Managing change.

Janet Vaughan. Danley

The University of Montana

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MANAGING CHANGE

by

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CHAPTER I
INTRODUCTION

All living entities must change to survive, including organizations of higher learning. While undeniably cliched, this expression represents reality. Change may be a result of a number of factors. It may be self-initiated, imposed by external authority, or in response to both internal and external forces impinging on the organization; but whatever the source or reason, change is inescapable. Therefore, it is in the entity's best interest to be open to organizational change in order to maximize its potential for survival into the uncertain future.¹

At the heart of any effective change management strategy is a plan of action which will ensure institutionalization or acceptance of inevitable or desirable change. That plan of action includes contingencies for coping with the special circumstances of change, for overcoming obstacles to the implementation of change, and for living with the eventual outcome of the change since a change of any magnitude will affect all aspects of the organization if the organization is viewed from the perspective of the systems theorists. To arrive at a plan of action, the administrator should be keenly aware of elements of the organization's character. These elements include the organization's culture, the internal

climate, and the external environment. Strategies for implementing change are shaped and influenced by these factors.

The most successful strategies and tactics for the introduction and implementation of change will be congruent with the organization's culture. Although an analysis of organizational culture is beyond the scope of this paper, it is a given that organizations posses unique "personalities" that influence their behavior in the face of change. To use strategies not compatible with the organization's culture significantly lessens the possibility for success or for the institutionalization of the proposed change.\(^2\) Not only is acceptability of the change itself dependent upon the organizational culture, but also the processes facilitating the change's implementation. According to Edgar H. Schein, organizational culture not only limits the strategic options available for change processes, but strategies cannot be implemented if they run counter to powerful cultural assumptions.\(^3\) It would seem only logical, then, that the change agent carefully analyze and note the cultural characteristics of the organization.

The internal and external environments in which the organization functions also strongly influence how change is confronted and implemented within the organization. Unfortunately, these environments are themselves not static during the change process, causing the need for constant monitoring and frequent alteration of the change process in order to reflect the ever-changing environment. The status or condition of the


environment will influence the acceptability of the change and the rate of implementation. For example, if the internal and/or external environments are turbulent and associated with a high level of uncertainty, organizational members may perceive change as a threat to the organization's existence. A more placid environment may cause the organization to be more accepting of change.

Organization members may resist change even though there are demonstrated benefits to be gained through change or change is imposed by an external authority. Alvin Zander, in his article "Resistance to Change -- Its Analysis and Prevention," postulates that resistance to change is a result of several factors such as lack of understanding of the purpose of the change, a lack of involvement of those affected by the change in the planning and implementation phases, or poor communication. Strategies developed to counter resistance determine, in part, the success or failure of the proposed change within the organization. Jonathan I. Lange has determined that, in fact, it is an unwise change agent who does not seek out resistance, determine its causes, and publicly respond to the manifestations of the resistance. The response is not to be from a defensive posture but more as a method of reducing the influence of the resistance and placing it in a perspective that will not imperil the change. Lange also argues that by exposing the resistance, group or peer pressure will be brought to bear on the resistors.

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effectively isolating and neutralizing those who would sabotage the change and change process. 7

Management of change, the subject of this paper, is discussed from the vantage of a case study of two institutions, the University of Montana and Northern Montana College, embarked on the institutionalization of a major change, the transition to a semester calendar from a quarter calendar system. The goal of this paper is to review the processes of change at these two institutions in light of the conceptual framework of change management presented in the literature. A discussion of the strengths and weaknesses of the strategies and tactics employed at the institutions are included in the case study chapters. A brief discussion of a possible management plan for change follows the case studies. The paper will conclude with an evaluation of the management of change to the semester calendar at each institution and with suggestions for effective management of future changes.

**Review of Selected Literature**

A significant body of literature has emerged over the past several decades concerning the management of change. Research interest has focused on several aspects of change management including the change agent; the strategies and tactics employed in the introduction, planning and implementation of change; predictors of acceptance and institutionalization of change; and the organization's behavior in the face of change.

Paralleling the research of change management in private and corporate business organizations is a similar examination of the change process in institutions of higher education. Early authors, such as J. O. Hertzler and David Reismann, revealed through

their research that change at many educational institutions was largely efforts to imitate the type of changes successful at other academic institutions, especially large and very prestigious institutions. More recently, interest has shifted to an analysis of the causes of change, how change agents accomplish the goals of change, and methods of implementation. Although not specific to education, the research done by Gerald Zaltman and Robert Duncan and by Warren Bennis et al, detailed the change process in a comprehensive manner. They identified strategies that could be applied to higher education as well as other public and private sector organizations.

The result of recent research in change management has made significant contributions to the understanding of organizational change. One such contribution, Managing Academic Change, by S. V. Martorana and Eileen Kuhns, provides keen insight into the processes of change in twenty academic institutions. The authors and the respective change agents describe the innovations being implemented at these twenty institutions. From these case studies, the authors extract a number of strategies and

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tactics for the successful implementation of change. "Low-profile action," is described by the authors as a strategy that de-emphasizes the importance of the change and instead focuses on the similarities between the change and the traditional modes of operation or status quo. Another strategy, called "creation of demand" by Martorana and Kuhns, requires the change agent to encourage supporters of the change to call for action, that is, the desired change, to respond to a particular set of circumstances or conditions.\(^\text{12}\)

Martorana and Kuhns caution that no one strategy and set of tactics will be applicable to all situations. They state that each strategy must be congruent with the particular change, with the environment of the institution, and the prevailing circumstances leading to the change.

In the concluding chapters of *Managing Academic Change*, Martorana and Kuhns provide some prescriptive guidelines for those attempting change in a college setting. The authors define a strategy as being the overall plan of action for achieving a goal, and tactics as the specific actions taken to implement chosen strategies.\(^\text{13}\) Suggested change strategies include low-profile action, systematic experimentation, participant involvement versus power coercion, creation of power blocs, and control of communication. Tactics include appreciation of timing, obtaining an overview, determining obstacles, avoiding rejection, persuading the opposition, selecting personnel for decision-making positions, and providing reassurance.\(^\text{14}\) Martorana and Kuhns complete their discussion with the development and explanation of what they call their "interactive forces theory."\(^\text{15}\)

\(^{12}\text{Ibid., 164-167.}\)

\(^{13}\text{Ibid., 163.}\)

\(^{14}\text{Ibid., 164-172.}\)

\(^{15}\text{Ibid., 173.}\)
The interactive forces theory classifies forces for change as "personal, extrapersonal, or goal hiatus" forces. The personal force is of three kinds: decision makers (people influential in the institution and its environment); implementors; and consumers. Extrapersonal forces are tangible objects such as facilities, land, and equipment, and intangibles are policies, traditions, trends, and laws. Goal hiatus is the gap between the desired goal and the achievement of the goal. Through the application of this theory, managers of change can evaluate the progress towards a particular change, monitor how well particular tactics and strategies are working, predict the possible outcomes of the tactics and strategies with respect to the factors impinging on the change, determine when the change is at risk, and devise remedial action to save the change.16

The model or theory of change management utilized in the planning for change provides a framework the administrator or change agent can use to develop strategies and tactics for the implementation of a particular change. The strategies derived from the model are determined by circumstances as much by the change to be implemented. Circumstances in which the organization finds itself can both assist and hinder the effectiveness of the strategies and tactics selected to implement the change. Therefore, a thorough understanding of the history of events that occurred internally and externally to the organization preceding the change will assist the administrator in developing an effective plan of action.

This level of understanding is also important when analyzing the change implementation strategy. To assist the reader in understanding the nature of the particular change under study, that is, the conversion to a semester system, and to provide a setting, the information provided below briefly describes the events and conditions the

16Ibid., 173-196.
Montana University System was confronted with prior to the adoption of the semester calendar policy.

**Background**

The Montana Constitution, ratified in 1972, gives the Board of Regents complete oversight and control of the six institutions which comprise the Montana University System. The University System is tied to the other branches of state government through various means. The Legislature retains control over the appropriation of state general fund monies needed for the operation of the System. The Legislative Fiscal Auditor's office retains audit authority over the System. The Governor appoints, with Senate approval, the members of the Board of Regents. However, the intent of the Constitution was to remove, as much as possible, the University System from partisan political pressures in determining the course and direction of the University System.\(^{17}\)

Mindful of their constitutional authority and responsibilities, the Board of Regents began preparing for the 1987 Legislative Session during the spring and summer of 1986. A brief review of the events and the political atmosphere in the months preceding the 1987 legislative session is necessary for an understanding of the actions taken by the Board which ultimately resulted in the decision to adopt a semester calendar.

Declining student enrollments, high rates of faculty turnover due to low salaries and poor work conditions, and a perceived decline in quality of some academic programs were significant problems internal to the system with which the Regents had to grapple. These internal problems -- plus escalating taxpayer displeasure with high levels of property tax revenue --...
taxes, the increasing size of state government, and widespread criticism of the large university system -- strongly influenced the Regents to seek dramatic solutions.

Consequently, during the Regents' Yellow Bay Retreat in October 1986, attended by the System's six institution presidents, the Regents requested that the presidents and Commissioner of Higher Education, Carrol Krause, undertake a study to examine alternatives and solutions to the problems of the University System. Arising from the study and work done by the Commissioner's staff were the recommendations presented to the Board of Regents at their November 1986 meeting. Included in the recommendations was a semester calendar proposal. The Board of Regents accepted this proposal and other recommendations between December 1986, and January 1987.

