DOCUMENT RESUME

ED 052 766 HE 002 492

AUTHOR	Schultz, James; Winstead, Philip
TITLE	The Educational Development Officer: A Catalyst for Change in Higher Education.
INSTITUTION	National Lab. for Higher Education, Durham, N.C.
BUREAU NO	BR-6-2556
PUB DATE	1 Jun 71
NOTE	67p.
EDRS PRICE	EDRS Price MF-$0.65 HC-$3.29
DESCRIPTORS	Administrator Characteristics, *Administrator Responsibility, *Administrator Role, *Change Agents, Higher Education, *Organizational Change, *Planning
IDENTIFIERS	*Educational Development Officer

ABSTRACT

This monograph describes a new type of college administrator, the educational development officer, proposed by the National Laboratory for Higher Education. NLHE developed the concept over the past 3 years with the aid of representatives from selected colleges and universities who have been serving as EDOs. It conceives the EDO as a senior level, highly professional administrator who would deal with the problems of bringing about constructive change and develop ways to cope with ever increasing complexities of higher education institutions. The monograph examines the concept, position and role of such a planned change specialist. It explores the theoretical bases of the role, places the functions within the framework of NLHE's Administrative and Organizational program, and suggests a model for implementing the concept. The discussion is based on a review of the literature on organizational change and development, planned change, internal and external change agents, and institutional innovation and reform. It is supplemented by information gained from structured interviews conducted with 31 senior college and university administrators, institutional development and change experts, and other educators. (JS)

THE EDUCATIONAL DEVELOPMENT OFFICER: A CATALYST FOR CHANGE IN HIGHER EDUCATION

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ADMINISTRATIVE AND ORGANIZATIONAL SYSTEMS
NATIONAL LABORATORY FOR HIGHER EDUCATION

THE EDUCATIONAL DEVELOPMENT OFFICER: A CATALYST FOR CHANGE IN HIGHER EDUCATION

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June 1, 1971

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FOREWORD

The Educational Development Officer: A Catalyst for Change in Higher Education describes a new type of college administrator proposed by the National Laboratory for Higher Education (NLHE).

NLHE has developed the concept of the Educational Development Officer (EDO) over the past three years with the assistance of representatives from selected colleges and universities who have been serving as Educational Development Officers.

This monograph was authored by two educators well acquainted with both the theory and practice of higher education. James M. Shultz, former director of the Center for Higher Education at the National Training Laboratories Institute for Applied Behavioral Sciences, is an independent organization consultant. He earned his Ph.D. in sociology at the University of Chicago and is a former college faculty member. Philip C. Winstead, who holds a doctorate in educational administration from Duke University, is associate director of the NLHE Senior College Division and responsible for liaison with the colleges and universities the division serves. Dr. Winstead also is a former college faculty member and administrator.

Especially helpful in preparing this report were the comments and suggestions of educators with special interest in change strategies and other professionals serving in change-catalyst roles.

The concept of a person acting as an internal change agent is not new; slightly different forms of it were first proposed more than a decade ago. The concept and position of the EDO, in the AOS context, however, are clearly innovative. NLHE will be placing major emphasis on the EDO in the years ahead. The Laboratory's Senior College Division will be aiding cooperating institutions in recruiting and training EDOs as well as developing the required materials and techniques for in-service education of EDOs.

We both solicit and welcome suggestions, criticisms, and comments from those who read this monograph. We will find them helpful as we continue to refine and develop the concept and continue the task of putting the ideas described in this report into actual practice on college campuses.

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THE EDUCATIONAL DEVELOPMENT OFFICER: A CATALYST FOR CHANGE IN HIGHER EDUCATION

Introduction

The Educational Development Officer (EDO) represents a new role being advocated and developed by the National Laboratory for Higher Education (NLHE) as a part of its Administrative and Organizational Systems (AOS) program. Based on the literature of organization development and management science, as well as basic assumptions about the nature of higher education, the EDO is seen as an important aide to the college or university president and others involved in the institution's decision-making process.

Organizational Need

The EDO represents a senior-level, highly professionalized role in higher education. He deals with the problems of bringing about constructive change, the management of change, and ways to cope with the ever increasing complexities of institutions of higher education. As a catalyst for institutional advancement, the EDO helps establish a climate conducive to maximum productivity by all of those engaged in the administrative and educational processes on campus. Working in a "staff" rather than "line" capacity, he attempts to ensure that the administrative and educational decisions being made are based on the best research and knowledge available. Such a role has emerged and has been formalized in various organizations in industry, as well as in service and governmental agencies. A need, it is believed, has emerged for this role

in higher education.

Many factors have led to this belief. Events such as the increasing public scrutiny of higher education, rising student awareness, the leveling-off of financial support, and the need for further clarification of institutional goals and objectives have combined to establish a recognized need in higher education for more effective mechanisms to implement planned change and to provide more effective control over the fate of individual colleges and universities (Bhola & Blanke, 1966; Dykes, 1966; & Gardner, 1964).

The concept of the EDO reflects an organizational need that has been ignored too long in higher education - the adaptive function of organizations. Complex organizations (Katz & Kahn, 1966) need a built-in mechanism for looking at themselves both inwardly and outwardly, constantly aware of the survival requirements of the system in a changing environment, with primary concerns about problems of adaptation.

An Innovative Position

The concept and position of the EDO, in the AOS context, are innovative. There are, however, a number of institutions in the country where a person is designated specifically to involve himself with constructive change, organization development, management information systems, data-based intervention, and systematic planning and decision-making. One can identify titles such as coordinator of planning, director of systems, vice president for innovation, "vice president for heresy," and assistant to the

president for institutional development. The concept of the ombudsman also is based on some of the EDO premises. But no institutions are known, except those working with the NLHE on an experimental basis, that have introduced these concepts in the manner in which they are currently being developed and tested by the Laboratory. The general idea of a well-trained, high-level specialist to facilitate change in higher education has been discussed in the literature and used by some institutions for some time (Coombs, 1969); but, there has been no great emphasis on the more comprehensive concept of planned change as envisioned by AOS: defined as system renewal, sponsored by top administration, knowledge based, and coordinated by a planned change specialist.

This monograph examines the concept, the position, and the role of a planned change specialist called the Educational Development Officer. It examines the conceptual and theoretical bases of the EDO role, places the function within the framework of the Laboratory's Administrative and Organizational Systems program, and suggests a role model that may have merit for implementing the concept.

The substantive content of the monograph is based on a review of the literature on organizational change, organization development, planned change, and internal and external change agents (Beckhard, 1969; Bennis, 1969; Lippitt, G., 1969; Bennis, 1961; Lippitt, R., 1958; Gardner, 1965; Guest, 1962; O'Connell, 1968; Rogers, 1962; Coleman, 1966; Steiner, 1969; & Burns & Stalker, 1966). The literature on innovation and reform in

institutions of higher education also is pertinent (Miles, 1964; Hefferlin, 1969; Riesman, 1956; Evans, 1968; & Eurich, 1969). In addition, structured interviews were conducted with 31 senior college and university administrators; organization development specialists; institutional change agents; and other educators considered perceptive in this area (see Appendix B). Included among those consulted were persons who have been examining and writing about institutional change strategies. Finally, those members of the NLHE staff who have been working with all or parts of the concept in its practical application during the past three years were queried.

