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**MOTIVATION FOR SCHOOL REFORM**

**CEO PUBLICATION  
G 95-14 (290)**

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**August, 1995 (revised)**

Paper prepared for the CPRE Book, Incentive and Systemic Reform  
San Francisco: Jossey - Bass

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## Abstract

The school reform movement seeks higher educational standards for all students, moving authority into the local school to develop new approaches and apply resources appropriately to meet the needs of all students, and new approaches to teaching and learning to meet the educational needs of modern society. The transition is fundamental, and there are very few incentives in place to energize such change. This paper presents an overview of the expectancy theory of motivation and its key implications for job design, goal-setting, and rewards. It then discusses the high involvement framework for organizational management--a framework explicitly based on motivational theory. Finally, it talks about the special issues encountered in motivating involvement in large-scale change. It makes the argument that many of the conditions to motivate school reform are not now in place; creating them will require fundamental change in schools.

## **Motivation for School Reform**

Susan Albers Mohrman

and

Edward E. Lawler

Elementary and secondary schools are experiencing significant societal pressure to improve educational outcomes so that our youth are prepared for a more complex society and increasingly demanding employment. These increased pressures come at a time when the job of educating is made more difficult by the diverse and multi-lingual population of students, and by other sociological trends that result in many children arriving less prepared for school and without the support and active involvement of the nuclear family. In short, schools are being asked to do more under more difficult circumstances. This chapter addresses motivational issues and organizational approaches to promote meaningful employee involvement in addressing this situation.

The systemic reform movement (Fuhrman, Massell, and Associates, 1992; Fuhrman, 1993) has emerged in part to deal with the formidable educational challenges facing our society. Changes are advocated in all aspects of the institutional web that surrounds and constitutes public education. Some of the focus is on reforming the complex maze of policy makers that provide direction and constrain schools in sometimes contradictory ways. Much of the focus of systemic reform is on what happens in schools. It deals with higher standards for all children, more demanding curriculum content and instructional methodology, measurement systems for accountability, and organization for high performance. In short, it asks school personnel to attain higher standards, carry out their tasks differently, and organize differently to do so.

Systemic reform represents large-scale change--i.e., change in the character of an organization that enables it to achieve and sustain new kinds and levels of performance (Mohrman, Mohrman, Ledford, Cummings, and Lawler, 1989). Such fundamental change has been occurring by necessity in many organizations in all sectors of the economy as we enter a period of global competition, deregulation, and increasingly scarce resources, and an era of new technological capabilities in which computer technology and advanced telecommunications play a central role in the production of products, the delivery of services, and the distribution and creation of information and knowledge. Buzzwords abound. Organizations are being "rearchitected" (Nadler, Gerstein and Shaw, 1992), and "reengineered" (Davenport, 1993; Hammer and Champy, 1993)--that is, members are examining their organization and its use of resources and making fundamental changes to become more effective at achieving their mission. Knowledge and expertise are being challenged--the "customer-oriented" organization is being put in place to ensure that the needs of customers --not just the preferences and assumptions of "experts"-- determine organizational activities. On the other hand, knowledge has become the currency of successful functioning, and organizations are striving to become "learning organizations" (e.g., Senge, 1990)--i.e., to be able to generate and disseminate information and knowledge to continuously improve products, services, processes, and organization. This simultaneous need for increased responsiveness to diverse clientele and for increased generation and application of expert knowledge is no less true in schools than in other kinds of organizations.

The changes go beyond mere buzzwords--organizations are clarifying mission, setting stretch goals appropriate to increasingly difficult environments, determining

priorities, focusing resources, eliminating low value-added activities, examining and changing their work processes, reducing bureaucratic activity control and emphasizing outcomes, getting customers actively involved in product generation and service delivery processes, and in so doing changing their shape, governance, and the roles of almost all employees. The environment is dictating that business-as-usual is not adequate. The massive amount of change is yielding higher performance (Galbraith and Lawler, 1994; Lawler, Mohrman and Ledford, 1995) and placing immense pressures on the people involved.