Subsequent to the adoption of these recommendations, the four institutions (University of Montana, Montana State University, Eastern Montana College and Northern Montana College) which utilized the quarter calendar system were directed to begin the process of change necessary to implement a semester calendar. This present study considers the initial and subsequent actions taken by Northern Montana College and the University of Montana to implement the Regents' mandate.

The response of these institutions to the mandate varied. Deputy Commissioner for Academic Affairs, Robert Albrecht, said initial reactions ranged "from noisy anger in some quarters, to obvious delight at other institutions." Albrecht's assessment was based on observation after the fact since he had not begun his tenure with the University System until after the semester calendar policy had been adopted. However, in
Albrecht's opinion the mood on most campuses by the summer of 1988 was "acceptance at the very minimum."\[^{18}\]

The academic vice presidents at Northern Montana College and the University of Montana were more cautious in their assessment of the acceptance of the policy change. Vice President Jerry Brown of Northern Montana College stated that the process of transition was being played out at Northern Montana College, but there remained confusion and uncertainty among Northern's faculty over the purpose of the transition to a semester system. For example, many of Northern's students with agricultural ties would be adversely effected by a semester calendar, and some would be forced out of attending college altogether.\[^{19}\] Donald Habbe, Vice President and Provost of the University of Montana, stated that by charging the University's Semester Transition Committee with much of the responsibility for the transition, some of the faculty's anger and frustration could be channeled into the curricular changes necessary to go to a semester system. He stated, however, that the "Board (of Regents) had muddied the waters by sending out lots of conflicting signals on the purpose of this switch."\[^{20}\] However, Habbe and Brown stated that their respective institutions are progressing toward transition, although many questions and issues remain unresolved.

\[^{18}\text{Robert Albrecht, Deputy Commissioner for Academic Affairs, interview by author, 10 January 1989, Helena, MT.}\]

\[^{19}\text{Jerry Wayne Brown, Vice President for Academic Affairs, Northern Montana College, interview by author, 11 January 1989, Havre, MT.}\]

\[^{20}\text{Donald E. Habbe, Vice President and Provost, University of Montana, interview by author, 13 January 1989, Missoula, MT.}\]
Statement of the Issue

Change is inevitable, or should be considered so. However, not all changes are successfully woven into the fabric of organizational life. The underlying premise of this paper is that without sound planning and management of the change process there is less likelihood of successful institutionalization of the change.

The inevitability of change is at the root of the adoption of the semester calendar for the Montana University System. It is the challenge of planning for and managing the change that confronts the two campuses analyzed in the following case studies. From preliminary observation and discussion with key individuals at each campus, it would appear that both institutions are employing specific strategies and tactics in the planning and implementation of the semester calendar. There are, though, significant differences in the methods employed by the institutions, and it is the purpose of this paper to analyze the methods in terms of the concepts and theories presented in the literature.

Information for the case studies comes from a review of pertinent documents, for example, committee proceedings, newsletters and newspaper articles, and memos to campus personnel; from interviews with faculty, staff and administrators at each campus; and, from replies to questionnaires sent to faculty members at each campus. The information for the paper was collected during the 1988-1989 academic year.

Because the semester calendar will not be in effect until the fall of 1992, the analyses contained in this paper are "snapshots" of the process rather than a "movie." Strategies and tactics of change continue to evolve at each campus as the context changes, as

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additional information becomes available, and as the process gains the momentum that comes from acceptance and awareness. Two years of the process of change to a semester calendar system have elapsed. This process has thus far resulted in many hours of work and many pages of documentation. It is these efforts that are analyzed in chapters II and III.

The remainder of the paper is divided into two chapters. Chapter IV will present a management strategy model which may be of some value in planning for future changes. Those successful aspects of the change process at the Northern Montana College and University of Montana campuses will be incorporated into this model. Recognizing that no one model will suffice for all circumstances, it is hoped, nonetheless, that this model will be a practical guide in the planning and management of change. Chapter V, the paper's conclusion, will offer a brief synopsis of the case studies followed by a discussion on the feasibility of imposing a management model on change processes.
CHAPTER II
A CASE STUDY OF THE MANAGEMENT OF CHANGE AT NORTHERN MONTANA COLLEGE

Historical and Contextual Perspectives

To gain an accurate understanding of the processes of change in an organization, one must first know and appreciate the circumstances from which the specific change arises. In addition, an awareness of the organization's history is helpful when evaluating the organization's present behavior. Therefore, with regard to the study of the processes of implementation of a semester calendar in place of a quarter calendar at Northern Montana College (NMC), an historical and contextual briefing provides a backdrop for the analysis of the current change processes.

The history of Northern Montana College, first named the Northern Montana Agricultural and Manual Training School, begins with its creation by the Thirteenth Montana Legislature in 1913. However, no appropriation was made for its operation until 1929, presaging the fiscal difficulties that would continually haunt the institution. NMC is the only Montana University System baccalaureate-granting institution serving the northern part of the state. Due to its relatively remote location and a service area of approximately 34,000 square miles in one of the most sparsely populated areas of the lower United States, NMC has had to struggle to continue its existence against political
and fiscal difficulties. However, these struggles have been championed by a faculty and administration that can be described as independent to the point of "hard-headedness."¹

The faculty are assigned to one of seven academic departments, each headed by a chairperson. There are no academic deans in the institution; consequently, the chairs have assumed many of the administrative duties and responsibilities typically assigned to a dean. The chairs, nominated by the faculty members within their respective departments, are selected by the academic vice president for a three-year term. The chairs report to the academic vice president and serve as a communication link between the faculty and administration.²

The department chairs meet in council with the academic vice president on a weekly basis during which most curricular, personnel, and other administrative issues are discussed and decided. This council of department chairs is the academic administrative policy-making body for the institution. The chairs, in turn, meet with their faculty on a regular basis to disseminate information to the faculty, seek their opinions, or initiate discussion on curricular and other academic matters.

Other standing committees of importance in terms of policy-making are the Faculty Senate, Curriculum Committee, and Administrative Council. The Faculty Senate serves as a forum for discussion of a wide range of concerns and makes recommendations on policy issues on which the general faculty vote. The Curriculum Committee reviews and approves curriculum revisions. Following the Curriculum Committee's review the material is presented for the approval of the faculty body. Academic issues such as the

¹Northern Montana College, "Self-Study, Volume I" (report to Northwest Association of Schools and Colleges for accreditation evaluation, 1987), photocopied.

adoption of curricular revisions, however, are discussed and ratified by the general faculty before formal adoption and implementation. These votes occur during the general faculty meetings generally scheduled each quarter during the academic year.³

While not a faculty committee the Administrative Council, established by President William Merwin in 1986, composed of the institution's top- and mid-management personnel, discusses and adopts policy which can have an impact on the academic operation of the institution. The Administrative Council, however, was not brought into the semester conversion discussions, planning or implementation during the 1988-1989 academic year.

The faculty is represented by a collective bargaining agent, the Northern Montana College Federation of Teachers. While having a strong presence on campus, the union has thus far participated mostly in personnel issues such as salary and tenure matters and rarely involved itself in curricular or strictly academic issues such as the maintenance of academic quality of programs.⁴

Senior faculty members perceive the current and past administrations as having directive management styles. This group of faculty members believe the decision-making process on campus is somewhat arbitrary and that the opinion of the faculty is rarely considered when decisions must be made.⁵ However, the academic vice president, Jerry


⁴Ibid.; See also Northern Montana College, "Collective Bargaining Agreement Between the Montana University System and the Northern Montana College Federation of Teachers" (Havre: Northern Montana College, July 1, 1987), photocopied.

⁵C. Everett Pitt, Professor of Chemistry, Northern Montana College, interview by author, 16 December 1988; Michael J. Wojtowick, Professor of Vocational-Technical Education, Northern Montana College, interview by author, 23 March 1989; Charles Holmes, Professor of History, Northern Montana College, interview by author, 24 March 1989, Havre, MT.
Brown, states that, when possible, he prefers to talk to as many people as possible before making policy decisions.6

The Semester Conversion

The master plan

Following adoption of the semester conversion policy by the Board of Regents, the NMC executive administrators began preliminary discussions regarding strategy to implement the policy. President Merwin delegated the majority of the responsibility to the academic vice president. According to Merwin, the issue was primarily academic in nature. According to Merwin, there was little reason to involve other campus agencies such as student personnel services or housing and food services in the early stages of planning.7 There was an attempt to form an ad hoc administration/faculty union working group to address the related issue of faculty workload in the interim before transition and on a semester calendar. Representatives of the administration and the faculty union met three times to formulate the basis of discussion, but the union members, in an effort to express their disagreement with the semester conversion policy, boycotted subsequently scheduled meetings. After a time, the group was disbanded.

Following the demise of this working group, the academic vice president enlisted the assistance of the department chairs to address the curricular issues of semester conversion. The model developed would allow phased implementation of the semester curricula. Phase I consisted of the review and revision of all quarter course offerings and

6Jerry Wayne Brown, Vice President for Academic Affairs, Northern Montana College, interview by author, 23 March 1989, Havre, MT.