The AOS Concept

Much is being written today about the problems facing institutions of higher education in the United States. Most are facing major financial difficulties, increasing student and faculty concerns about the organization and administration of higher education, and the myriad of nagging problems that continually arise in complex organizations. Nearly all administrators are being faced with a declining public confidence in higher education generally, a situation that is drawing demands from many constituencies for increased relevancy and accountability.

In the minds of many observers of higher education, these concerns are only symptoms of more deeply-rooted problems - problems of: vagueness of institutional purpose; discrepancies in values among students, faculty, administrators, and other constituent groups; ineffective resource allocation in relation to specified

goals and objectives; inefficient operations; and the lack of any workable mechanism for institutional self-renewal.

As a result, many educators are beginning to recognize that no phase of institutional development can be left to chance, impulse, or coercion. There is, moreover, the belief, held by many, that a scientific knowledge base is now sufficiently developed which can contribute greatly to improving college and university organization and administration. Specifically, this appears to be the case in the areas of institutional research, management information, planning, decision-making, and the management of change.

Against this background, the NLHE has designed an administrative and organizational systems program to assist colleges and universities in introducing a continuous process of institutional development which facilitates normal administrative operations and, at the same time, encourages and supports constructive, and orderly change. AOS is the first known attempt to synthesize the knowledge bases of organization development, organization theory, management science, systems theory, and institutional research into one comprehensive approach to the problems of administration and organization in institutions of higher education.

AOS Basic Premises

The AOS program rests on three basic premises. The first is that the educational process, organizational structures, and administrative operations of colleges and universities are so complex that it is difficult for these institutions to be effectively responsive to the needs for change without adequate procedures for comprehensive planning and decision-making based on research; systematic setting of institutional goals and objectives; methods

for allocating human and financial resources consistent with pre-established goals and priorities; and continuous evaluation and modification of plans, programs, and processes. By using the systems approach to organization, planning, decision-making, and evaluation, it is hypothesized that a college or university can achieve a higher degree of educational and financial accountability than it has been able to achieve in the past.

The second premise is that there are now some practical procedures which will allow widespread participation in institutional governance by faculty, students, administrators, and other key constituent groups. Improved research techniques for collecting and analyzing data for decision-making are available. Computers and computer terminals for storing, retrieving, and analyzing information exist on most campuses or are available through cooperative or service arrangements.

The third premise is that the complexities of the change process and the comprehensiveness of the AOS program require an on-campus catalyst to serve as coordinator and expediter of this approach. This premise seems adequately supported by the increasing difficulties of the college or university presidency itself. Increasingly, the position is being recognized as almost an impossible one. The specific need is for increased professional support for the president and his senior administrators. Effective institutional functioning does not require more operating divisions or operational vice presidents, but rather improved means for coordinating and assisting those who are already there.

AOS Components

Based on the foregoing needs and premises the AOS program consists of a set of institutional planning and decision-making processes, along with the concept of the Educational Development Officer. AOS has three major components: organization development, information systems, and institutional research. The program represents a total system and is applicable to any institution of higher education.

The first of these components, organization development, is a process of planned change, participatory decision-making, and institutional self-development and renewal which integrates the needs and goals of individuals in the institution with the goals and objectives of the institution. It involves procedures for clarifying goals, deriving measurable objectives from goals, and implementing a comprehensive approach to management-by-objectives. The role of the Educational Development Officer is part of this component.

Information systems provide the means for gathering, compiling, storing, retrieving, and analyzing data for institutional planning and decision-making. Generalized computer-based systems are used to increase the responsiveness of information systems to the changing requirements of the institution.

Institutional research provides the research designs, measurement methods, statistical techniques, and other tools of systematic inquiry needed to make research-based decisions. It provides both the "why" and the "how" for gathering and analyzing

relevant data, formulating alternatives for sound decision-making, and monitoring progress toward the attainment of institutional goals and objectives.

Literature Review and EDO Role

The remainder of the monograph is comprised of two parts. Part One is a general review and discussion of the literature on planned institutional change and on the planned change specialist. Part Two, describes, based on the literature review and personal interviews, the role of the Educational Development Officer. Included in the latter part are EDO functions, a role model, his place in the organizational structure, his background and training, the skill profile desired, and stages and strategies for introducing the EDO into actual practice.

Part One

PLANNED CHANGE AND PLANNED CHANGE SPECIALIST

Much has been written in the literature of organization development and management science about planned institutional change and the concept of the planned change specialist.[1]

Concept of Planned Change

A review of this literature, with special emphasis on planned change, institutional change agents, and organizational change processes, highlights five underlying propositions (Gardner, 1964; Gross, 1963; & Bennis, 1961). They are:

1. the need to counteract a built-in bias of complex and bureaucratic organizations to move toward the status quo by creating differentiated mechanisms for renewal and redirection;
2. the need for formal management within an organization to deliberately initiate and foster such mechanisms;
3. the need for these renewal mechanisms to be based on scientific knowledge;
4. the need for these mechanisms to include professional change agent skills in consultation, organization development, training, action research, and planning, to facilitate a more predictable, constructive process of change; and

[1]There are several bibliographies available which summarize this literature (e.g., Maquire, 1970; Coad, 1970; Havelock, 1968; Kurland & Miller, 1966; Rogers, 1968; & Stuart & Dudley, 1968).

5. the need for a comprehensive consciousness of the desired direction and extent of movement in the whole system rather than isolated interventions.

Planned Change Defined[2]

The specific character of planned change as a distinct subcategory of institutional processes is defined by the four variables shown in Table I.

[2]For extensive definitions of planned change see Lippitt, R., 1958; & Bennis, 1969.

Table I

Types of Changes as Functions of Major Variables

		(1) Management Sponsored		Other-Sponsored (either internal or external)	
		(2) Produce Change	Maintain Stability	(2) Produce Change	Maintain Stability
(3) Research-based Knowledge	(4) Professional Change Agent	Planned Change	A	B	C
Knowledge not research-based (intuitive, trial and error, etc.)	(4) Professional Change Agent	D	E	F	G
	Other Agents	H	I	J	K
	Other Agents	L	M	N	O

This table is a graphic summary indicating that four variables must be present to produce planned change. The four variables are indicated by Arabic numbers in shaded blocks. Other types of change (indicated by A, B, C, etc.) may result from combinations of other variables. (Note: "Professional Change Agent" as a variable includes use of Professional Processes of Change).

Planned change deals with developing new and better processes and relationships, not with maintaining the current conditions. It is fostered, however indirectly, by top management or administration rather than by outsiders or by other intra-institutional elements. There are many types of change, but planned change refers specifically to changes sponsored, directly or indirectly, by top administrative officers of the institution. Top administrative officers are key causal agents. Planned change is based on knowledge of the change process itself, the specific system, and the desired changes in any given situation. There are many bases for change, but it is planned change only when scientific knowledge is a major basis. Finally, planned change is that particular type of management-sponsored, knowledge-based change in which a professional change catalyst plays a key role. There are many other models for bringing about change, but in planned change there are key interventions by internal and external consultants working in defined and legitimized roles.