Systemic reform probably requires change of this magnitude. School personnel will have to work to achieve new and higher standards and employ significantly altered instructional practices in order to teach all students for a higher level of understanding (Cohen, McLaughlin, and Talbert, 1993). They will have to establish new relationships with their communities and students in order to tailor the school experience to the needs of the local population and better utilize local resources. One component of systemic reform--school-based management--requires fundamental change in the school organization (Mohrman and Wohlstetter, 1994) in order to get school level participants meaningfully involved in improving school performance.

If school reform truly points to change of this magnitude, the motivational issue becomes paramount. Large-scale change is uncomfortable to people because of the massive amount of personal change, effort, and insecurity that is involved. People are asked to perform their jobs differently, use new approaches, interact differently with others, and focus on new goals. Professionals, who have traditionally cared primarily about professionally defined excellence and organizational autonomy in carrying out their

tasks, are being asked to focus on and be accountable for organizational results.

Organizational experts are being told that clients, patients, customers, and society determine whether the results are satisfactory. People who have focused inward are being asked to focus outward--to see where things are being done more effectively and import new and better practices.

The motivational challenge is particularly thorny in schools, where tenured teachers have watched wave after wave of educational "reform", and skepticism abounds. New practices are often championed by transitory political powers; new school boards and legislatures bring ever shifting directions. And all the while the reality that educators confront becomes more difficult and not amenable to quick fixes. Teachers essentially control their approaches in their classroom (Johnson and Bales, 1994; Meyer and Rowan, 1978; Rowan, 1990; Shedd and Bacharach, 1990); however, there are often adversary relations between teachers and the administration that determines policies and allocates resources, thereby creating the conditions within which teachers work. There is no tradition of monetary incentives in schools; in fact, there is considerable resistance to the use of performance incentives in an atmosphere of distrust, political control of resources, and strong belief in professional control (Shedd and Barcharach, 1990; Odden and Conley, 1992).

It is clear that unless organizational conditions are created so that the huge number of educators are motivated to change the way they deliver educational services, we will not successfully address the educational challenges in our society. In this paper, we will examine basic models of employee motivation and the high involvement organizational approaches that have been found to create conditions where employees are motivated to

participate in organizational improvement. Finally, we will talk about the motivation to change.

This paper restricts itself to the examination of motivational issues of school-level personnel. It does not deal with the equally challenging issues of motivating district-level employees, policy makers, students and the community to change. Systemic reform requires changes in the roles and behavior of all aspects of the institutional network in which our schools are embedded. Given the complexity of this network, however, it is not possible in one short chapter to examine the complex motivational factors at work in all its elements. However, it is our belief that the best place to start is with the educators who are in closest contact with the students, and who collectively deliver the educational services of the school.

### **Conditions for Motivation**

A dominant model underpinning the study of motivation in organizations is Expectancy Theory (Vroom, 1964; Lawler, Lawler, 1973). This theory has withstood the test of time through hundreds of empirical studies in diverse organizations despite fundamental changes in how they operate (Lawler, 1994). It rests on the fundamental premise that behavior is need driven, and that people are motivated to perform in a manner that leads to need fulfillment. It posits that a person's motivation to exert effort in a particular direction is a function of two personally held expectations, or expectancies, and of the value one attaches to the anticipated outcomes of achieving the targeted performance. One expectancy is the extent to which one believes that one's effort will lead to success in the achievement of the intended performance. The second expectancy is the extent to which one believes that achieving the intended performance will lead to important

personal outcomes. Research has found that individual expectancies are not always objectively accurate, but that it is the expectancy that drives the behavior.