7William C. Merwin, President of Northern Montana College, interviewed by author, 2 November 1988, Havre, MT.
degree programs. Each course, with few exceptions, was revised so that it would carry either six or three quarter credits. The rationale for this approach was the ease of subsequent conversion to semester credits. The faculty members were also encouraged to reduce the number of course offerings, change degree requirements to reflect current academic standards, upgrade curriculum and degree degree requirements where needed, and incorporate current technology, especially computers, wherever possible.

Phase II consists of continuing curricular development, refinement, and revision within the 16-week semester calendar. The courses developed during Phase II are to be published in an academic catalog to be released during the summer prior to the 1990-1991 academic year. The lead time before Fall 1991, will allow students to become familiar with new course offerings and programs and seek advising in order to develop bridges between the program they are currently pursuing and the new semester program.

The date for implementation of the semester calendar is tentatively scheduled for the Fall of 1991. At that time, transcribed quarter courses for continuing students will automatically undergo a mathematical 2/3 conversion to reflect semester credits. The students will complete their degrees with semester credits.

It is anticipated that Phase III will be initiated during the 1989-1990 academic year. During Phase III all campus operations such as fiscal affairs, auxiliary services, athletics and intermurals, will participate in the planning for the semester conversion.

Communication of this three-phase plan to the campus community was not widespread and then only by word-of-mouth. The academic vice president attended

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In the interval between the early discussions on semester transition and the end of academic year 1988-1989, it was decided by Northern's academic vice president, Jerry Brown, to adopt the calendar developed by the University of Montana. That calendar calls for the implementation of the semester system in Fall 1992, with the start of the term scheduled for late August of that year.
department and faculty meetings during which he answered questions and explained the change process. The student newspaper published articles about the semester conversion process. The majority of the discussion regarding the master plan occurred in department chair council meetings.

**Analysis of Data**

Of the sixty-eight full-time faculty members and seven department chairs, a total of 52 Northern Montana College personnel were contacted for an interview or asked to respond to a written questionnaire. Similar questions were used for both methods (see Appendix A). Twenty-two individuals were personally interviewed, and thirty individuals were given the written questionnaire with twenty-four returning their responses. The combined response rate for both data collection methods was eighty-eight percent.

The questions used in the interview and on the questionnaire were open-ended and required narrative response. During interviews, follow-up questions seeking clarification and/or additional information were posed to the interviewee. There was no attempt to follow-up on responses to the written questionnaire. Once the questionnaire was received from the respondent, the respondents' names were removed, leaving only their official position attached to the questionnaire form. Anonymity, however, was not offered to nor requested by the respondents. With both methods, there was an attempt to phrase the question in terms of the individual's work assignment; for example, if the individual was a member of the Faculty Senate, the questions sought information from a senator's perspective. It was hoped that the perceptions of groups most involved in the change process could be obtained for analysis.

The purpose of the interview and questionnaire was to determine the respondents' (and/or the groups') level of awareness of the change process. Additionally, information
was requested regarding the mechanics of the semester conversion. In all instances, there was an effort to obtain the opinions of the respondent about the management of change on the campus. Each of the questions drew a variety of responses. Some respondents replied on a very personal level, while others chose to answer with respect to the group they represent. A description of the responses to the four questions follow with excerpts included to provide examples and clarification.

Question one asked the respondent to describe the reaction to the decision to implement a semester calendar system. Almost to a person, the initial reaction was negative. Many expressed regret that more thought was not given to the decision: "Those that made the decision had no background to do so." A number of responses indicate that reaction has been negative because few plausible reasons or explanations have been offered by the Regents or the administration for the adoption of the semester calendar: "I don't know why the switch is being made, and my sense is that no one else does either. That is the most difficult aspect to deal with" (emphasis added by respondent). The general opinion of those repsonding to the questionnaire and interview question appears to be that there was not enough consideration given to the issue; many respondents conclude that subsequent management of the issue did not improve that negative perception. This attitude is reflected in the resolution opposing the adoption of the semester calendar passed by the Northern Montana College Faculty Senate in the spring of 1988.

Subsequent reaction to the semester conversion, as described by the respondents, appears to be resignation. One response indicated, however, that some faculty members had begun to consider the change as an opportunity to revise curriculum and to introduce new course proposals. Many replies indicated that a high level of uncertainty remains a
problem. Some faculty are still not certain what is required of them in preparing for the semester, and one faculty member does not know "what my program is going to look like after everything is said and done".

The second question requested information regarding the conversion process and the respondents' role in the process. The respondents described the curricular revision process in preparation for the 1988-1990 catalog. That process required all quarter course offerings, with few exceptions, to be designed to carry either three or six credits. Most respondents recognized this as the first phase of curriculum revision in preparation for the semester system but they questioned the rationale for such a step: "It has to be mandated to change all classes to 3 & 6 credits so we can roll over to 2 & 4 semester credits. We just had to do it--no questions asked."

Most faculty groups felt that they had little control over the process: "We (the faculty) are told what is to take place and we are expected to do it." "I feel the charge (for planning the change) has been to department chairs." There is thus a feeling that the process has been planned by others and that individual faculty members have not been involved in developing the strategy for the change. Several respondents expressed concern that very little consideration had been given to other aspects of the college that would require significant modification and change in order to operate well under a semester calendar.

Question three asked for a description of the guidelines that had been furnished to accomplish the transition to the semester plan. The replies from Faculty Senators indicate that they were polled on acceptable calendars, that is, the start and end dates for the semester, however, there is confusion among the Senators on the Faculty Senate's final decision. One senator states that "A resolution was passed to go with the MSU
calendar," while another replied, "The NMC Senate adopted the U of MT calendar which has a late August start date." Faculty Union members' replies to question three indicate that the Union has chosen not to become involved in the conversion: "No input in the process whatsoever! This is not a union matter."

Question three responses indicate that senior faculty members share a concern that the guidelines provided to the faculty have been inconsistent and have not been clear. Many believe that NMC's administrators are being told by the Regents what to do and the institution has very little flexibility in developing a plan of change: "The mandate from the Regents was that class work had to begin at least right after Labor Day, if not before and the Administration has said to change all courses to 6 or 3 credit courses."

A description of the administration's role in the semester conversion process is requested in question four. These responses brought forth the widest possible range of answers and very obviously reflect the personal sentiment of the respondent towards the college's top administrators, in particular the president and academic vice president.

The president and vice president merely carried out the wishes of the Regents, according to several of those responding to question four. Others believed the administration was genuinely concerned and were attempting to make the first steps of the transition as logical and smooth as possible: "Our own administration here at NMC has been very helpful and considerate. Questions about changes that are unique to a department have been addressed promptly and helpful suggestions have been given."

These positive opinions are countered by those that describe the administration's actions in negative terms. Disagreement with revising courses to three and six credits appears to be the most controversial aspect of the conversion process and the administration's role to date: "I feel administration is not cognizant of the complexity of
the time and work involved in the conversion (to six and three credits) or the pressure this will exert on the teaching faculty." One respondent suggested that the administration has offered no leadership in the process and has been arbitrary in its actions: "The VPAA...absolutely insisted that his way would prevail. It was done by edict rather than through consensus with the faculty."

**Conclusions**

The usefulness of the data is qualified by several considerations. The responses to the written questionnaire and from interviews reflect, for the most part, only the personal and individual opinions of those responding. Another factor is the time interval between when events occurred and the opinion survey, which may have been up to two years. Consequently, faculty recall may have caused some inaccuracies in the responses.

The data, though, suggest some conclusions. One of the more serious problems is the lack of justification for the change to semesters. Many respondents mentioned that the change was unfair and unwise. The success of the change is clearly jeopardized by not addressing these feelings directly. Resistance to the change is much more likely to continue in the face of these feelings. Although it was not the administration's decision, the switch to semesters requires a full explanation by someone in contact with the local personnel. Neither the Regents nor NMC's administration, at any point in time, gave any detailed explanation why the decision to implement a semester calendar was made. This oversight, whether intentional or not, has been the major reason for the faculty's displeasure. A related issue, is the perception that there is no overall plan of accomplishing the transition and no clear goal to be achieved. Again, whether intentional or not, the informality with which the three-phased transition plan was discussed and publicized lent it little importance or credibility. The implication is that either it will not
work or the administration does not believe a semester calendar will become a reality at Northern Montana College. The administration has done very little to convey either the importance or urgency of the semester transition process.

It appears unquestionable that inadequate communication has plagued the conversion process to date. The faculty in general express frustration and uncertainty in regard to the process, the steps that have been achieved, and those yet to be considered. More frequent communication might alleviate some of these concerns.

The administration, and in particular, the academic vice president, attempted to form an ad hoc task force of administration and faculty union members to address the semester transition issue but, faced with outright refusal by the faculty representatives, turned to the next logical group, the department chairs. Why this group did not formulate a plan for semester transition is unclear. Nonetheless, the fundamental problem of poor change management remains.

The most significant problem occurring at Northern Montana College appears to be the lack of a well-developed and well-communicated plan of action for the semester conversion. Although a three-step process was developed, there was little discussion with the campus community about the steps of the process or how the process was to be implemented. Furthermore, after the plan was discussed there was little forward progress made on accomplishing any but the first phase of the plan. The entire issue was allowed to quietly fade away after the curriculum revision to a three/six quarter credit standard. This lack of planning and failure to continue on a fixed implementation schedule may prove to be costly in the long run.