Comparison of Two Major Approaches to Planned Change

Much of the literature on planned change falls into two categories -- organization development and management science. These two approaches are evolving rapidly in the literature and there is much overlap and complementarity between them. Each approach meets the criteria of planned change, but they are different with respect to their specific assertions about the direction of change, the knowledge base from which they draw, the professional change agent role, and the role of management. Each

approach is clearly an improvement over the absence of planned change, and the combined approach is a further improvement over either approach alone.[3]

Organization Development

Unlike management science, organization development is based primarily on the behavioral sciences and is less likely to rely on engineering and auditing disciplines. The emphasis of organization development is on team development, intergroup relationships, organizational climate, and communication processes. The intervention strategies usually rely on training, data feedback, third-party intervention, and process consultation. Organizational health is defined in terms of an open, problem-solving atmosphere; trust; participation; self-control and self-direction; and the ability to deal with psychological and sociological resistances to change.

Many of the leading proponents of organization development have been associated with the laboratory training approach and, although human relations training is not considered by leading practitioners to be a core element of organization development, certain corollary tendencies are reflected in an emphasis on effective collaboration and interpersonal relations. For example, according to Bennis (1969):

> I have no easy answer to this dilemma that faces every organization development consultant and change

[3]It should be noted that some writers on organization development see it as the master concept (Beckhard, 1969). These writers either define organization development as a synonym for planned change or they include many elements of management science in their organization development approach.

agent: How can he operate in situations of dissension and conflict to help people in those situations to discover and affirm the values of collaboration and commit themselves to its achievement?

Recently, (Bennis, Benne, & Chin, 1969) I set forth some general principles that may lead toward a wiser handling of the dilemma:

1. collaboration is an achievement, not a given condition. The ways of effective collaboration must be learned.

2. conflict is not to be avoided by a change agent. Rather, he faces conflict in himself and in others and seeks ways to channel the aggressive energies of conflict and power toward the achievement of personal and social gain for all concerned.

3. power is not a bad thing, though much behavioral-science literature treats it as such through indifference or ignorance.

4. social action depends on power just as physical movement depends on energy. Nothing changes in human affairs until new power is generated or until old power is redistributed.

5. the organization development consultant strives to utilize power that is based on and guided by rationality, valid knowledge, and collaboration and to discount power based on and channeled by fear, irrationality, and coercion. The latter kind of power leads to augmented resistance to change, unstable changes, and dehumanized and irrational conflicts. Still and all, one had better understand these irrational and powerful forces.

Unless models can be developed that include the dimensions of power conflict in addition to truth alone, organization development will find fewer and narrower institutional avenues open to its influence. And in so doing, it will slowly and successfully decay.

> OD pays lip service only to structural (or technological) changes while relying on a change in organizational "climate". I mean by "climate" a set of values or attitudes which affect the way people relate to each other, such as "openness", authority patterns, social relations, etc. This is no mean feat, of course, but again - related to the preceding point - it is seriously restructive. The organization development literature is filled with vague promises about "restructuring" or "organizational design" but with some exceptions (e.g., Argyris, 1964; Likert, 1967) few outcomes are actually demonstrated. Program budgeting, computerization, new communication systems, structural imagination, "open posting" of new positions (e.g., polaroid plan), a job enlargement, for example, may have far more impact than a dramatic shift of "organizational climate." It is difficult to understand the effects of climate, as a matter of fact, unless the attitudinal - value complex is reflected in concrete organizational designs. Far more has to be done in bridging an engineering design approach with organization development change strategies before the goal of "socio-technical" approaches can be anything more than respectable jargon.

Management Science[4]

The management science approach is less likely to try to introduce trust and participation into a bureaucratic authority system. It is more likely to focus on structural changes such as facilities or positions which tighten up the bureaucratic structure. Financial auditing and reward procedures are very prevalent, as are economic and engineering variables. It includes various new inventions and techniques, e.g., computerized management information systems, program planning and budgeting (PPBS), and systems analysis. Such control and information systems assist management in decision-making and planning. Institutional research, when it focuses on

[4]The emphasis described here as management science is also discussed in the literature as operations research (Beckhard, 1969).

information and control, is part of management science.

The structural and technological emphasis of management science is illustrated by fund-raising firms, facilities development, planning firms, and management consulting firms. A full list of disciplines and specialties would also include environmental forecasting, design of decision systems, project management, and operations research.

Common Elements of Organization Development and Management Science

It should be noted that both management science and organization development are recent developments and rely heavily on empirical science, an effective relationship with the client system, systems theory, holistic approaches in terms of awareness of the interdependence among internal parts, a professionally trained consultant or technical adviser, and managerial sponsorship (Beckhard, 1969). Both organization development and management science are planned change approaches. The debate between approaches often obscures the fact that either approach is an improvement over the absence of planned change. Some of the individual and common functions of organization development and management science are shown in Table II.

Higher Education As An Arena For Planned Change

Much has been written about the unique characteristics of higher education and the inapplicability of management techniques in business and industry to higher educational institutions. Common reasons given are usually the change-resistant nature of higher education and the bureaucratic or collegial structures

Table II

Individual and Common Functions of Organization Development and Management Science

Functions	Organization Development	Organization Development and Management Science	Management Science
Action Research Methods	X		
Salary Administration			X
Auditing			X
Conflict Management	X		
Change Analysis	X		
Community Analysis		X	
Community Development	X		
Creative Risk Taking	X		
Change Agent Training	X		
Case Studies		X	
Cost/Benefit Analysis			X
Computer Modeling			X
Cost Accounting			X
Delphi Techniques		X	
Environment Assessment		X	
Force Field Analysis	X		
Facility Development			X
Fund Raising			X
Group or Team Development	X		
Human Factors		X	
Inter-Group Negotiation	X		
Individual Career Planning	X		
Innovation		X	
Instructional Unit Analysis			X
Job Enlargement			X
Management-by-Objectives		X	
Management Training			X
Market Analysis			X
Media Research			X
Mutual Goal Setting	X		
Organizational Mirroring	X		
Organizational Sensing	X		
Participative Governance		X	
Performance Testing			X
PERT			X
PPBS			X
Personnel Evaluation			X
Quantitative Analysis			X
Role Playing	X		
Scheduling Systems			X
Sensitivity Training	X		
Simulation	X		
Social Research		X	
Survey Feedback	X		
Task Group Therapy	X		
Time and Motion Studies			X

that have become traditional in institutions of higher education. The literature, however, does not necessarily accept these reasons for the inapplicability of either organization development or management science to higher educational institutions.

Planned Change Approaches and the Special Change-Resistant Characteristics of Higher Educational Institutions

The professional literature on higher education has often argued that the university is one of the institutions in society least amicable to change. The literature points to the anti-change effects of guild-like, disciplinary loyalties; tenure; weak leadership structure; traditions; and reactionary boards of trustees (Rudolph, 1962; Sanford, 1962; Gardner, 1964; Gross, 1963; Kerr, 1968; & Evans, 1968).

Features are identified which weaken the management approach to institutional planning and development: decision-making is diffused, the product is intangible, and faculty members do not act like employees. Corson (1960) argues that such features mean that modern theories and tools of management are not applicable to present-day university structures.

Unlike much of the literature on higher education, the planned change perspective - including both organization development and management science - does not suggest that one particular class of organization (religion, education, business, industry, government, or community) is inherently the most rigid or unchangeable. When properly understood and practiced, the cyber-

netic (closed loop) features of management science and the socio-political sophistication of organization development have generic applicability even at the most macro-level (Etzioni, 1967). The planned change approach, rather than focusing on properties as they preclude change, would focus on how these properties can be assets for planned change. For example, higher education as an institution (Etzioni, 1961) would be changed by altering its ideals, values, and definition of professionalism. Concomitantly, bureaucratic, coercive, and utilitarian interventions would be less potent than in business organizations.