Personal value of outcomes is a rough, subjective calculation of the desirability of the various outcomes that a person experiences as a result of achieving a performance. Individuals differ in the value they attach to outcomes because needs vary across people. For any work performance, individuals are likely to experience both positive and negative outcomes. For example, teachers may believe that they will get a sense of satisfaction if they can successfully employ new approaches to achieve increased student achievement, but they also may feel that they will suffer personal costs such as long hours of work and time away from family as they learn and use these new approaches. Expectancy theory posits that positive and negative personal values (valences) are attached to the extrinsic and intrinsic outcomes that are believed to be likely and that are salient to the individual. Positively valued extrinsic outcomes might include recognition and increased pay or promotion as a consequence of achieving high levels of performance. Feelings of satisfaction and accomplishment are positive intrinsic outcomes that might be expected. Stress, social discomfort, and fatigue are possible negatively valued outcomes. Although there are large individual differences in the extent to which various intrinsic and extrinsic outcomes are valued, the behavior of most people in employment situations is motivated by a combination of intrinsic and extrinsic factors (Locke and Latham, 1990; Lawler, 1994). Motivation results from a subjective balancing of the various outcomes.

In short, people are motivated to try to achieve a certain performance if they believe it is attainable and that achieving it will lead to outcomes they value. Using the terms of this volume, the “incentive” to perform well derives from the combination of



outcomes expected; the motivation to perform well is a function of the expectancies and the value of the expected outcomes. Educators, for example, are more likely to exert personal effort to try to implement the new approaches to teaching and to participate in the new organizational approaches that are part of systemic reform if they believe that doing so will make new levels of student attainment possible, if they have faith in their abilities to be successful in the execution of these new approaches, and if they believe they will experience valued personal outcomes, such as satisfaction, recognition, or increased pay, as a result.

### What Shapes Expectancies?

Expectancy theory is a cognitive theory of motivation. Expectancies and the values attached to expected outcomes are believed to be in part a function of individual personalities, but also a function of cognitions gained through past experience, including occupational and organizational experiences. For example, people form an expectancy of their ability to achieve certain performances based on their past experiences of success or failure. This aspect of the organizational motivational cycle relates very closely to theories of self-efficacy (Bandura, 1986), that focus in particular on people's needs to experience a sense of competence, effectiveness and achievement. If teachers have had experience in the past working to implement new approaches that failed to achieve their objectives, they may not have an expectation that working hard to implement the approaches being advocated in systemic reform will lead to improved student performance.

Individuals form an expectancy of what outcomes they will experience based on the outcomes they have experienced in the past as a result of succeeding or not succeeding in

accomplishing a targeted performance. If teachers have had experience working hard to implement new approaches at personal cost and with no recognition or reward, they may expect that successful implementation of new approaches as part of the systemic reform movement will likewise lead to no positive personal outcomes.

Expectancies are shaped by the organization and its processes and structures. For example, does the school have processes and structures that enable teachers to identify and obtain the resources required for successful implementation? Do the reward systems acknowledge excellent performance and the implementation of new approaches? The nature of the work that is done also relates to expectancies. A particular aspect of teaching stands out in this regard: the outcomes of the teaching process depend only in part on teacher performance. Student behavior and performance are also key ingredients of success. If teachers do not believe that students are willing or able to carry out their part of the equation, teachers may have low expectations that hard work on their part will lead to better educational attainment by the students.

In approaching systemic reform, it is not possible to reverse expectancies that have been formed through years of experience. It is, however, possible and desirable to establish new organizational conditions that will enable new expectations to be formed because teachers begin to encounter new organizational experiences. Some of the factors that influence the effort-to-performance expectancy are whether the individual believes he has the skills and knowledge required, whether there is a clear understanding about the nature of the performance that is to be attained and it is viewed as attainable, whether the individual believes that there is situational support for the performance (i.e. resources such as time, information, and supporting performances by other people). There are three

aspects of the organization that are especially related to the motivational cycle, and that can be consciously designed to support the motivation for high performance. These are the goal-setting processes in the organization; the work design, and the reward system. These will be briefly described.