The planning and transition activities ensuing at the University of Montana are considered in Chapter III. Similar methods of presentation and analysis of data utilized
in this chapter are employed in Chapter III. A brief discussion of results and conclusions will follow the presentation of information.
CHAPTER III

A CASE STUDY OF THE MANAGEMENT OF CHANGE AT THE UNIVERSITY OF MONTANA

Historical and Contextual Perspectives

The University of Montana, one of the two comprehensive universities of the Montana University System, was founded in 1893 with instruction to fifty students beginning in September 1895. There are eight schools and colleges within the University with a full-time, tenure-track faculty of 389. In 1987, Western Montana College in Dillon was merged with the University of Montana. Located in mountainous western Montana, the University of Montana serves the State's citizens through its educational, research, and public service programs. The University of Montana is authorized by the Montana Board of Regents to confer associate degrees in eight disciplines, sixty-one baccalaureate degree programs, fifty-seven master's degrees, and eleven doctoral programs.¹

The organizational structure of the University is typical of many universities with the faculty arranged by discipline into departments led by a department chairperson elected by the members of that department. The departments are grouped into a college or school directed by a dean. The deans are responsible to the provost and academic vice president. Other functions within the university, such as fiscal affairs, are directed by a vice president who is responsible for oversight, planning and coordination. All


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departments, offices, and agencies within the University are responsible to the President of the University who reports to the Montana Board of Regents.

The faculty are represented by a collective bargaining agent, the University Teachers' Union. This union, since its organization, has consistently played an active part in policy-making and academic issues. The executive committee of the union has been responsible for forums of discussion in recent years regarding many issues that touch the lives of the faculty on campus including such obvious ones as salary, recruitment practices, and retrenchment. Union members sit on many of the campus standing committees bringing union concerns to fore when necessary. For example, the union representative on the semester transition committee frequently expressed the union's position on such issues as the semester calendar, length of instructional period, the number of course preparations required during the academic year, as well as other matters. The union appears to be a force to be reckoned with whenever there are debateable issues.

The faculty at the University of Montana have traditionally expected to be consulted by the administration in matters that affect their workload, salary, working conditions, academic standards, et cetera. The faculty, through their Senate Constitution, have created standing committees such as the Academic Standing and Curriculum Review Committee, Tenure Review Committee, and Faculty Senate to provide a means of participation in academic and personnel matters. The administration, in conjunction with the faculty, create temporary ad hoc committees to address specific issues which arise and are outside the scope of responsibility of the standing committees. An example of such an ad hoc committee is the semester transition committee.

The semester transition committee, established by President James Koch, is charged with the responsibility of overseeing all aspects of the University's transition to a semester
The composition of the committee reflects its campus-wide jurisdiction and includes faculty, staff, administration and student members. The scope of authority of this committee appears to be extensive; apparently the decisions made by this committee may be vetoed and/or overturned only by the president or academic vice president and provost. However, to maintain collegiality with its constituency, the committee members encourage open discussion and collect comment and opinion from the campus community.

The administration of the University of Montana, that is, the president of the university and the academic vice president/provost, state that their respective administrative styles require them to consult and work in coordination with the faculty on academic issues. Provost Donald Habbe stated in interview that his is a non-directive management style and, whenever possible, delegates decision-making to the appropriate faculty standing committee.²

With regard to the semester conversion, Habbe believes his obligation to the Board of Regents and to the campus community at the University of Montana requires that the conversion be accomplished in the most efficient manner possible. Although he stressed that he ultimately must answer for any problems that might arise and that he does retain oversight, Habbe stated that he and President Koch have delegated to the Semester Transition Committee full authority for accomplishing the conversion. Furthermore, Habbe added, since a majority of the conversion centers around curricular revision, it is only logical that a committee whose membership is comprised predominantly of faculty oversee those revisions. Habbe concluded that, in his opinion, the faculty and other

²Donald E. Habbe, Provost and Academic Vice President, University of Montana, interview by author 13 January 1989, Missoula, MT.
campus community members are process oriented and, through the establishment of the Semester Transition Committee, a viable and open process has been established to address the concerns and opinions of all members of the community.

The Semester Conversion

The master plan

During the period immediately following the adoption of the semester conversion policy, the administration at the University of Montana examined various methods for achieving the conversion to a semester calendar keeping in focus Habbe’s perceived need for efficiency and timeliness. Habbe and Koch had endured conversions to alternative calendar systems at other institutions and approached the problem from the perspective of their past experiences. Concluding that the committee approach, as opposed to a top-down directive approach, would be more appropriate for the campus community’s characteristics and the University’s traditions, a chair was selected and, through discussion with many campus groups, the composition of the committee was determined. By fall quarter 1988, the Semester Transition Committee was formed and in operation.

At the outset, the transition committee members examined and discussed a number of issues that would have to be addressed and resolved as the planning for the semester system progressed. These issues include the calendar (start and end dates for each term), the conversion schedule, curricular issues, personnel issues, and the ramifications of the switch to the semester calendar on auxiliary and support services such as financial aid, student housing, athletics, and student services.

The opening and closing dates on the semester calendar dominated discussion and thought across campus during the first weeks of fall quarter 1988. The Board of Regents
had requested each institution submit a calendar proposal for the November Board of Regents' meeting and consequently a large portion of the Semester Transition Committee's initial deliberations were focused on this issue. The Committee submitted a proposal to the administration in late October, which was rejected by President Koch and Provost Habbe. Citing political considerations, the President and Provost suggested an alternative set of opening and closing dates for the semester calendar that they deemed more acceptable to the Regents, legislators and the general public. The administration's calendar included an earlier starting date for the fall term and a slightly later ending date in the spring term. The committee and the administration agreed on a fifty-minute class period although some quarters of the campus expressed the desire to move to a 55- and or a 60-minute class period.

Following apparent resolution of the calendar issue, the Semester Transiton Committee moved on to the consideration of other issues related to the conversion process. The next major item to be considered was the list of criteria developed for curricular review and revision. This listing of criteria proved to be a contentious issue since it revolved around the redesign of the general education program. The general education program, a significant component of any academic degree, of necessity had to fit within acceptable parameters including the total number of credits, distribution of courses across the disciplines, the weight each distribution would receive by virtue of the number of credits allowed for each distribution, and, perhaps more fundamentally, the exact definition of the purpose of the general education program. Campus-wide discussion ensued over these matters, and only after much debate, heated at times, was an acceptable compromise reached on the composition of the general education program.
Once the general education program had been successfully re-designed by the Transition Committee, the Academic Standing and Curricular Review Committee (ASCRC), and Faculty Senate, the general curricular review guidelines were developed and disseminated by the Transition Committee to the academic units on campus and to ASCRC. The Transition Committee and then ASCRC, each utilizing a subcommittee approach, began the process of curricular review during the academic year 1988-1989. Subcommittees were assigned academic programs for review. Subcommittee members met with the academic program faculty to evaluate the course offerings that had been developed, revised, or deleted. To make the enormous task of review less overwhelming, the first round of analysis concentrated only on the 100 and 200 level courses.

At each step of review by ASCRC, representatives of the Semester Transition Committee were available to provide guidance and assistance. These representatives also communicated to the ASCRC members any new developments or changes in the guidelines as prepared by the Semester Transition Conversion. It appeared that attempts were made to maintain ongoing communication between these two committees.

Meanwhile, communication between the Semester Transition Committee and the campus community was formalized in the Semester Transition Newsletter, issued by the Transition Committee, and through word-of-mouth reporting by Transition Committee members to their respective constituents. Periodically, the campus newspaper, The Kiamin, reported on developments and decisions made by the Transition Committee, ASCRC, faculty senate, and other committees grappling with conversion issues.
Analysis of Data

Of the 389 full-time faculty at the University of Montana, one hundred three were either personally interviewed or asked to complete a questionnaire. This group of faculty was selected on the basis of their membership on the faculty senate, the teachers' union, the transition committee, the ASCRC, or because they were a department chair. Of the group of 103, fifty-four agreed to be interviewed or returned the questionnaire for a response rate of 52%. Follow-up was attempted to improve the response rate, but due to the approach of the end of spring quarter, the follow-up was not very successful. Similar questions were used in both the interview and on the questionnaire. The questions were identical to the ones used at the Northern Montana College campus, appropriately modified to reflect the membership group at the University of Montana; for example, rather than the Northern Montana College Federation of Teachers, the University Teachers' Union was identified as the target group. One additional question pertaining to the Semester Transition Committee was included on the questionnaire and in the interviews of faculty members of the University of Montana.

The purpose of both interview and questionnaire was to determine to what extent the respondent was aware of the semester conversion issue and process. The questions were meant to allow the respondents to express their personal perspective and opinion of the change process. The responses from the interviews and to the questionnaire were extremely varied but in only two instances did the respondents refuse to offer at least some opinion or impression. Of the two exceptions one wrote "I am unable to reply" on the face of the questionnaire, and the other refused on the grounds that the questionnaire was poorly designed.
What follows is a brief description of the responses to each question. Excerpts are taken from written responses, and replies from the interviews are used to illustrate the perceptions and impressions expressed by respondents. Anonymity is honored and therefore the names of the respondents are not included although anonymity was not a condition of responding to either interview or questionnaire.