While college administrators decried professionalism and massive size, the advent of organization development and management science was positively correlated in industry with the degree of professionalism in employees and the size and diversity of operations. Davis (Bennis, 1969) describes TRW Systems (a complex, professionalized organization and one of the organizations which has made the most use of planned change through organization development) as follows:

> TRW Systems currently has about 12,500 people. About a third are professional engineers and half of these have advanced degrees. It is an organization with products of tremendous innovation and change. It is an organization that is highly interdependent. We have a matrix organization; there are project offices and functional areas of technical capabilities such as structures, dynamics, guidance and control. A project office, to perform its task, must call upon capabilities and people throughout the organization. This is a very complicated matrix of interdependencies. No one can really get his job

> done in this kind of a system without working with others. As a result, problems of relationships, of communication, of people being effectively able to problem-solve with each other, are extremely critical.

The above indicates that professionalization and complexity are not unique to higher education. It also suggests that despite complexities in such an environment, the "pro-active" managerial role can be strengthened by using planned change approaches.

Planned Change and Other Approaches To Change in Higher Education

Based on a synthesis of the literature, the properties of higher education are taken into account in the following analysis of planned change versus traditional approaches to the administration of colleges and universities.

Managerial leadership vs. authority. Planned change does not rely on policy-making or incentives in the usual sense. Full use of influence, communication, and goal-setting processes are assumed. Various constituencies are involved and integrated into the decision-making process more effectively than in the past.

Social development vs. tangible development. Development in higher education has tended to deal with maintenance factors, such as fund-raising and physical facilities, while putting less energy into changes in socio-political factors. Planned change focuses on change in the entire socio-technical system. The new development plans will involve total institutional renewal.

Full vs. partial change strategies. Typical change strategies in higher education have focused on (a) a single method or

innovation, (b) shifting personnel or units on the organizational chart, (c) responding to immediate pressures or crises, or (d) starting new units or programs. A planned change approach is as broad a developmental effort as starting a new institution though it is amenable to the long-established institutions which make up the bulk of higher education.

Knowledge utilization systems vs. knowledge production systems. Planned change is primarily the use of knowledge. The proliferation of knowledge about institutions has far outstripped the ability of the university itself to assimilate and adapt. Instead of focusing on a single idea which may soon be obsolete, universities should install systems and roles for selecting, introducing, and adapting a wide variety of ideas and practices. There are hundreds of break-throughs in technology, media, and community organization. The most needed change, however, is the introduction of generic methods and mechanisms for using existing knowledge and tools. Management science and organization development are such methods and mechanisms.

Sophisticated vs. simple change models. Changes are complex social processes. The major theories of political science, anthropology, sociology, and psychology underlie the literature on planned change. Planned change, this literature suggests, usually involves risk, conflict, and some ambiguity during the initial stages. The pain and danger of such change is more than offset, however, by the very costly process by which changes are forced upon an unprepared institution. Somewhat parodoxically, changing organizations will have a higher level of conflict,

mobilization, and confusion and yet will be more managed in the sense of controlling their fate in a changing environment.

Change-weighted vs. stability-weighted organizations. Many administrators suggest that phrases such as planned change or change agents are undesirable in that they appear to attach a value to change per se. However, giving the benefit of the doubt to change and creating special mechanisms to promote it simply recognizes generic tendencies of complex organizations to move toward an irrational and dangerous status quo based on bureaucratization. Planned change assumes organizational lag and sets up mechanisms to counteract it. An ongoing capacity for constructive change should be one of the most important goals for institutions of higher education.

Managerial and Professional-Technical Specialist in Planned Change

The literature on planned change agents and the role of consultants emphasizes the difference between what has traditionally been referred to as line and staff roles. The professional planned change specialist is more oriented to knowledge and to a cosmopolitan fraternity based on common technology. The manager is more oriented to authority and administrative coordination. In the broadest sense, staff functions have to do with expertise. Line or operating roles have to do with supervision of personnel and decision-making responsibility. The key difference in professional-technical vs. managerial roles relates to the style of operation and basis for influence. For example,

Walton (1969) has described third-party attributes which suggest generalizable features of the specialist in planned change:

> We conclude that the following five role attributes are generally optimum for third-party work as described in this book, and therefore can be used for identifying third parties: (1) high professional expertise regarding social processes; (2) low power over fate of principals; (3) high control over confrontation setting and processes; (4) moderate knowledge about principals, issues, and background factors; (5) neutrality or balance with respect to substantive outcome, personal relationships, and conflict resolution methodology.

In Part Two of this monograph the distinction between managerial and professional-technical roles will be used to define the essential features of the Educational Development Officer. Key to this distinction is that the planned change specialist must influence the organization's future through his knowledge and skill, with low reliance on direct authority. No matter how high his status and influence, even though he reports directly to the president, he would not normally function in the top administrative role in the absence of principal administrative officers.

Central characteristics of the professional-technical role in planned change are illustrated in the literature on management consultants. The external management consultant is a highly professionalized role as defined by sociologists.[5] The superior consultant has high integrity and self-discipline. He

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[5]For a review of the literature on professionalism, see Vollmer & Mills, 1966.

has outstanding knowledge and skill, strong commitment to the fate of his client, high status, credentials, and autonomy. His autonomy is built upon an element of trust from the client and should ensure that the consultant will encourage a high level of professional judgment and creativity (Bennis, 1969).

Although the roles of manager and the planned change specialist are complementary, and each has commitment to the organization's development, their respective styles and bases for influence are markedly different. It has been observed that the best consultants rarely make the best managers and vice versa, reflecting the differentiated role requirements.

The Manager's Role in Planned Change

The effective executive gets things done through mechanisms and systems (Likert, 1961 & Barnard, 1962). Higher education executives, like the senior line officers in large complex organizations, have a shortage of time and energy and are exposed to continuing crises and pressures. To be effective, a team must be built and individual roles must be strengthened. These features, in other organizations, would be referred to as "management," and this is the term used in this discussion.

The manager's role is that of an indirect change agent. He can create and support renewal mechanisms and can decide when to introduce changes into the mainline structure of the organization. If he himself attempts to be a knowledge-based change agent, he suffers from at least five disadvantages:

1. his authority and role can create resistance, miscommunication, or

over-commitment.

2. he tends to be out of date in terms of emerging knowledge and techniques of change.
3. he tends to overplay a specific idea or approach.
4. he lacks the time and energy for follow through.
5. he must maintain the balance of stability and change.

The limitations of the president, academic dean, or other senior line officer as a direct change agent are illustrated when these managers have had extensive discretion while creating new and experimental colleges. The over-promotion of, and over-ego-investment in, a specific idea has been common. Also, lacking the full technical grasp, since much he has done was as a busy day-to-day administrator, many of the innovations were based on conjecture or on his earlier training, reading, and experience. Hazard (1969) describes the role conflicts which limit the administrator's role in the change process. He notes several fundamental barriers to change, including the absence of an explicit change agent role and a weak knowledge base. He concludes that while administrators are not direct change agents, one of the main tasks of administrators is to build planned change mechanisms into the organization rather than to attempt personally to play the change agent role.[6]

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[6]See also Lazarfeld, 1963; & Meeth, 1971.