### Goal-Setting

*Goal-setting* is a linchpin of organizational motivation. Goal-setting theory (e.g., Locke and Latham, 1990) is highly compatible with the expectancy theory of motivation (Lawler, 1994). The effort--performance expectancy depends on the existence of a clearly defined performance. Goals define the targeted performances and provide the gauge against which individuals measure their own success and the organizational members measure the success of the organization. In a sweeping review of the goal-setting literature, Locke and Latham (1990) have concluded that in employment situations, goals and incentives are highly effective in motivating behavior, even when employees are strongly intrinsically motivated. They dispute conclusions drawn by Deci and others (Deci and Ryan, 1985) that the use of extrinsic outcomes such as rewards will undermine intrinsic satisfaction. In the arena of organizational change, numerous empirically based models emphasize the importance of shared vision and goals in energizing and directing change activities (e.g., Tichy and Devana, 1986); Beer, Eisenstat and Spector, (1990); and Bennis and Nanus, (1985).

Goals are an important, even if underutilized, aspect of motivation in schools. A number of models of effective schools have found that they are characterized by a shared vision and shared goals (Wohlstetter and Smyer, 1994). Schools where teachers' attention is focused on clear, coherent goals do a more effective job of educating students

(Rosenholtz, 1985). Multiple and sometimes conflicting goals and the lack of goal consensus has limited the ability of schools to establish clear, shared goals (Rowan, this volume). Beyond that, norms of professional non-interference have limited the ability of school districts and schools to establish standards and objectives that are experienced by teachers as anything other than efforts to control them (Shedd and Bacharach, 1990). In the absence of clear and shared school and/or district level goals, teachers have exercised freedom to establish their own outcome standards (Rowan, 1990), with little realistic feedback about whether these are aligned with the needs of the clientele.

### Design of Work

The *design of work* heavily influences performance expectancies, and consequently motivation. Motivating characteristics of work include variety, the performance of a whole task (task identity), and task significance, all of which contribute to personal meaningfulness. In addition, feedback provides knowledge of results, and autonomy provides a sense of responsibility for work outcomes. Well designed work promotes psychological states that are associated with intrinsic satisfaction and promote high performance (Hackman and Oldham, 1980). The jobs of teachers would appear to be potentially quite motivating--given the importance of the task to society, the variety and relative autonomy inherent in being fully in charge of a classroom, the immediate feedback available from students.

Given the importance of teacher skills in affecting student achievement (Darling-Hammond, Wise, and Klein, 1995) motivation to increase competencies is a particularly

important issue to consider in the design of work. Here, the way the school is organized can detract from the motivational quality of the work. Specifically, how teaching jobs are structured and the organizational processes at work can work against the collective, collegial attention to continual improvement by closing off meaningful feedback from peers about performance and meaningful discussion among peers about school improvement (Shedd and Bacharach, 1990).

Work design theory points out that some work requires a team, because performance necessarily results from the interdependent work of multiple people. In these situations, team work design should optimize the motivating characteristics of work at the group level--i.e., the team's task should have variety, identity and significance, the team should get feedback, and the team should be as autonomous as is feasible (Hackman and Oldham, 1980; Hackman, 1987). In such settings, designing work to optimize individual performance may actually detract from overall performance. In schools, for instance, it has been suggested that significant improvement of performance cannot be achieved by concentrating on the behavior of individual teachers in their individual classrooms. Although the work of teachers would appear to be highly motivating at the individual level, true task identity is not possible given that the education of students is a complex composite of a myriad of educational experiences occurring concurrently in different classes and longitudinally across a series of experiences. Reform intended to focus on overall educational outcomes will depend on achieving better coordination and collaboration between the multiple teachers who collectively educate populations of students (Shedd and Bacharach, 1990). A team work design may enable such coordination, and provide a more motivating work environment.

## Rewards

Motivation also depends on the expectations for achieving valued extrinsic outcomes, and thus is related to the *reward system of the organization*. The work of Lawler (1990) and others has shown that money can be an important motivator when significant amounts of it are delivered in a manner that is tied to performance, and when a line of sight exists for individuals so that they can see how their personal activities contribute to the performance for which they are rewarded. There are many possible purposes for a compensation system, including establishing a culture and attracting and retaining a qualified work force, and some organizations choose not to use it as a performance motivator by not making pay contingent on performance. Using compensation as a motivational tool to foster behavior that enables the organization to achieve its mission depends on linking pay to the outcomes or performances that the organization requires in order to achieve its strategy. For example, if the strategy of an organization calls for increasing particular outcomes such as customer responsiveness or quality of service, rewards should be linked to performances that achieve targets and result in improvement in these areas.