Question one focused on the reaction to the decision by the Regents to implement a semester calendar at all institutions within the Montana University System. Almost universally a sense of having been insulted by the Regents pervades the collection of responses. The majority express at least irritation for not being consulted or allowed to voice opinion before the decision was delivered: "Disappointed that we had so little input in the decision. Frustrated that we are expected to conduct the transition with no resources," "Most are extremely unhappy after all arguments presented appeared to have been ignored," "The initial (and continuing reaction) is that the Regents' decision was made without adequate consideration of academic implications in a period of inadequate financial resources." There were occasional expressions of excitement over the prospect of curricular review "It's about time someone or something forced an updating of the curriculum on us. Some of our faculty members are using lecture notes penned in the early (19)40s!!!!!!" Some stated that, in the long run, the conversion would have little impact on educational quality and the faculty would adapt and go on with life as before. Most also felt that it would be an inordinately expensive undertaking: "Unhappy to waste so much time and money for changes which will not help the curriculum," "There seemed to be a majority opposed to instituting a conversion at a time when resources are already stretched to the breaking point."
Question two asked for a description of the process of conversion and the faculty's role in that process. The reaction of the majority of the respondents appears to be positive, for example: "It is a well-managed process beginning with guidelines, then the lower (level) class course conversions, and finally the upper and graduate courses." Most of those who replied were cognizant of the guidelines delineated by the Semester Transition Committee for curricular revision. While displeasure with the decision was expressed, there appeared to be a willingness to follow and comply with the guidelines. The academic department as an organizational structure within the faculty body was of importance in that many of the curricular decisions made for conversion occurred within the department. This opinion is expressed by comments such as the following: "Each dept. responsible for looking at their own curriculum and making class offering decisions," and "Transition committee to organize the change. Indiv. depts. make changes, submit to Trans. Comm., ASCRC, Fac. Senate for approval." Respondents with ties to the faculty union expressed the opinion that the union's only role was that of watchdog to ensure that contractual rights and obligations are protected during the conversion process.

The faculty union members who returned the questionnaire seemed to be adopting a hands-off attitude with regard to the conversion. "Union has little role in the process," and "The union as an entity is not directly involved except in terms of contract enforcement," are typical of the perspective held by this group of respondents.

Few of those who replied to the questionnaire, however, were able to discuss the semester conversion process beyond the curricular process. One person expressed the opinion that the conversion process is exclusively an academic matter and therefore the domain of the faculty. There were no observations on the potential impact the conversion may have on other offices, departments, and functions of the university.
community. On the basis of the replies to this question, it appears that the faculty are quite concerned about the curricular revision process necessary for the conversion, and tangential issues are of little interest.

As a follow up to question two, question three requests a description of the guidelines provided the faculty for the conversion. The majority of the replies focused on the curricular revision process, for example: "Guidelines were compiled and circulated to the faculty. These included guidelines about credit hour reduction, configuration of course offerings, consideration of impact on faculty (work)load and the like." Other replies contained references to the Regents' initial guidelines regarding the common calendar and transferability issues. The consensus appears to be that the guidelines provided by the Semester Transition Committee are clearly expressed, easily implemented (although with pain and sorrow over the decrease in the number of course offerings possible), and fair in their impact. Most believed the guidelines to be well developed and presented; "Good guidelines with timely deadlines," and "Detailed by campus committee. Generally well thought out and helpful." These appear to be the opinion of the majority; however, there are opposing opinions.

There were two respondents who believed the faculty to be at the mercy of the Regents and considered the guidelines presented by that group to be ill-advised, and poorly developed with many ambiguities and uncertainties. There appears to be anger over the lack of incentives for the process: "Lots of rules for changes without extra compensation." Several felt that in addition to the compensation issue that there was little attempt to address practical problems: "They (guidelines) were poorly expressed, not well thought out and didn't come to grips with practical problems at the program level." What these problems are was not explained.
Other than these expressions of anger and displeasure, the majority opinion holds that the guidelines prepared for curricular revision were clear, concise and could be implemented in a timely fashion. As in question two, little interest was taken of other aspects of the conversion process.

Question four asked for a discussion of the scope of authority and responsibilities of the Semester Transition Committee as perceived by the respondent. The responses to this question appear to fall into four broad categories ranging from the perception that the Transition Committee rules arbitrarily and unilaterally with little regard to normal channels of governance to the opinion that the Committee serves only as a coordinating body with no power, authority or decision-making role. The following are examples of the type of reply received: "There was little room for substantive discussion, the Committee mandated what was to be done, when and how." "The Transition Committee was vested with the primary authority for policy-making. Academic decision-making is still the role of ASCRC and the grad council." "They have met, listened, and reacted to faculty comment." "This committee is the conversion coordinator."

The frequency of the four types of reply was approximately equal, perhaps indicating that the Committee's composition, purpose, and activities have not been well publicized on campus. However, despite the apparent confusion, the Semester Transition Committee appears to be a well-known entity on campus and has achieved acceptance among those who responded to the questionnaire.

Question five, which considered the administration's role in the conversion process, brought out expressions of sympathy for and anger with the administration, particularly the President and Provost, over the semester conversion issue. Many expressed the belief that the administration was caught in between the Regents and the faculty and were
trying to make the best of a bad decision: "The administration attempted to convey the faculty's concerns regarding the semester conversion. Suggestions and policies proposed by the faculty have been supported by the administration." There appears to be a moderate amount of anger that the administration has not been more directly involved in the conversion process if for no other reason than to provide their wider perspective on the complexities of the conversion: "The Semester Transition Committee, as well qualified as it is for curriculum changes, couldn't anticipate the kinds of problems confronting them vis a vis early retirements, sabbaticals, split teaching-research appointments, and enrollment swings (the latter will result from self-supporting students that would have gone two quarters and dropped out two quarters to work having to decide which semester to attend)."

Others are convinced that the administration was not vociferous when representing the faculty before the Regents: "Administration did not represent faculty and student needs strongly enough at the time the decision by the Board of Regents was made."

However, the predominant impression is that the administration has delegated the responsibility for the conversion to the Semester Transition Committee and had the good sense to allow that committee do its work without interference, "The administration delegated responsibility to an able faculty member, Jim Lopach, and appointed the Semester Transition Committee. Then left us alone to wrestle with the issues."

**Conclusions**

As with the NMC case study, there appears to be several forces at play which temper the reliability of the data collected through the interview and questionnaire process. First, at the time the majority of the questionnaires were issued to the U of M
a retrenchment had been announced. Many of the responses reflected the concern that the two issues, that is, the semester conversion and the retrenchment, were inextricably twined. While this cannot be verified, the perception persists nevertheless. Additionally, recall of events was not precise and consequently answers were vague. However, for the most part it was obvious that those who agreed to be interviewed or responded to the questionnaire took time in replying. The care taken by the respondents may offset some of the above problems.

Several tentative conclusions can be made at this point. First, there is widespread and deep-seated disagreement with the Regent's decision to implement a semester calendar, the manner in which that decision was made, and the lack of access to the Regents on this issue since the time they announced the decision. Even in responding to questions with no reference to the initial decision-making process, many respondents took the opportunity to vent their frustration and anger. The majority opinion holds that the decision was made in a capricious manner with little thought given to the impact on students. Further, the respondents apparently see no constructive purpose in this particular change, and the results to be achieved have not been adequately delineated. Respondents also expressed the belief that the true costs have not been accurately calculated. It appears that these deep-seated feelings show no sign of abating even with the passage of time and that this may jeopardize the ultimate success of the conversion.

A second conclusion to be drawn from the data is that the Administration's decision to create an ad hoc committee charged with the responsibility of overseeing the conversion process was perhaps the wisest course possible for this campus. While there does appear to be a minimal amount of confusion over the Semester Transition Committee's exact function and scope of authority, the consensus among the faculty
appears to be that they feel they have a direct link to the process through the membership of the Committee. The interests of the faculty in particular, and the campus in general, appear to be well represented on the Committee, and the attention the Committee members have afforded those needs has ensured the support of the faculty. Assuming the Committee continues to seek out the opinion and advice of the faculty and other campus members, the Committee should continue to receive support despite the on-going disagreement over the basic issue.

The third conclusion which can be offered is that there exists the perception that there is a definite plan of action to accomplish the conversion. Most expressed the belief that the guidelines provided for the curricular revision process were clear and well-developed. For the most part, the respondents were agreeable in following the guidelines and were willing to meet the timeline set by the Semester Transition Committee.

The transition process at the University of Montana has been, in general, very successful to date. This success can be attributed, in large measure, to the plan developed for the implementation of the change.

The change process can be managed and controlled. However, to remain in control of the process, a management plan is a necessity. Chapter IV offers a model of change management which can be applied to change of any magnitude. Additionally, because change often arouses some degree of resistance, Chapter IV considers resistance to change with a discussion of its causes.
CHAPTER IV
A CHANGE MANAGEMENT MODEL

Implementing the Change

While this paper does not represent a policy analysis of the decision to convert to the semester calendar, the events that occurred at Northern Montana College during the initial stages of transition to a semester calendar, as described in Chapter II, illustrate the difficulties that may develop when change is not planned and managed. To avoid similar difficulties, an organization may find the change process easier to manage by having a set of guidelines to follow during the change.

This section of the professional paper offers some suggested guidelines which could be utilized for the implementation of change. Recognizing that a prescriptive paradigm would have limited use if too rigid, the procedures outlined in this chapter are intended to be broad enough to be useful for any change enterprise.