The Specialist's Role in Planned Change

The model described in Part Two will focus on the role of the specialist in planned change as it applies specifically to higher education. This discussion focuses on planned change specialists and on their roles and techniques that are generic to all organizations.

The specialist in planned change is a specialist in knowledge utilization, a person who has up-to-date, critical awareness of a vast array of technical resources, and who monitors and facilitates their introduction into the organizational system. He works best when he is teamed with an external consultant (Lippitt, 1958; Bennis, 1969; Beckhard, 1969; & Lippitt, G., 1969). Ideally, the external consultant is more senior in terms of prestige, expertise, and in the respect and trust accorded by the senior line officers of the organization. The presence of a detached, high-level, external consultant enhances the likelihood of professionalism on the part of the internal change agent. Basic to the specialist in planned change is general skill in planned change interventions: consultation, diagnosis, training; skill in social and organizational functioning; a high-level of self awareness and self utilization (Bennis, 1969).

Role in Relation to Personality

The individual's potential for action in the role must also be considered. Role performance is a product of the interaction between a person and his environment, including role

expectations.[7] In this connection, Allport (1961) points out that performance is affected also by personality factors which may inhibit the attainment of desired performance levels. From the standpoint of the individual's personality, role performance is determined by role conception and role acceptance (i.e., compatibility with his personal make-up). In addition, the personality of those who define the role tends to influence the nature of desired performance. These factors need to be considered in developing the role of the specialist in planned change.

[7]See Mink, 1968, for a more detailed discussion of professional role identity.

Part Two

THE EDUCATIONAL DEVELOPMENT OFFICER

This part of the monograph is based on a review and analysis of the literature on planned change, organization development, management science, and change agentry, plus in-depth interviews with college and university presidents, other senior administrators, and organization development specialists. Members of the NLHE staff who have been involved with this concept for the past three years also were consulted.

Basic Premises

A major premise of AOS is that every college or university faces the need for constructive change and that every institution should be responsive to those needs by building into its organizational and decision-making structures the mechanisms for rational and orderly change. Great emphasis is placed on the belief that colleges and universities can function more effectively if goals are clearly stated, measurable objectives are derived from these goals, and a comprehensive approach to management-by-objectives is used. Consequently, management procedures, a comprehensive data base, an adequate management information system, and an ongoing program of institutional research are essential.

Both the literature and experience indicate, however, that for these objectives to be effectively accomplished, much more is required than institutional research and computer-based information systems. In any organization, it is the human element

and the human relationships that are the most crucial. Among the necessary ingredients are those involving acceptance of responsibility, the ability to base decisions on an objective knowledge base including the results of research, and the need to understand clearly the goals of the institution. Necessary, too, is the development of trust, institutional communication skills, and the mechanisms for maintaining continuous formal and informal communication links. For these reasons, successful implementation of the AOS concepts hinges on the appointment of a full-time planned change specialist and upon the commitments of the president, the other senior administrators, and the governing board to the system.

The concept of the Educational Development Officer (EDO) is based on several premises:

1. planned change and the planned change specialist are amenable to the environs of institutions of higher education;
2. organization development and management science techniques are generally applicable to colleges and universities;
3. because of the magnitude and diversity of responsibilities of the typical college president and his senior administrators, they need assistance in taking advantage of these disciplines in carrying out their functions and responsibilities;
4. the quality of administrative and educational operations should improve considerably if

important institutional decisions are research-based and are supported by knowledge of the results of pertinent experiences elsewhere;

5. when new technologies, such as computer-based systems, are used, it is essential for someone in the administration to be knowledgeable about developments in this field; and
6. change, whether initiated from within or from external sources, is most likely to succeed if strongly supported from the top.

Problems with the Title

Certain problems are inherent with the title "Educational Development Officer" that need to be addressed early in the discussion of his role. Earlier Laboratory literature used the term "Officer" and this term has been continued although both the literature and the interviews point out some risk of miscommunicating. The term tends to connote authority based on the bureaucratic structure rather than authority based on expertise. Since the role is perceived clearly as a staff function, rather than a line function, terms such as staff specialist, special assistant to the president, or coordinator of planning emphasize the professional-technical role that should be given paramount consideration. Where possible, the title should connote high status, expertise, and access, without the implication of authority over people or decisions. Consequently, in introducing the EDO concept, a position title should be agreed upon as appropriate to the institution and to

individual preferences. The key, of course, is in the assignment of well-defined functions, rather than the title.

Management Consultants As EDO Prototype

Earlier characteristics of highly professional change-agent roles were discussed based on the literature, and it appears that the management consultant comes nearest to the ideal of a knowledge-based, professional, planned change specialist. It was stressed that the management consultant ranked high on three essential characteristics, namely:

1. Mandate. A commitment by the institutional officers to the full use of the consultant's professional skills in key areas of organizational life.
2. Expertise. A broad and deep knowledge base for all major interventions. This trait is reflected in credentials and proven accomplishments. It is reflected in an up-to-date grasp of the exploding array of change strategies, disciplines, and specialties.
3. Status and Autonomy. The role of the external management consultant is highly respected. He is not a subordinate in the usual sense. While only partially accountible for institutional results, his professional judgment on matters of implementation and technique is respected.

While the "mandate", and the "status and autonomy" characteristics of the management consultant might appear to dilute managerial authority, they actually promote two specific outcomes: (1) the strengthening of the ability of the senior line officers to manage the future of the institution and (2) the strengthening of the flexibility of the entire system and the interrelationships between and among the parts. The management consultant prototype, unaltered, is not suggested as a model for institutions of higher education. The prototype simply provides some clarification of the essential features of the role of a professional planned change specialist.

EDO Role Model

Institutions of higher education are so diverse in governance, organizational structure, and operating procedures that maximum flexibility must be allowed in formulating an EDO role model. Factors such as size, complexity of the organization, and the level of involvement desired by top administration must be taken into consideration. Also, the administration of some institutions will be ready to introduce the entire concept immediately, while others will prefer to introduce only partial aspects.

The EDO role envisioned here will be more likely in institutions facing rapid environmental change. It will be more likely if the president and other senior administrators are sophisticated managers, as defined in the literature of the past 15 or 20 years, and foster such ideas as team building,