Although there is increasing experimentation in school districts with linking rewards to well specified standards (see Rowan, this volume), schools have in the past not been very successful at linking rewards to performance. The political systems in which schools exist create a context in which the public may clamor for more linkage of rewards to performance but teachers do not believe that the money for such rewards will actually be available. In addition, teacher norms of equal treatment run deep, their distrust of administrator's ability to evaluate performance objectively is strong, and there is not

general agreement on standards or that there are tests which accurately measure the important aspects of a teacher's performance. All of this results in strong resistance to attempts at differentiating pay (Odden and Conley, 1992).

Most attempts at pay for performance in schools have been merit pay systems, often based on measures of performance that focus on behaviors that are easy to measure rather than important for student achievement (Shedd and Bacharach, 1990). Such approaches fit with a traditional organizational mode of hierarchical control, discourage learning, and can promote competitiveness rather than the cooperative, collegial behavior required for a school to be excellent. Odden (this volume) argues that pay for performance was not appropriate in bureaucratic school organizations, but may be more suitable in emerging collegial, school-based management settings.

The appropriate level for rewards--individual, team, or a larger organizational unit such as a school--depends on the level at which performance is attained (Lawler, 1990). If the education of students is indeed a collective endeavor, it may make more sense for rewards to be delivered at a team or school level. Individual contribution may be acknowledged by tying compensation to a teacher's mastery of an enhanced repertoire of skills and knowledge required to effectively carry out new technical approaches or expanded roles (Firestone, 1994; Mohrman, Mohrman and Odden, in press). Skill-based pay has been particularly popular in team-based organizations where the flexible deployment of its members to perform multiple tasks is one of the performance improvement tools available to the team (Ledford, G.E., 1990). The organizational and work design in many schools currently isolate teachers and limit the feedback and interaction that allow ongoing teacher development, which may limit individual and

collective skill development. The development of teachers' skills and knowledge is more likely to occur in schools where there are strong norms of collegiality (Little, 1982) and norms that support skill development and high performance. A combination of team or school-based rewards and a base pay system that rewards development of competencies would seem to be compatible with motivation of teachers for individual development and school performance improvement (See Odden, this volume).

### **Involving Teachers in Performance Improvement**

Organizational theorists writing about high performance organizations increasingly advocate system-wide change to enable the new levels and types of performance that are required to successfully enact strategies to be successful in changing environments (e.g., Galbraith, Lawler and Associates, 1994; Nadler, Gerstein and Shaw, 1992; Mohrman and Cummings, 1989). High involvement management is a systemic change model that describes approaches to organizing that create an environment where employees are motivated and empowered to become active in improving organizational performance (Lawler, 1986). These approaches strive to create organizational designs where motivating conditions are in place; where employees develop strong expectancies of being able to perform successfully and that valued outcomes will result. The basic aim is to move away from the traditional control-oriented hierarchy where managers at the top are responsible for strategy, direction, and organizational performance, and where employees feel victimized and constrained by a context they cannot influence. High involvement management establishes a situation where control is spread throughout the organization, all organizational members focus on organizational performance and contribute to strategy and direction, and employees are able to influence decisions that shape their expectancies. For



example, teachers are able to flexibly apply resources and methodologies to attain educational goals and to participate in the determination of school goals in the first place.