Selecting a Change Agent

Change typically results from an awareness that some aspect of the organization's operation requires modification to ensure the organization's survival. Changes may also arise from a desire to do things differently. Whatever the causal agent or reason, the first step in the change process is to select the change agent. Selection of the change agent should be given careful consideration, according to Robert H. Waterman, Jr., coauthor of
In Search of Excellence. In his book, Adhocracy, The Power to Change, Waterman states that the selection of the change agent and executive management's clearly expressed support of that change agent are perhaps the most important determinants of a change's success. Change agents should be acknowledged by the organization's members as being a credible choice on the basis of their knowledge and understanding of the situation to be changed, the change agents' personal characteristics of integrity, industriousness, and sense of fair-play, the change agents' position within the organization, or other factors which the organization's members deem important. Following selection of the change agent, one of the first activities which must occur is an accurate assessment of the existing circumstances in which the organization is functioning.

Assessment of the Environment and Problem Identification

The organization functions within a dynamic environment with such factors as the organization's mission and purpose for existence, the training/educational preparation of its membership, and the political and economic conditions within and external to the organization setting the tone of that environment. Likewise, the organization's culture -- the amalgam of attitudes, philosophies, values, myths, and symbols that make the organization a unique entity -- affect how the organization reacts to its environment. An analysis of these factors is useful in determining the status quo, however, problem-identification is necessary to determine what forces or conditions may be causing the need

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for change. Problem-identification, the assessment of the environmental factors, and the analysis of the organization's culture and characteristics may indicate a number of alternatives that could produce the desired change. To ensure that the selected alternative is congruent with the organization's culture and resolves the problem requiring change, it is important to test each alternative to determine whether it has the capability of producing the necessary change.

The alternative approaches to change which have been developed during the problem-identification and assessment phase may be tested using any one of a variety of methods of analysis, such as decision-tree or theoretical forecasting. After careful analysis and consideration, one of the approaches to create the desired change is selected and planning for the implementation phase begins.4

Planning for the Implementation of the Change

There are several steps in the planning phase of the change process. During the initial stages of the planning process it is imperative that those who will be directly affected by the change be identified. If the culture of the organization permits, these people should be included in all subsequent planning and implementation activities, perhaps through membership on a steering committee. This group's participation during planning will help determine what obstacles there might be to full implementation of the change since it is likely that these people are most aware of the problems and of other interrelated processes or functions that may be impacted by the change. While it is

4Goodman and Associates, 91-96.
impossible to include everyone on a committee, there should be an effort made to seek
the opinions and suggestions of as many from this group as is possible and, once
obtained, to give careful consideration to those opinions and suggestions. By including
those directly affected by the change, open communication can be established in the early
stages of the change process.®

Equally as important to the planning process as the inclusion of key people is the
allocation of adequate resources to the change effort. Adequate resources include
money, time, equipment, and expert (or technical) resources that the change agent may
utilize for the change process.® A commitment must be made by the organization to use
its resources to accomplish the change since, more often than not, there are competing
claims for the organization's resources. Consequently, careful consideration must be given
to resource availability issues prior to the initiation of the change process; if resources are
not forthcoming for the change process, reconsideration of the change itself must be
made because the likelihood of successful change diminishes significantly as resources
become scarce or non-existent.® Once the commitment has been made to use the
organization’s resources for the change and for the allocation of resources to be realistic,
a clear and concise statement of the purpose and goal of the change must be formulated.
From the statement of purpose, a plan of specific activities to accomplish the change can
be developed.

®Waterman, 35-41.
®Ibid., 15-18.
®Ibid., 26-27.
The Statement of Purpose for the Change

A coherent statement of the purpose for making a specific change is a crucial element in the change process. The statement provides the organization's members with a definition of the change, with explanation of the reasons for the change, and specifies the desired outcomes which are anticipated from implementation of the change. Time spent developing a statement of purpose will save much time and effort later.⁸

For the time spent developing the statement of purpose to be effective, the statement of purpose should be discussed with all members of the organization. If appropriate to the magnitude of the change, executive management should spearhead dissemination of the purpose statement, thereby emphasizing the importance of the change and establishing the necessity of the change process. Following formulation of the purpose and goal statement, the change can be divided into smaller objectives to make implementation more manageable.

Objectives and Activities

Each of the smaller objectives should be achieved through specific activities. These activities will serve as the directing force of the change process. Each activity should simultaneously contribute to the achievement of an objective and the overall purpose of the change. The activities should be constructed with measures or checkpoints so that it is easy to determine when an activity, and eventually, the objective has been achieved.⁹

It is important to remember that thorough research often saves much time. Research may reveal a similar process, procedure or form used for other purposes or by other

⁸Basil and Cook, 181.

⁹Martorana and Kuhns, 163-170.
organizations that has been effective and can be modified for the particular change desired. Just as necessary as developing clearly defined objectives and specific activities, is developing realistic timelines and setting deadlines for the completion of the objectives and activities.

Generating Timelines and Setting Deadlines

Timelines and deadlines help mark progress toward achievement of objectives and provides a measurement of the time needed to implement the change. Timelines are important for providing a focus on the activity or objective. If checkpoints are included on the timeline, those implementing the change will be able to gauge their progress toward the completion of the aspect of the change process for which they are responsible. To be even more functional, the timeline can be graphed or charted to provide a visual as well as conceptual image for the change agent and others involved in the change process. Such visual aids provide a clear picture of forward progress and where delay is occurring if the checkpoints on the timeline are not being met. Several computer programs are available for developing a timeline, but this level of sophistication is not necessary; a chalk board or large poster board is adequate for the purpose. However, all timelines should have a deadline to mark the end of the activity, objective, and change process.¹⁰

Deadlines are as important as the timelines to the change process. Without deadlines, it is easy for the project or change process to flounder simply because there is no ending point. A deadline frequently creates the pressure necessary to ensure focused attention on the change process. However, the deadline must be realistic otherwise the

¹⁰Waterman, 65-68.
direction and focus provided by the deadline will become a demoralizing force on the
those attempting to implement the change.

Realistic timelines and deadlines must be flexible, allowing some latitude for
unanticipated events. Additionally, deadlines should include time for the educational
and training needs of those affected by the change. If new equipment or facilities are a
part of the change process, installation and/or building time must be figured into the
timeline, usually with allowances for delays. Success of the change may be jeopardized if
too many other activities and functions hinge on the timeliness of installation and/or
building processes.

As new equipment is installed and methodology implemented, periodic reassessment
of the environment is useful in identifying potential problems and/or obstacles to the
success of the change. Changing internal and external environments and unforeseen
circumstances may require modifications to the timelines, deadlines and perhaps even to
the original change approach. Monitoring the environment may indicate what
modifications and adjustments to the original purpose and change plan are necessary.
Assuming the initial change process was developed to allow flexibility, modifications
should not endanger the change itself but refine it for a "better fit" to the organization
and its environment. Careful observation of the organization and its members has an
additional benefit in that developing resistance can be more quickly identified and
resolved. Effective change management requires that potential resistance be recognized
and strategies developed to overcome resistance as it develops.

11Bennis, Benne, and Chin, 279-282.
Managing Resistance

Successful change management seeks ways to avoid resistance during the problem-solving stage. Careful monitoring of the environment for signs of resistance increases the likelihood that difficulties can be identified early and countered before the change plan is jeopardized by overwhelming resistance.

As the proposal for change is being developed, specific strategies to counter resistance should be developed with an effort made to identify as many objections to the change as possible. Most resistance to change is a result of anxiety organization members feel when customary and expected modes of behavior are altered. However, recognizing and understanding the basis of the resistance does not necessarily eradicate the resistance. To manage resistance, the effective change agent will have a plan for coping with resistance as it arises.

Planning for resistance to change is necessary since change within an organization usually engenders a negative response from at least a portion of the organization’s members. Even change that is perceived as needed, well conceived, and carefully implemented may be strongly resisted by some. Throughout the duration of the change process, resistance to the change typically moves through a cycle.12

The Cycle of Resistance

In the initial stages of a change enterprise, it may be that only those who have been involved in the formulation of the change concept, such as the decision to change from a quarter calendar to a semester calendar, recognize the potential benefits to be realized from the change. During this stage of the change process, the amount of resistance to

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12Ibid., 487-488.
the idea may appear overwhelming. At the first point on the resistance cycle, the greatest number of people will be willing to express doubts, displeasure, and outright refusal to accept the change.

During the second stage of the resistance cycle, as support for the change increases, the number of people who continue to be resist is decreasing. Those who continue to resist do so despite attempts by the change agent to communicate the benefits of the change. The resistors can usually be identified by their negative reaction to the change and, once identified, their ability to adversely influence the implementation of the change can be measured.

The resistors may precipitate a confrontation with the supporters of the change in the third stage of resistance. At this stage, the resistors believe they have one last opportunity to maintain the status quo. Confrontation is the resistors' attempt to cause the change to be abandoned.

In the fourth stage of the resistance cycle, those continuing to fight the change are usually considered, by the majority of the supporters, as stubborn, intransigent and incapable of change. The effective change manager, however, will recognize that even the "hold-outs" can be assets to the organization's future and will work towards resolving the remaining issues with these members. The future success of the changed organization may depend on the degree of humanity with which the resistors are handled. If treated with undue severity, the resistors may be able to arouse the sympathy and support of those who have not totally embraced the change.