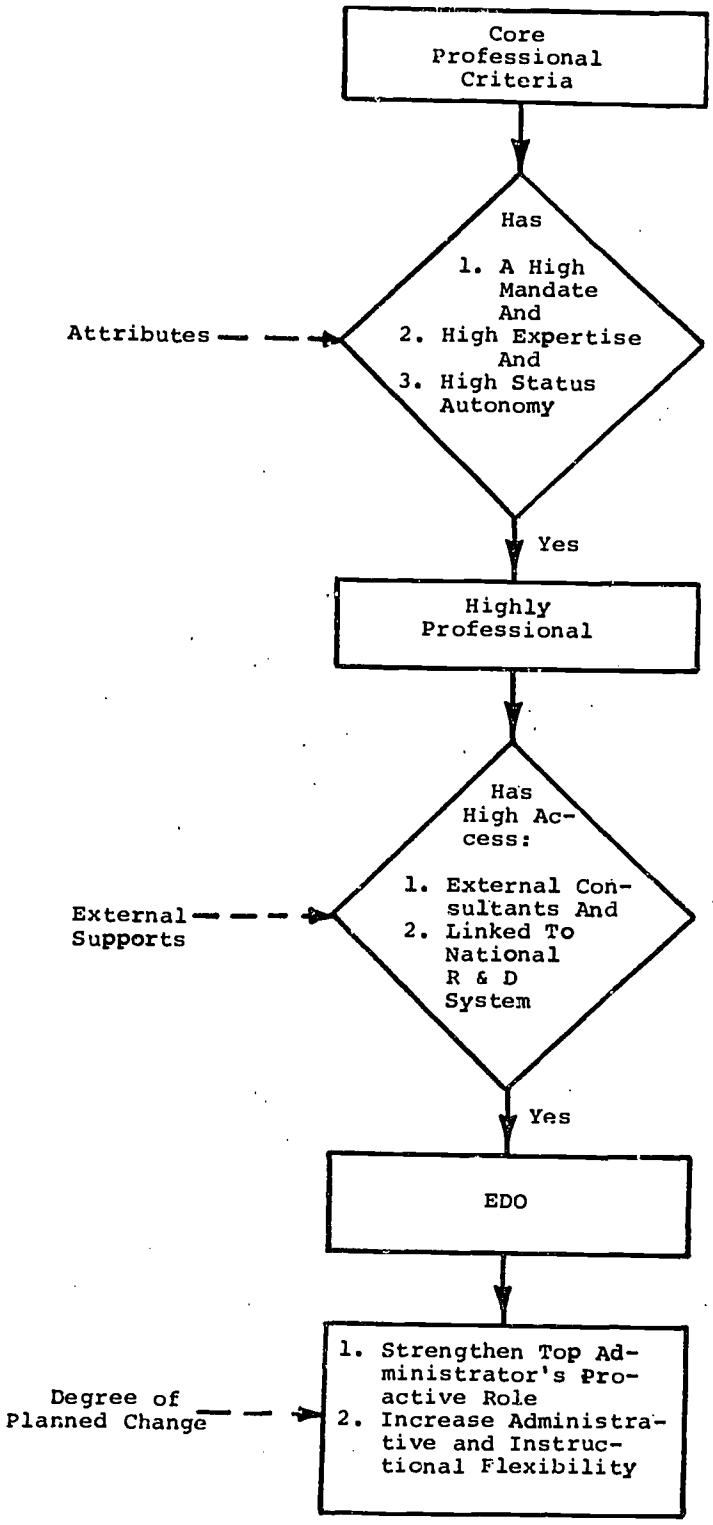
delegation of responsibility, and increased competence in interpersonal relations. It will be more likely if leaders of the institution are acutely aware of major incentives for planned change, appreciate the applicability to higher education of specialties in organization development and management science which have been used extensively in other societal arenas, and if they are anxious to use planned change technologies and concepts.

Figure 1 depicts the proposed EDO role model. The primary classification is based on the three core professional attributes derived from the management consultant prototype. A related basis for classification is the presence of a senior external consultant, who is used both prior to actual installation to diagnose and plan the applicable role model, and as a continuous resource person. In addition to the external consultant, the EDO is linked to national innovations, both within and outside higher education. He will tie himself especially to educational laboratories and other research and development centers.

Figure 1 assumes a high correlation among the three professional characteristics, the two external supports, and the two projected outcomes - the strengthening of top administration's proactive role and increased administrative and instructional flexibility. Unless an EDO has superlative expertise, he will not or should not have high mandate and status-autonomy. Unless he is highly professional and has external support he will not be a significant factor in strengthening top administration or increasing institutional flexibility. An institution may choose levels of involvement for the EDO role, but it is difficult to

Figure I

EDO Role Model



have some elements of the model without the others.

Later sections will discuss background, training, role, and functions, but in briefest terms, the EDO role is likely to be introduced formally, with board approval, comparable to the introduction of a curriculum development plan. By training and background, he is likely to aspire to a national career in planned change and to have advanced training in applied behavioral science and consultant skills. The EDO role probably would require faculty and administrative experience, he would possess expertise and specialized training in the proposed change specialist role. The reference group of the EDO is likely to be other EDO types. He probably will not have hierarchial ambitions. An assignment to a top level administrative position within the same organization is probably undesirable. In most cases he will see his planned change specialist role as a stepping stone to a high-level administrative position in some other institution. He will see his role as comparable in status, pay and influence to top administrative roles and he will see his EDO role hopefully as a better use of his specialized professional talents.

Administration and Instruction as EDO Target Areas

In the AOS approach, the EDO is equally appropriate in both the area of administration and instruction. In administration, the EDO will focus on administrative and organization systems. For example, planning functions, decision-making, institutional research, information systems, institutional goals and objectives, and organizational structures are stressed. In the instructional area, the EDO focuses on learning resources,

instructional systems, curriculum and academic program development.[8] Administrative and organization development and instructional development have a high degree of overlap and the mandate and expertise of the EDO could include both areas.

Introducing the EDO Role

An institutional precondition for introducing the EDO role is the realization by the senior line administrators that a planned change specialist is needed. This fact assumes a perceived need for institutional change and a desire to utilize new knowledge and professional skills to bring it about. Without these preconditions the role of the EDO is not viable. The process of introducing the EDO role should test and strengthen the system's ability to utilize the skills of planned change specialists. If the system is not ready to undertake a planned change effort, it will save time, money, and energy to realize this at the beginning. Consequently, it is recommended in the AOS approach that systems take great care in assessing this readiness, even to the point of using outside consultants before committing resources to actual implementation.

Stages Suggested for Introducing the EDO

The suggested process for role introduction includes eight stages:

1. exposure of top administration to the EDO role and to the concepts and techniques of planned change;

[8]See Roueche & Boggs, 1970.

2. preparation of a plan, hopefully with the help of outside consultants that includes the extensiveness of the EDO role, its area (administration, instruction, or both), diagnosis of the particular planned change issues of the institution, and the identification of potential pitfalls;
3. governing board approval of the general plan, along the lines of a typical college development plan, with assurances that they understand the purposes and some of the more important concepts of planned change as proposed by the knowledge base of management science and organizational development;
4. appointment of an EDO, allowing time for pre-service training to provide the necessary range of knowledge and skills, especially in the applied behavioral sciences;[9]
5. initial diagnosis and entry which requires the building of four support groups: (a) the president and his senior administrators; (b) a colleagueship with an external planned change consultant; (c) a resource team of internal technical resources, e.g., faculty members with competencies in research, management science,

[9]Training associated with the EDO role covers both pre-service and in-service needs. It is unlikely that very many persons can be found with all of the prerequisite skills. Therefore, both pre-service and in-service training are assumed be necessary.

and organization development; and (d) supportive constituency for planned change in the faculty *via* an informal communications network;

6. first major intervention which should be in the area most urgent and most amenable to the use of planned change resources and with the greatest chance of success;
7. role consolidation (planning and evaluation) established and clarified with appropriate persons; and
8. further interventions as part of a continuous institutional renewal process.

Table III represents the stages of the EDO role introduction in diagrammatic form with a suggested time flow.