High involvement management represents a systemic change involving most aspects of the organization rather than a program or an attempt to employ one key lever such as training or rewards. Systemic change is increasingly advocated in the educational literature where it is recognized that schools are not currently designed to promote the collegial interaction and control required for the level of development and coordination that will be required to support new educational standards of higher order thinking for all children (Shedd and Bacharach, 1990; Elmore and Associates, 1991). Many school restructuring proposals are quite compatible with the high involvement framework; they often focus on how to empower teachers, students and parents to exercise increased influence in school decisions (Elmore, 1990). School-based management, an important element of systemic reform models, is an approach to restructuring which in its full embodiment requires the creation of a high involvement school (Mohrman and Wohlstetter, 1994). Elsewhere in this volume, Darling-Hammond describes high-performing schools that have most of the characteristics of high-involvement organizations.

The high involvement framework entails increasing the presence of four key organizational resources at the technical core of the organization. These resources are believed to be closely linked to employees' capability and motivation to contribute to enhanced performance. Briefly, these resources are:

1. *Information* about the performance, strategy, mission and goals of the organization as well as ongoing task feedback to underpin operational decisions in the organization. This information enables individuals and teams to form goals that are in

alignment with organizational direction, and provides feedback that enables better targeting of activities, identification of areas that require development, and informed systematic problem-solving and work process improvement. Receiving ongoing feedback can also promote a sense of accomplishment when goals are accomplished and performance is improved.

2. *Knowledge and skills* that enable employees to more fully understand and contribute to the improvement of organizational performance. Expansion in this arena contributes to the individual and team expectations of successful performance as well as to the number of ways they can contribute to performance and consequently to job variety.

3. *Power* to make decisions that influence organizational practices, policies and directions. This enables employees not only to have more influence about what work they do and how they do it, but also about the organizational goals and the context or situation in which work is performed. Ideally, employees can create organizational conditions that enhance their expectations of successful performance. They can collectively set goals that they believe in and experience satisfaction when they are accomplished.

4. *Rewards* based on the performance of the organization and the capabilities of individuals. These increase the expectations that individuals will experience valued outcomes as a result of their effort to achieve new skills required to support new organizational directions and to contribute to organizational performance objectives. This aspect of the high involvement model aligns self-interest with organizational performance.

High involvement frameworks have been found to be particularly appropriate in settings where the work is non-routine and employees have to deal with high levels of variety of input and uncertainty about what means will lead to what ends. Under these conditions work cannot be fully programmed in advance, and employees are called upon to use judgment and tailor approaches to the case at hand. These conditions characterize education (Rowan, 1990; Rowan, Rauderbush, and Cheong, 1993). High involvement is also appropriate where there is high interdependence between various contributors--i.e., where the work of various contributors have reciprocal impact and needs to be coordinated in a manner that can't be fully preprogrammed (Mohrman, Mohrman and Lawler, 1993). In private sector service and manufacturing organizations, the implementation of high involvement practices has been found to positively influence a number of organizational conditions including levels of work quality, innovation, introduction of new technology, customer satisfaction, and quality of decision making; employee outcomes such as quality of work life and satisfaction; and financial outcomes such as efficiency and competitiveness (Lawler, Mohrman, and Ledford, 1995).

Different organizational design features can be employed to ensure that information, knowledge and skills, power, and rewards are available to employees. Lawler (1992) has identified three levels of employee involvement , each of which offer different improvement potential and impact the expectancy motivational framework in different ways. These are: (1) parallel suggestion involvement; (2) job involvement; and (3) high involvement. These three approaches represent an escalating commitment to changing the organization to promote high-involvement. These will be described briefly.

#### Parallel Suggestion Involvement

Parallel suggestion involvement includes mechanisms for involving employees in solving problems, generating ideas, and making recommendations that influence how the organization operates. This approach provides avenues for employees to address aspects of the situation in which they work and the way in which work is done that can be changed to enable more effective task performance. Quality improvement teams and task forces are examples of parallel suggestion involvement. These approaches are parallel to the ongoing activities of the organization in the sense that they coexist with a more traditional work organization--people participate through special participatory forums and carry out their regular jobs in their normal work setting. Parallel structures have been advocated in the organizational literature as a way to enable two kinds of activities to go on simultaneously in an organization--efficiency in carrying out work processes and critical examination and improvement of the organization (Stein and Kanter, 1980).

