes.

ee. Bring “critics” into the schools to the curriculum and use their skill sets to support education.

ff. Learning should be a 24/7/365 event that the school and teachers can facilitate.

gg. Teacher assessment will be a tool that grows your professionals. Invest energy into refining this process and training your administrators to be effective in this role.

hh. Meaningful staff development. It needs to serve a purpose and can be measured in value.

ii. Requires lots of guidance to help students determine areas of interest – yet not lock into career “tracking.”

jj. Encourage flexibility in use of time and scheduling.

kk. Building learning capacity and a love for learning is the end goal

ll. Teach relevance to life beyond academics.

mm. Implementing more “real life experiences” is so important to prepare you for the future beyond schooling.

nn. Individualized learning is a very important tool to improve a student’s learning. By implementing KM Global/Perform scheduling into the regular school day-to-day you will give students a chance to reach a potential they never have before.

oo. If the end goal is the “real world” then a way to show this to students is to bring in outside resources. For example, bringing in the Medical College to show what research is like. Or bringing in artists for KM Perform. If people/programs can be brought in, this will stimulate learning. This
shouldn’t just be for select students, it should be open to everyone. Also, if multiple subject areas can be brought in, this will help attract students with different passions. This should just be speakers but hands-on involvement because it stimulates critical thinking and problem-solving.

pp. Learning is fun, teach kids how to learn – it is a skill that never stops paying dividends.

qq. Encourage risk taking to try new teaching delivery methods.

rr. 24/7 opportunity for learning.

ss. Involve students from a young age in activities that help them learn about their individual styles, talents, strengths.

tt. Implement a system (K-5) of student led conferencing, supported by a different schedule which provides adequate time.

uu. Staff development centered around how students can use technology to pursue/enhance learning.

vv. Focus on individualized learning that allows every student to build problem-solving skills and learning capacity.

ww. Teachers, teaching to the learning style of the individual student.

xx. Relevance is key – make sure students are learning things absolutely necessary.

yy. Brainstorm further ideas for the K-5 group.

zz. School building open 24/7.

aaa. Make AFL or grading scale universal throughout each classroom so it’s a true testament to a student’s learning.

bbb. Continue to create & cultivate an attitude of “love for learning” beyond the schools and higher education.

ccc. Help cultivate and value listening – give examples and non-examples seen in our society (local and statewide).

ddd. Assign each student an advisor/(life coach?) (or students can request advisor). (Can we pay “teachers” by # of “advisees”?)

eee. Focus on healthy (hallways) kids.

fff. Figure out how to build leadership skills into the curriculum by engaging the community into the education process.

ggg. Encourage kids to have a life outside of school (learning doesn’t stop at the gates)

hhh. Foster your teacher leaders – create the legacy needed

iii. Can you start a new teacher’s union with less rigid rules, or no union at all?

jjj. Please use the collective wisdom of your teachers when taking a step in the transformation. They need to feel empowered and part of the process.

kkk. Closely monitor implementing technology (1) Safety issues; (2) Cheating; (3) Make sure not to further decrease interpersonal interaction.

lll. Make more partnerships with local businesses, companies, research labs to get real world experiences (from a young age).

2. Pace the Change

a. Change is good.
b. Be open to changes that are brought to the table.
c. Parents, staff and students who aren’t interested in moving forward with change need to make other choices – not KM!
d. Invest in excellent teacher/facilitators who want to change and learn.
e. Transformation is not a destiny; it is a journey. The “stakeholders” need to understand that change in design is inevitable.
f. Nail the change management aspect of the transformation. Thoughtfully assess your audiences and how to communicate with and through them to ensure understanding and shared expectations.
g. Realize that change is good but ultimately knowledge is king.
h. Continued support of all stakeholders is necessary for rollout of anything new.
i. You are the experts – believe in what you are doing and continue to move forward. Stay strong.
j. Trusting relationships go a long way – build them.
k. Stay the course.
l. Be patient, but steady as you move forward. Perform and GOAL will naturally pave the way.
m. I think you should take into account that transformation can’t wait. It can’t be a slow process. Communication/engagement during transformation is critical, but I would err on the side of a speedier transformation.