EDO Responsibilities

Up to this point the intent has been to clarify the core professional characteristics of the EDO and the ideal introduction process. Great emphasis has been placed on generic processes such as the retrieval and utilization of knowledge, data-based interventions, and organization development. Less emphasis has been placed on specific program innovations. The generic functions, however, clearly go beyond the usual technician or assistant role. For example, the research and knowledge roles go beyond tabulation and narrative reporting, beyond technically competent responses to requests for data collection, and more into diagnostic analysis, strategic system-wide studies, and initiated studies or experiments. Moreover,

Table III

Ideal Stages of EDO Role Introduction

Time Flow	6 Months Pre-EDO			2 Years of EDO Operation				
Probable Time of Year	Winter Spring			Spring Summer	Summer Fall	Fall Winter Spring	Spring Summer	Fall Winter
Stage[1]	Exposure and Interest of Top Administration	Plan For Introduction	Governing Board Acceptance of Plan	Appointment of EDO	Initial Diagnosis and Entry	Initial Intervention	Consolidation, Planning, and Evaluation	Further Interventions
Planned Change Specialist Roles	External Consultants			and R & D Centers, e.g., NLHE[2] EDO and other Internal Technical Resources				

[1] Stages overlap - a subsequent stage is beginning while the present stage has passed its peak.

[2] Tied together if R & D Center, e.g., NLHE, provides consultant resources.

there will be wide institutional variations depending on such factors as the degree of commitment to planned change, the substantive areas of change, and the politics and structure of specific institutions.

Functions and Activities

In any event, the functions and activities of the EDO are likely to include the following:

1. an internal catalyst for change;
2. a link to national technologies, innovations, and research and development systems;
3. a resource to those engaged in institutional planning and decision-making;
4. continuous research to improve institutional planning and decision-making;
5. a sensitivity to the changing demands in higher education;
6. familiarity with the professional literature and data sources for monitoring innovative developments in higher education;
7. the identification of promising alternatives to current practice;
8. a resource and communications link to the president and other senior administrators;
9. a resource to those responsible for clarifying institutional goals;

10. the monitoring of progress toward institutional goals;
11. assisting in deriving measurable objectives for the institution;
12. training and technical assistance for management development;
13. mediator in various conflict situations;
14. a question-asker and an idea stimulator;
15. the initiator of the development of management information systems;
16. assistance in maintaining an effective internal communications network;
17. coordination of the institutional research efforts;
18. the encouragement of knowledge utilization in the decision-making process;
19. membership on long-range planning committees or teams;
20. a resource to various task groups and other _ad hoc_ committees;
21. a disseminator of internal innovations; and
22. a creator of appropriate institutional renewal mechanisms.

The external consultant should be helpful to the EDO in working with the president and his senior administrative officers to define and redefine the EDO functions. Although the functions will vary from institution to institution, and from time to time, this variation should be based on professional analysis and

procedures for maximizing planned change in the institutional setting. In one institution, for example, the tabulation and reporting of certain kinds of data can bring about major planned change. In another, basic organization development approaches might well be the most appropriate strategy.

Necessary Knowledge and Skills

To accomplish the foregoing tasks, the EDO must possess certain knowledge and skills and must have adequate resources available to him. He should either be responsible for, or have full access to, the Office of Institutional Research or comparable research assistance as well as to data processing services. He should develop some expertise in organization development, management science techniques, evaluation, and in facilitating the processes of communication among people. He should also be wise in the judicious introduction of new kinds of data into the operations of the institution.

The EDO should be familiar with the major issues confronting higher education in general and his institution in particular. He should be familiar with the process of developmental planning and decision-making. He should have the skills and resources required to draw upon relevant information from the literature and the latest research and experimentation done elsewhere. Finally, the EDO should have a thorough knowledge of an accepted long-range planning process for colleges and universities.

An EDO Profile

Because this approach is new, it is difficult to provide a tested personal and professional profile of the EDO. It is

necessary, therefore, to proceed by hypothesizing and testing certain conditions and traits which are seen as necessary for the successful performance of the EDO role. Among such conditions or traits, the following are of special import:

1. he views the institution as a social as well as an academic community;
2. he is committed to organization development and management science approaches to the administration and organization of institutions of higher education;
3. he is respected by his colleagues in both the faculty and administration;
4. he possesses a substantial amount of ego-strength;
5. he understands and appreciates the difference between line and staff functions, and is tempermentally suited to a staff role;
6. he is committed to the idea of constructive innovation;
7. he has time (released if necessary) for development and planning activities;
8. he has ready access to institutional resources (both material and personal);
9. he is committed to the institution;
10. he has the confidence and support of the president;

11. he has the ability to relate effectively to people;
12. he has meaningful experience, in both teaching and administration, and the necessary academic credentials;
13. he has training in applied behavioral science;
14. he has a supportive professional manner in times of change, especially in relationship to the president and other senior administrators;
15. he has an understanding of quantitative data, but uses it appropriately in a human and social context and in relation to institutional goals and objectives;
16. he has farsightedness in pursuing institutional change, but resilience in the face of complexity and apparent failure; and
17. he has ability to start things without the need to continue ownership and control.

The core professional characteristics of the EDO do suggest general characteristics. The broad change mandate and the professional status and autonomy characteristics demand a high-trust relationship with senior line officers and a deep professional commitment to the health of the institution. The expertise role requires a knowledge orientation as contrasted to a power and authority orientation - relying mainly on the quality and relevance of professional knowledge. This suggests a minimum of hierarchical ambition and a minimal tendency to use the access to knowledge and to senior officers as bases

for pursuing private agendas. Accuracy of perception and communication are particularly important in maximizing the role of professional expertise. Role felxibility and role-sensitivity are important. Although the list is demanding, persons with these characteristics are available - perhaps more so than persons with all the ideal characteristics of a college president.

Availability of Potential EDOs

Until the EDO role emerges as a realistic career possibility, the EDO most likely will be a former faculty member. This background facilitates his access to and respect from faculty. Since his previous work is well known on a first-hand basis by administrators, such a background enhances the prospect of a meaningful working relationship.

When a faculty member assumes the EDO position and if he does not already have the requisite skills, it is important that he undertake extensive pre-service and in-service training, especially in applied behavioral science and consultant skills. It is likely that the most effective EDOs will aspire to a highly paid national career in planned change. The more universal and cosmopolitan professional skills and credentials will loom large as compared to local, intra-institutional affiliations and career factors. The primary reference group of the EDO will tend to be others in EDO-type roles. As the role gains acceptance in higher education there will be more mobility not only within higher education but among institutions of higher and other types of institutions, especially industry and government.

Operational Issues

Two special areas need to be examined in relationship to the successful implementation of the AOS type EDO. One is his place in the organizational structure, and the second is the environment needed to accommodate his new position.