In the fifth stage, resistance is waning. The resistors will leave the organization or abandon their stance if there has been effective resistance control. It is important for the change agent and the organizational community to allow those who choose to stay with
the organization to "save face" and be reintegrated into the mainstream of the organization. With resistance negated, the change process should be able to continue to full implementation.

Managing the resistance cycle is an important component of the overall management of the change process. The resistance management process includes activities which are obvious and logical yet often overlooked when the change agent is confronted with a concerted attempt to halt the change effort. The basis of most, if not all, of the management activities is effective communication with the organization's members.

Using Communication to Overcome Resistance

Opportunities to establish communication channels throughout the organization should be sought by the change agent in order to minimize the resistance that arises from lack of knowledge of the change. These communication links may follow the formal lines of authority or those established by informal relationships that develop in the organization.

The formal communication lines follow the chain of command and employ established communication vehicles, such as newsletters, computer mail networks, and intra-organization memoranda. Formal communication also recognizes and uses the committee structure that exists within the organization. Informal structures, such as social clubs, coffee and meal groups, and one-on-one discussions with organization members, also present good communication possibilities and should not be avoided merely because they are informal. All communication opportunities should be utilized to the fullest

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13 Ibid., 488-490.
extent possible to ensure on-going dialogue between the change agent and those who will be affected by the change.

Typically, resistance occurs when there has been little or no direct communication between those who will be affected by the change and those making the decision to effect change. Vigorous communication within the organization may be the only avenue for overcoming the resistance which emanates from change directed by an authority that the organizational members consider to be outside the organization.

Coping with Change Imposed by an External Authority

A change that has been demanded by those outside the organizational community or outside the group that will be affected may provoke the organization members to resist the change, irrespective of their personal feelings for the change itself. Resistance is further exacerbated when those affected by the change imposed by an outside authority have not been involved in the decision to make changes. Such reaction, based solely on their lack of involvement in the decision-making process which produced the change, may be irrational but, nonetheless, a very real difficulty to the change enterprise. Resistance to change that has been mandated by an external authority may be minimized if a representative of the external authority were to discuss with the organization's membership the nature of, the reasons for, and the anticipated outcome of the change, and reassure the organization's members that their personal membership as well as the organization's continued survival are not threatened by the change. The reaction to change imposed by external authorities may result from the organization members' belief that the change will be detrimental in some way to either themselves personally or to the organization.
Resistance to change is often the result of the organization’s members’ perception that the external authority has assumed control over their lives through the imposed change. This type of reaction may occur whenever the organization members have not participated in the planning process leading to the change, whether the change is imposed from within or by an external authority. Management can alleviate much of the resistance that springs from the members’ feeling of being shut out of the process by encouraging their participation, seeking out, listening for and acting on the feedback that organizational members express regarding the change, and through expressions of support for the change process.\textsuperscript{14}

With resistance controlled and the change process progressing toward completion, a reassessment of the internal and external environments assists the change agent in determining whether the original purpose and goal of the change has been accomplished.

**Assessment of the Changed Organization**

When the change process has been completed, a final assessment of the organization is necessary to determine whether the change has indeed accomplished the stated purpose and whether there have been unanticipated side affects resulting from the change. The organization’s external environment should be reassessed a final time as well to avoid overlooking important changes which could have an adverse impact on the changed organization. The follow-up assessment also provides closure to the process. Since few changes end up exactly how they were originally envisioned, it is important to determine if the organization has benefitted from the change or if further change is necessary.

\textsuperscript{14}Waterman, 1-3, 24-30.
Conclusions

Organizational change involves many complex variables which influence the change process. Inevitably, the interaction of those variables set into play a variety of responses which can only in part be controlled by the change agent. However, without some attempt to control the change process, the process will overwhelm the organization.\textsuperscript{15} It is to those attempts that the above suggestions are made. Without question, no one set of procedures will suffice for all change endeavors. However, if approached with the understanding that flexibility is key to the process, the guidelines suggested can be applied to most change projects. What is important to any change program is the realization that a plan of action is vital. Without clearly stated objectives and goals that are contained in such a plan, the change process will be without focus and direction.

The focus and direction of change is often obscured by resistance. Therefore, the change agent must be alert to developing resistance and manage it carefully. Resistance need not always be considered a negative force. Resistance can raise valid objections which, if given honest consideration, may reveal factors overlooked during the initial fact-finding and solution formulation stages. Making alterations early in the change process to respond to those factors may safeguard the change's successful institutionalization.

Change, by definition, requires an alteration in the status quo. The future will not be the same as the present, and change is inevitable if the organization is to function successfully in a different future. As a primary objective, planned change should create an improved future for the organization and its members, not just a different one.

The Montana University System in general, and the University of Montana and Northern Montana College in particular, are in the process of creating a different future through the planning and implementation of the transition to a semester calendar. All activities, functions, operations, and perhaps even some facets of the basic mission of these institutions will be irrevocably altered during and following this transition. Chapter V, the concluding chapter of this paper, draws together the results of the case studies and the change management model presented in Chapter IV. Chapter V will offer some conclusions and discussion of the anticipated outcome of this particular change process.
CHAPTER V
MANAGING CHANGE

Conclusions

The management of major change has been the topic of this professional paper. The topic has been examined from the perspective of case studies of the on-going conversion to the semester calendar from a quarter calendar at the University of Montana and at Northern Montana College. The case studies were conducted through field interviews with faculty, staff and administrators, through the analysis of responses to a questionnaire submitted to faculty members, and through observations of committee meetings, open forums, and reviews of newspaper articles and other printed material pertaining to the conversion. A brief review of change management literature complements the case study data. A discussion of management activities followed the case study chapters, offering a method which may be useful for implementing change. This final section offers a brief summary of the information presented in preceding chapters and some concluding remarks.

The Case Studies

The decision to adopt a semester calendar was one of several decisions made by the Montana Board of Regents in 1987, to address issues raised by an increasingly hostile state legislature. The adoption of the semester calendar on a system-wide basis answered
many of the criticisms that had been leveled against the University System in general and the Board of Regents in particular. The criticisms included the escalating cost of delivering higher education in Montana, the difficulty students encountered as they transferred from one state educational institution to another, and the lack of control the Regents had over the University System. During the months immediately preceding the 1987 legislative session, the political environment was relatively turbulent and inhospitable with regard to the University System and the decision to convert to a semester calendar was meant to enhance the Board’s reputation with state legislators and the general public. Since that time, the membership of the Board of Regents has changed, with the exception of Board member Elsie Redlin, who remains on the Board. The current Board and the acting Commissioner of Higher Education, John Hutchinson, have taken action to bring the six member institutions into closer alignment in an effort to create a true university system in place of the loose association of institutions of the past. The formation of a functional university system makes the conversion to a semester calendar a logical step towards achieving that goal.

However, since creating a functional system was not a driving force in 1986-1987, when the decision to change was made, the Regents could have facilitated the initial period of the process by discussing with the campus communities the extant reasons for the semester conversion. Many members of the campuses did not feel there was a plausible reason at that time for the adoption of the semester calendar. Instead, however, the Regents appeared to relinquish control and lose interest in the conversion process once the decision was made and essentially refused to continue any dialogue regarding their decision. The Regents left the respective campuses to their own devices to plan and implement the new policy.
The Regents' semester calendar policy has, in many ways, had a significant impact on the two organizations observed for this paper. Because this change was imposed by an agency external to the organizations, the Montana Board of Regents, the tone of the change process was set by parties other than the members of the organizations affected by the change and this, coupled with the lack of direction from the Regents, contributed to the difficulties experienced at the University of Montana and Northern Montana College.

Change at the University of Montana

At the University of Montana, lengthy consideration apparently was given to determining the best approach for conducting the planning and early implementation phases of the semester conversion. The result of these deliberations was the formation of the ad hoc Semester Transition Committee which was charged with the responsibility of bringing the semester calendar to reality.

The committee approach is a sensible approach at this institution since much of the decision-making processes on the campus appear to be on a consensus basis. The use of committee also allowed a more broadly-based system of input into the conversion process than would an approach utilizing one individual or a small group of persons. Furthermore, the committee members apparently recognized early the need for wide participation in the transition and endeavored to involve as many from the campus community as was feasible. The committee approach also improved the potential for good communication with the entire campus community. As each committee member discussed with colleagues the activities of the Committee, better understanding of the Committee's purpose was fostered. Although there appeared to be some confusion over

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the exact role and activities of the Committee, its existence was well-known. The campus community was informed of the Committee's activities by newsletters published periodically throughout the year. Additional communication from and about the Committee might have eliminated some of the initial confusion.

The Committee's main focus during the 1988-1989 year was on curricular issues, and it appeared that most of the organization members were well aware of the guidelines developed by the Committee for curricular review and revision. While other aspects of campus life, such as auxiliary services and athletics, were examined by the Committee, it was the curriculum that held the most interest and concern for faculty members. The clearly stated guidelines, the set deadlines, and an accessible discussion forum through both the Curriculum Committee and Semester Transition Committee helped alleviate much of the anxiety and resistance that could have erupted into open conflict during the curriculum development and review process.

While much of the resistance to the conversion had been neutralized, faculty discontent and anger about the manner in which the conversion was being imposed on the University from the outside remained an influencing factor on the change process as late as April 1989. The efforts and management activities undertaken on campus appeared to have mitigated some of this anger.