n. Please ensure a safe way for teachers to have a voice in partnership with the school board, community, parents, administration and each other.
o. Understand why parents have fear when it comes to the school changes.
p. If people trusted you they would “leave” you alone.
q. Be honest; build trust.
r. Make decisions and explain why to the public.
s. Be confident to keep moving ahead with transformation.
t. Do not let those who are fine with the status quo weaken your position that we need to provide the best education possible to our students.
u. Support teachers’/parents’/students’ innovative ideas and back them up. These minds can lead us into a new direction.
v. It’s time to move forward now: Start with year round school in 2011/12 with flexible scheduling of some classes.
w. Start now.
x. You can’t please everyone so do what you believe is the right thing to do.
y. Prioritize what is critical to create consensus over and what is not.
z. Be bold and have courage as you proceed – leading change requires that.
aa. Teachers need to be on board for change, because students/parents look towards them.
bb. In the midst of “transparency” recognize the impact of reflection or instances of mistakes, reorganized thought/systems or process that need to come as a reflection of failure.
cc. Please make sure as you implement new programs that you present them in a way that there is buy-in for all parties involved.
dd. Work as a team. Be truly transparent. Listen.
e. Don’t be afraid – don’t wait for everyone to be on board. Make sure a system is in place to assess effects of innovations.
ff. Begin the change now! Don’t wait for buy in! You will get it as students, teachers, administrators, parents all turn over and they only know the new way!
gg. Continue to communicate in many different forms to all stakeholders.
hh. Letting ideas of new change “sink in” instead of ramming it through right away.
ii. Create a sense of urgency in the ranks of the district employees and community that must transform or face potential dissolving of the district/failure of district.
jj. Support the “brave changers.”
kk. Concentrate on 1 or 2 initiatives at a time, so as to be able to devote enough time, energy and resources as necessary. Then move on to other initiatives. Do a few things well, rather than several things at less than a desire level. But do them all in the long run!
ll. Invite more community members into our schools to observe what teaching & learning look like in KM now so they let go of their “old” pictures and see change as less scary.
mm. Don’t give up – we live in very interesting times where education, or at least schools, are not valued as they should be.
nn. Being able to admit something isn’t working and change the course.
oo. Be very cautious with current “politics” tainting the process. Wait for things to calm down.
pp. Try and see the current political situation in Wisconsin as a possible opportunity for transformation.
qq. Use the craziness of the current time and budget crises to drive more effective use of resources and change how to get things done.
rr. Continue providing and encouraging teacher leadership.
ss. Start with the philosophy that we need to be leaders (as identified by Jim).
LEAP FROG!
tt. We need to talk about true transformation, since some of what has been done since 2007 is really more transition. There are more barriers to transformation than transition.

3. Implement a Comprehensive Communications Plan
a. Communication – communicate with the community about changes/ideas (maybe a blog).
b. I think you should update the website so community members, parents, etc. can get the information they want without digging around.
c. Invest in finding a solution to communicating with all stakeholders regarding transformation (why do we need to change, possible changes, how to get involved). I think this will take a focused effort to meet people where they are (in their homes, in their community, small groups, one-on-one,
etc.). This work will be difficult and time consuming, but the necessary foundation to ensure fast paced change in the near future. Go slow, to go fast.

d. Communicate with multiple stakeholders, but be clear that this is why we are doing this.

e. Communicate in a variety of ways.

f. Develop a plan on how to communicate to parents and community what a “transformed” KMSD will look like and why transformation is necessary. Build ownership of plan.

g. Continue to improve communication with everyone involved (students, parents, staff, community members) so that everyone sees the common goal and the big picture.

h. Continue to host intentional conversations throughout the district in a variety of venues. Have 1 or 2 critical questions leading the conversations, such as: What does a transformed KMSD look like, or what is our greatest fear?

i. Specifically engage the teachers and the students in providing input and recommending how to transform and what to transform to.

j. Collaborative communication with multiple pathways between educators, students, parents, community members and business organization is critical to achieving successful transformation.

k. Communication is key – when change meets the uninformed, the message can be lost.

l. Use the word transformation more in communications.

m. Listen to the majority not the loud voice.

n. Support teachers who are willing to change.

o. Allow teachers to take risks in an effort to change. Be flexible.

p. Don’t be afraid of the community push back/fear of change.

q. Keep parents, teachers and students more involved in the decision-making process all year. Less top-down.

r. Communicate, communicate, communicate and then communicate some more.

s. Communication – i.e., different ways to receive info such as podcast, teleconference, etc.

t. Increase transformation/communication with KM community; using all forms of communicating especially face-to-face.

u. Before implementing any new initiative, take sufficient time and utilize as many staff members as needed to develop a comprehensive communication plan, then present it to all stakeholders, in different venues and several times, so everyone knows what to expect beforehand.

v. Utilize teachers as links to a public persona for public education.

w. Change should be communicated and supported ahead of time.

x. Develop marketing strategy that sells education to the community.