Parallel suggestion approaches increase the power of participants because they provide mechanisms for raising issues to the official agenda of the organization. In that sense, they enable employees to begin to deal with some of the obstacles to performance, and may be expected to yield changes that will improve expectations of being able to successfully perform. Participants in parallel structures generally receive increased information and may develop new skills. The increases in these two resources are particularly noticeable in organizations where there is widespread rather than limited participation. Sometimes parallel involvement is accompanied by rewards, often in the form of a gainsharing or bonus program funded from the savings generated by the involvement process.

Parallel suggestion involvement has been quite successful in generating improvements to the way work is done, and organizational participants often report high levels of satisfaction with the opportunity to influence organizational decisions. However, this approach does not represent a major shift in the way control-oriented organizations deal with most issues. Generally the allocation of resources or changes of policy that are recommended by the involvement groups remain the purview of management; implementation depends on approval and support from a management structure that may remain relatively unchanged. The basic design of the organization remains intact except for the superimposition of the “parallel” structures on the organization. Thus, parallel suggestion involvement may not strongly influence motivation in the day-to-day work of the members. Furthermore, since most U.S. organizational improvement programs do not give all employees the opportunity for ongoing participation, the sense of accomplishment that comes from such involvement is often limited to a small number of employees. In fact, a split may be created between those who participate and those who don’t, making it hard to generate employee support for some recommendations (Ledford, Lawler and Mohrman, (1989). Finally, changes generated through this approach may lack adequate management support for full and lasting implementation.

More recent approaches to parallel involvement, including advanced total quality management programs (Deming, 1986; Juran, 1989) and some reengineering approaches (Davenport, 1993), have in some companies created the conditions for successful stable use of parallel approaches to generating continuous organizational improvement. These companies have changed the role of management to support change generated from those doing the work, and in some cases delayered the management structure and downsized the

staff groups that once were relied on to generate and enforce changes from the top. They have provided participants with more powerful organizational process improvement tools that lead to a very systematic critical examination of the organizational processes that are most strongly related to organizational outcomes and that deliver value to the customer. They have incorporated computer and telecommunication technology in new ways that extend capability of their human resources rather than just supplement it. Even in knowledge oriented and service organizations, great strides in productivity have been made by following systematic processes, focusing on organizational outcomes and customer-defined values, opening up the assumptions of organizational participants to critical scrutiny, and being willing to use information technology that changes what people do. The resulting productivity strides have freed up organizational resources to escalate the rate of learning and the generation of innovation.

In some cases, the changes in the work processes of the organization that are generated by task teams and other parallel structures stimulate the kinds of organizational design changes involved in the more fundamental approaches to employee involvement that will be described in the next two sections. New approaches to the design of organizations enable these task teams not only to generate new ways of doing work, but also to create an organizational design that is compatible. The socio-technical approach to work design starts by critically examining the work processes and then strives to create an optimal social system in which employee motivation and performance outcomes are jointly optimized (Pasmore, 1988). In many cases new work processes require an organization to be designed so that discretion is moved downward and decisions are made laterally

between co-workers. The next level of high involvement, job involvement, is made possible by such redesigns.

Job Involvement:

Job-involvement focuses on designing work in ways that motivate high levels of job performance. Enriched jobs consist of a variety of tasks that comprise a whole piece of work, ongoing feedback about performance, and influence over how the work is done. Direct responsibility for a defined customer base enhances the perceived significance and often the personal meaningfulness of work. Individual job enrichment provides a direct line of sight between an individual's effort and job performance, and with good measures, it is possible to attach a performance dependent reward. This job-involvement approach is appropriate when the technology of work allows an individual to complete a whole task independently.