Despite the remaining problems, the momentum with which the conversion process was progressing at the University of Montana during the 1988-1989 academic year can be attributed to the fact that a plan of action had been developed and was being utilized. That plan of action gave focus and direction to the conversion to a semester calendar. A change agent was selected early in the process and was acceptable to most of the community members. This ad hoc committee was formed and charged with the
responsibility of planning and implementing the transition process. The committee's composition was broadly representative which ensured that those affected by the change would have a vehicle for transmitting their opinions to the committee.

The change agent and task force developed philosophical and technical statements of purpose which were widely discussed with the campus community. Objectives, guidelines, timelines and deadlines were developed, their content being drawn from the purpose statements. Frequent meetings of the Transition Committee kept the committee on task and announced to the campus community the importance of the project. Likewise, the frequent reference to the Committee's work by the administration, especially as reported in articles published in the student newspaper, further emphasized the administration's support and the significance of the process. The timelines and deadlines were accepted by the campus community as being realistic and reasonable. The availability of the change agent to all groups and individuals who wished to voice opinions and concerns opened communication channels to the change process. In contrast to the transition process occurring at the University of Montana, the process at Northern Montana College was far less organized or effective.

Change at Northern Montana College

The initial stages of the transition process at Northern Montana College were directed by the chief academic officer, Vice President for Academic Affairs Jerry Brown. An early attempt to involve the faculty union in the preparation for a semester calendar proved abortive and no other committee was formed to take its place. The executive administrators believed that conversion to semesters revolved around academic issues and was initially addressed through the curriculum review and revision process. The
Curriculum Committee, a standing faculty committee, became involved in the process after the Vice President announced a three-phase implementation plan, the first phase being a revision of every course to carry a credit assignment of either three or six credits. This strategy was predicated on the ease with which the credits earned for those courses could be mathematically converted, for transcript purposes, at the time of the calendar switch. While a majority of the faculty agreed with the plan, a small vociferous group expressed their disagreement and resisted even this initial transitional phase. In part, their disagreement apparently resulted from a lack of conviction that the semester calendar would indeed be imposed, the typical expression of the disbelief being "the Regents will eventually come to their senses."

Following the completion of this initial curriculum revision phase, there was very little action taken on the many other tasks of implementing a semester calendar. For all intent and purposes, management of the calendar change came to a halt.

There are many reasons for the lack of progress towards implementation of the semester calendar at Northern Montana College: the Regents' decision angered many of the campus members; the actions taken by the academic vice president exacerbated the anger; and, finally, there was no strategy for implementing this change. The skeleton of a plan of action developed early on was not supported by the senior administrators and when the faculty's anger culminated in threats of a no-confidence vote, the plan was abandoned. Eventually, the issue faded from the campus community's consciousness, and for all practical purposes there was no work done towards planning or implementing the semester system at Northern Montana College during the 1988-1989 or 1989-1990 academic years. However, during the last months of the 1989-1990 year, growing
awareness of the need to re-initiate the change process developed among the executive administrators’ staff.

The recognition of the need to begin planning for semester conversion grew out of the concurrent discussions taking place in the Commissioner of Higher Education’s office and throughout the state on the need to strengthen the university system and the role the semester calendar played in such a system. Since the semester policy was apparently not going to be rescinded, it appeared that there was no alternative but to implement the policy in an effective and efficient manner.

Acting Vice President for Academic Affairs, Martha Anne Dow, initiated discussions on how best to approach the semester conversion, ever cognizant of the difficulties experienced in 1987-1988. Many of the guidelines presented in Chapter IV were examined for their usefulness during the discussions and a preliminary plan of action was formulated which included the appointment of a change agent, the formation of a task force to oversee the transition process, allocation of resources, and the development of timelines and deadlines. However, all was held in abeyance for the arrival of the College’s new president, William Daehling. On his arrival, Daehling, quickly became engaged in the on-going discussions surrounding the semester conversion. Daehling selected a change agent and by mid-September, 1990, had appointed members of the faculty, administration, professional and clerical staffs, and the student body to the task force, achieving a broad-based representation of the campus community.

Involving those who will be directly affected by the change should be one of the first steps in planning the change process. At NMC, the change agent and task force members will proceed with the next planning steps as they begin meeting regularly. Formulating the purpose statement, determining the specific objectives to be
accomplished, and detailing the individual activities necessary to accomplish the overall goal will claim the task force's attention during the first meetings.

Although the planning has just begun, there appears to be a commitment by the majority of the institution's members to avoid the difficulties of the 1987-1988 attempt at semester conversion. Vigorous efforts are being made to establish a strong communication network across campus. For the most part and for the first time, the majority of the campus members are actively participating in the first stages of planning for the semester transition.

Summary of Change Management Model

The management of change is of urgent importance for organizations and the members of those organizations. Unfortunately, it would seem that change is rarely anticipated or planned even in the light of its inevitability. Without some effort to control and direct change, the change process may overwhelm and jeopardize the forward progress of the organization. The management of change has been the subject of research and writing by scholars, educators, and managers. Many have attempted to offer explanations and descriptions of the change process. The theories and concepts developed in these studies can assist the manager in coping with change. But, perhaps because change is not considered an activity to be managed, theory is often not applied and the change process ends up controlling the organization.

Taking charge of the change and actively planning for its implementation can prevent the change process from overwhelming the organization. Carefully developed plans with the objective of achieving the desired outcome are necessary for the successful institutionalization of the change. The planning activities include:
1. selection of the change agent;
2. assessment of the environment and identification of the problems requiring change;
3. planning for the implementation of the change;
a. development of a statement of purpose of the change (or problem-statement if this is more appropriate to the particular change being considered);
b. development of objectives and specific activities which will achieve the objectives;
c. development of realistic timelines and setting deadlines;
4. management of resistance;
a. management of the cycle of resistance;
b. establishment of communication links to overcome resistance;
c. management of change imposed by an external authority; and,
5. assessment and follow-up.

These are broadly outlined activities, and each activity will have a corresponding set of tasks to make the activity more manageable. While no one set of procedures will suffice for all changes, the basic management paradigm remains the same and can be applied to any change, even those considered so insignificant as not to be worthy of the label.
Change is a necessary and expected factor in the continued existence and survival of all living things including organizations such as institutions of higher education. If the premise that change is necessary is accepted, then change becomes an integral facet of the organization's operations. Even minor change will have some impact on the future operations of the organization. Major change, by its very nature, will radically alter the organization and its functions. The challenge, then, is for organization managers to implement change in a manner which does not jeopardize the successful functioning of the organization and achieves the desired outcome. This can be accomplished by recognizing the inevitability of change and making conscious efforts to manage the change enterprise.
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APPENDIX

Samples of Interview Questions

and

Faculty Questionnaire
Semester Transition

1. What do you perceive is the role of the commissioner's office, and in particular your role, in the transition to a semester calendar system?

2. What guidelines, regulations, or System-wide policy have been promulgated regarding the transition process?

3. In what manner are the decisions and policies made by the respective institutions regarding transition being reviewed by you? Do you have veto power?

4. Will any university system employee receive release time, reassigned time, or any other form of compensation for their work on the transition process?

5. How much of your work day/week/month is allotted to the semester conversion?

6. How would you describe your management style in relation to your duties and responsibilities as Deputy Commissioner for Academic Affairs?

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1Interview questions for Robert Albrecht, Deputy Commissioner for Academic Affairs, Montana University System.
Semester Transition Process

1. Please describe the semester transition process at your institution (i.e., will the transition be planned by you alone, by a committee, et cetera).

2. What do you perceive is the administration's role in the transition to a semester calendar system?

3. What other individual(s) and/or group(s) are involved in the transition process?

4. Do you retain review and veto rights to all decisions made by these other individual(s) and/or group(s)?

5. Are any members of the faculty or staff receiving release time, reassigned time, or any other form of compensation for time spent on the semester transition?

6. How would you describe your management style in relation to your duties and responsibilities as Vice President for Academic Affairs?

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2Interview questions for Jerry W. Brown, Vice President for Academic Affairs, Northern Montana College and for Donald Habbe, Provost and Vice President for Academic Affairs, University of Montana.
Name of Faculty Member
Organization
Institution

Questions regarding the semester calendar.

1. Please describe the <organization> reaction to the decision by the Board of Regents to implement a semester calendar system.

2. Please describe the process being followed at NMC to prepare for semester conversion and the <organization> role in the process.

3. Please describe the guidelines given the <organization> to prepare for transition to a semester calendar, including any restrictions, limitations, or mandates to be followed.

4. How would you characterize the administration's role in the semester conversion process?

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Survey questions administered to faculty of Northern Montana College.
Questions regarding the semester calendar.

1. Please describe the <organization> reaction to the decision by the Board of Regents to implement a semester calendar system.

2. Please describe the process being followed at UM to prepare for semester conversion and the <organization> role in the process.

3. Please describe the guidelines give the <organization> to prepare for transition to a semester calendar, including any restrictions, limitations, or mandates to be followed.

4. Please describe the scope of authority and responsibility of the Transition Committee in term of setting policy and decision-making for the semester conversion, as perceived by the <organization>.

5. How would you characterize the administration's role in the semester conversion process?

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*Survey questions administered to faculty of the University of Montana.*