4. Focus on Students
a. Listen to the children.
b. Stay focused on personalized learning for students.
c. I think you should make sure that you consult the students and get their input on the transformations.
d. Collect information and ideas from students. Perhaps hold a forum like this for middle school and high school students. You'd be amazed at what forward thinkers they are.
e. Utilize high school students and have them teach us how to use technology to its full potential.
f. Involve the students in the planning & implementation.
g. Keep it about what is best for kids and then do whatever it takes!
h. Each student is a unique individual who is full of potential to change the world... teach them that way!
i. Include present students and recent former students in the process.
j. Do what’s best for kids.
k. Stand up for the students.
l. Let's put our focus on our children—we need to move forward for their sake.
m. Be “customer-led,” in other words consider the transformation through the needs and wants of the kids you serve.
n. I think that district leaders really need to include input from all of the different viewpoints, like students and parents. If you’re going to change the way school is run, then students need to be involved. This is going to affect us and we have a different way of looking at what’s happening than administrators or teachers. This will also help with bringing the students on board and there will be less resistance. Essentially, communication is key.
o. Find ways to gather data from students who are out of school – questions, i.e., what are your biggest gaps, best preparation. What did you need to know but didn’t have the chance to learn?
p. District leaders must continue to seek input from our current KM high school students. What an inspiring group to have at an event like this!
q. Every decision should be made by asking—Is this best for kids?
r. All leadership committees must have students on them, PTO/PTA, etc.
s. Communicate with students to find out what they want to learn.
t. Be sure that every communication to the community about transformation focuses on the benefit to the student.

5. Expand Reach; Reduce Limitations
a. Begin to reach out to businesses to start a collaborative effort in education our students.
b. Partner with other districts so that we can move through this together and not just transform education at KM but in Wisconsin and beyond
c. Proactive engagement with business and civic organizations.
d. We must look for ways to increase revenue from outside sources, businesses, grants, to help move our transformation forward.
e. Seek huge funding sources that would create autonomy and freedom from mandates that hold us in traditional systems.

f. Proactively address the current “crisis” in Wisconsin, including the staff—allow them to help shape the future as part of “us” instead of being thought of as “them”—they are part of the solution—not the problem.

g. Work to involve the community by starting with the parents and build a respect for education.

h. Create reciprocity with other local schools to more effectively utilize resources, i.e., auto shop at Waukesha North or Gary’s Auto; Arts at KM, swimming @ Mukwonago, etc.

i. Need to get the traditional governing rules changed to allow flexibility to change. Example—get a mandate from voters to get state and federal rules changed.

j. One gap to success appears to be focused on community involvement. It’s time to get the various government leaders and other influencers vocal on the need for KM to change.

k. Educate public (especially non-property owners) on budget constraints/why does transferring “your” $ to charter schools hurt you and hurt the community?

l. Community endowment funds.

m. Establish community foundation for education.

n. Getting parents on board and getting their input.

o. Live within your financial means.

6. Augment Research and Development

a. Develop and support (financially) a research and development piece to the district.

b. Research and understand the effective methods of education in those top countries that we could adopt.

c. As you move forward into the field of innovation, engage your professional staff in action research so that there is a “disciplined” protocol around the innovations that could be used as “data” for the community to review.

d. Report what the environments are like in the most successful situations, i.e., culturally, societally, parent value, etc.

e. Giving feedback and statistical information on how the change worked or didn’t work.

f. Research alternative education methods such as Montessori School of thought? Are there tips to glean from that methodology?

g. With each possible systemic change, understand the evidence-based reason of why the change is better than the status quo.

h. Thinking about Jim’s presentation and the desired characteristics of individualized instruction, please consider established alternative methods of education, like Montessori.

i. Find a way to define and measure the impact of the diagram that Jim Rickabaugh and Laura Lefkowits used. What are the descriptors, qualities,
connections, etc.

j. Put in place a research and development team – they have a lot of work coming their way.

7. Clarify the Vision

a. Create a common vision for what “school” should look like so that students have the knowledge, skills and attitude necessary to be successful members of the 21st century society.

b. I think the goal of high school should not be college, but a successful life including further education perhaps, but also knowing that money is not “everything.”

c. In order to transform, we need a clear, agreed-upon vision. It begins by defining the skills, knowledge and attitude—the standards expected of each child.

d. Re-define “fair”.

e. Clearly define your purpose and ultimate outcome – then define the best way to get there, including the obstacles that will need to be removed.

f. Define the end picture (or pictures) – redefine (create controversy). Have a plan to manage the transition (take care of “right now” needs). Engage the community more and more.

g. Define the purpose and make it a K-12 destination.

h. Aim to be the best, do not be comfortable with being average or pretty good!

i. The focus should be on continuous improvement, not “change.

j. Focus on the most effective use of time, effort, resources for the mission of the district.

k. We are constantly making comparisons to other countries based on standards that have been around for years. Instead of trying to reach one expectation of being better than the next, strive for improving beyond that. The best KMSD can be.

l. Look at the big picture, not just five years down the road. Consider the global economy and budget within the means of the school district.