Place in the Organizational Structure

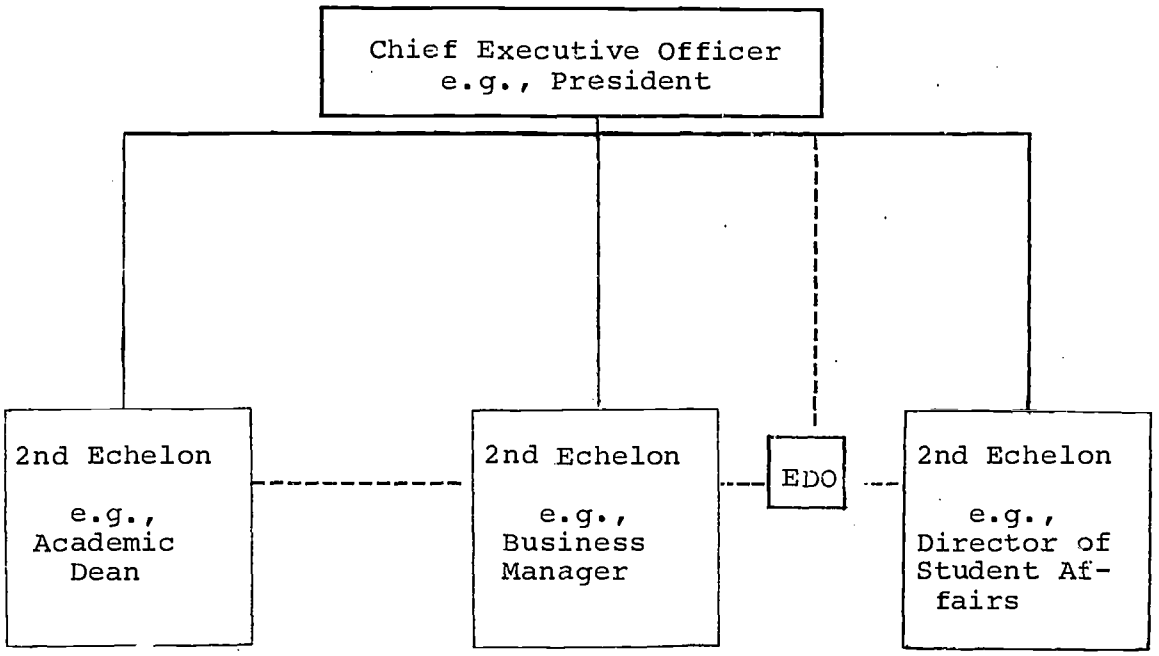
The non-hierarchical, non-authority based nature of the EDO has been emphasized. Yet, it is important that his activities be coordinated with and have the support of the top administration. This requirement suggests that he report to the chief executive officer on his campus, namely, the president, and that he be in a close collaborative relationship with the other senior administrative officers. Above all, however, he is a staff specialist and, following the consultant prototype, does not function in the same manner as the line subordinates.

Terminology is very important in this relationship. The EDO consults with senior officers more than he "reports to" them; he is a "catalyst" more than an "assistant"; he works "with" more than "through" line officers; and he "initiates" and "coordinates" more than he "directs." In any event, his place in the authority structure is not as important as his role in complementing the existing line structure and providing creative knowledge inputs from a position somewhat independent of the hierarchical "chain of command." It must be stressed, however, that the role of the EDO is not intended to alter the existing organizational structure, but rather is an addition to it.

Figure 2 illustrates the staff relationship.

Figure 2

Place of EDO on the Organizational Chart



Environment Needed

A general environment favorable to constructive change must be established if a catalyst such as the EDO is to perform successfully. There should be widespread commitment to finding better solutions to problems, based on the following assumptions about institutional climates favorable to constructive change: (1) that trustees, administrators, faculty, and students all have legitimate roles in the planning and decision-making processes of the institution; and (2) that trustees, administrators, faculty, and students can participate

cooperatively in the development and improvement of the institution.

Evaluation

Any new program or approach such as that represented by the EDO should be evaluated. Yet, it is difficult to measure with any degree of certainty the amount of institutional advancement directly attributable to the EDO. One reason for this difficulty is the fact that the extent of his accomplishments will depend on whether the climate is conducive to change, or on the degree to which he and his colleagues can make it so. Another reason is the elusiveness of change in terms of quantitative measurement.

Since the effective EDO is a staff facilitator, and the line administrators maintain major accountability, it is particularly difficult to distinguish the impact of effective EDO performance from the impact of effective line administrator performance. As previously discussed, key outsomes are (1) strengthening the proactive administrative role and (2) increasing institutional flexibility. When there are significant gains in these areas and an EDO is operating, it is believed that he is a major factor.

A key element in evaluating the EDO is documentation of EDO diagnosis, interventions, and key decisions points. Although primarily non-quantitative, such documentation is effective in evaluating the impact of the EDO, in planning for future roles, and in defending the practicality of the EDO. At the quantitative level, it is particularly important to

collect baseline data (on perceptions, expectations, and institutional patterns) just before the EDO role is introduced. Such data on the prior state of the system can be useful in evaluating the effectiveness of the over-all planned change effort including the EDO role.

Summary and Conclusion

The idea of a senior-level, highly professionalized role in institutional change has not been proven in higher education. This monograph has explored the idea and made suggestions and recommendations based largely on general principles of planned change and educated guesses of administrators and experienced specialists (e.g., in organization development and management science). The role of the EDO is not the only, or even the major, source of change in higher education. It is, however, one of the major potentials for planned change - anticipatory change, management-sponsored, from within the institution. The introduction of the EDO role should be given serious consideration by senior administrators, especially presidents who want to create institutional renewal mechanisms and increase the effectiveness of planning and decision-making in their college or university. The introduction of an EDO, as described in this monograph, will entail institutional costs and risks, but, it is believed, less than the costs and risks of other major options open to them. The EDO role promises to make a major contribution to institutional improvement.

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APPENDICES

Appendix A

The Role of the Educational Development Officer
Structured Interview

The following interview was conducted either by telephone or in person with the participants during April-May, 1971. The definitions given of planned change and the Educational Development Officer were general in order to allow wide latitude for responses.

Background of Respondents

(1) What are the characteristics of your institution (for example, location, size, student clientele, type of faculty, general environment)?

(2) What is your present position in your institution?

(3) What degrees do you hold?

(4) What is your specialized field?

(5) What other positions have you held in this college or other colleges?

The Planned Change Process in Higher Education

Prior to the discussion the following definition of planned change was given to each participant: Planned Change: Management sponsored, based on scientific knowledge, by a formal professional change agent, and productive of change.

The particpants were then asked to respond to the following questions.

(1) What need is there for planned organizational change in higher education?

(2) What are the major barriers to planned change in higher education?

(3) What is the potential role of applied scientific knowledge in bringing about change in higher education?

(4) What are the possibilities and what are the limitations of the president, provost, dean, or other top line officers as agents of planned change?

The Educational Development Officer

Prior to the discussion the following definition of an Educational Development Officer was given to each participant: EDO: A formally delineated specialist in planned change, based on utilization of scientific knowledge, and sponsored by top management.

The participants were asked to respond hypothetically if no such role currently existed in their organization and, if such a role did exist, to respond in relation to this person. The following questions were posed.

(1) What would you perceive to be the role and function of an effective EDO at your institution?

(Questions 2, 3, and 4 were asked of administrators only.)

(2) What title would you suggest for an effective EDO type?

(3) What would be the job description of an EDO?

(4) What would be the EDO's place in the organizational structure?

(5) What would be the personal characteristics and career patterns of a successful EDO?

(6) What would the relationship be between the EDO and other positions, e.g., institutional research office, development office, computer services, planning office, president, dean, and any other specialists?

(7) What relationship would the EDO have with the faculty?

(8) What do you think the steps would be in the process of establishing an EDO role?

(9) List several examples of projects the EDO could undertake, being as specific as possible. Give concrete examples of what the hypothetical EDO could do, or, if there is someone who approximates the EDO role on your campus, what he is doing.

Open Discussion

Before concluding the interview, the participants were asked whether or not there were pertinent questions that they would like to discuss which were not raised.

Appendix B

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