Increasingly, the principles of job design are being applied in team settings, with the establishment of teams that have responsibility for a larger piece of work. This design allows interdependent contributors to work together, and to have complete responsibility for a set of customers. In school settings, this might be a teaching team or a "house" in a larger school. These empowered teams may have responsibility for the application of resources (including their own internal expertise), for setting performance targets and determining of how best to accomplish them, and for working collaboratively and influencing each other in order to continually improve performance. When teams are composed of multi-discipline contributors, they collectively have the responsibility for coordinating across disciplines. The team approach frequently results in teams doing many of the tasks previously done by managers and by specialized support groups. Teams

designed according to these principles have been referred to variously as self-managing teams, semi-autonomous work groups, or workteams. The team approach may be accompanied by a team incentive system, and is often reinforced by a skills or competency-based system whereby different team members may be skilled in different aspects of the “whole task”, and each member is paid based on skills demonstrated and utilized. This approach is often used in combination with parallel suggestion involvement, so that teams have a way of influencing the larger organizational situation in which they perform.

Job involvement has significant implications for how an organization is structured and managed. Significant authority is vested in the enriched job or team. Individuals and team members have to develop new and expanded skills and knowledge, receive ongoing performance feedback and other information such as customer requirements and trend data relevant to how they go about their work, and take responsibility for an expanded range of decisions. Team members perform their own coordination and scheduling, and often their own personnel functions such as hiring and firing, and attending to the development needs of team members. They may also perform tasks previously carried out by support departments, such as guidance counseling. Team rewards may be a part of a team model, although organizations often have teams without putting in place true team rewards. A frequent approach is to alter the individual reward system to be based on competencies that the team needs, and/or to retain an individual merit component that is weighted by contribution to team performance. Increasingly, peer evaluation is part of the team process.

Job-involvement approaches particularly emphasize intrinsic satisfaction, since they strive to create conditions where the individual or the team controls most factors that



influence performance. Extrinsic satisfaction may be addressed by a competency-based pay system and/or team rewards. It should be noted that for some individuals, team rewards actually are perceived as lengthening the line of sight--by rewarding them for performances where they have to depend on other team members. On the other hand, team structures increase the opportunity for positive social outcomes, such as the satisfaction of working collaboratively with a group of peers and the opportunities for feedback, recognition, sharing, and mutual learning.

Unlike parallel suggestion approaches, job involvement affects the day-to-day work activities of all individuals. It is not a special or parallel activity; it is a new way of managing and carrying out the work of the organization. This approach to organization often moves support activities into the teams, and members are often cross-trained to play these roles. Formal management positions are often substantially reduced, as team members take on a variety of management responsibilities. A variety of leadership roles emerge, often occupied by team members. Job involvement approaches require substantial change in the roles of people in remaining management and support positions.

Organizations have reported large performance gains through the use of this approach. The limitation of job involvement lies in its almost exclusive focus on operations at the individual or team level. This focus can lead to sub-optimization, if individuals or teams focus entirely on their own bailiwick, and fail to consider how they need to contribute to the larger organizational unit (Mohrman, Cohen and Mohrman, 1995). When the activities of all teams and individuals are shaped by a common context, such as overall policies and resource allocation of a school, job involvement may provide insufficient employee influence on these organization-wide issues. These limitations have

led many organizations to pursue a higher level of involvement, organizational or business involvement.

### Organizational Involvement

The organizational involvement approach focuses all employees on the success of the organization, not simply on their own job success or team success. This approach often incorporates parallel and job involvement. It may include enriched jobs, work teams, and task teams that focus on school-wide process and organizational improvement. It goes beyond these approaches in that it designs the organization to make it more likely that employees will be concerned about and knowledgeable about what is required for the school as a whole to be successful. Employees will continue to receive information about their own or their team's job performance, but they also receive information about how the overall organization is performing. They develop knowledge about the organization as a whole, how strategy is formed, environmental pressures, policy formulation and organizational trade-offs, and financial and resource optimization. They can put on an organizational hat when making decisions rather than being advocates only for their piece.

Mechanisms for influencing decisions may include multi-stakeholder governance groups. Another structural approach is to break up the larger organization into mini business- or customer- focused units rather than functional units, and to vest in each unit a larger set of decisions, such as strategy, resources, structural decisions, and whatever policy decisions do not absolutely have to be uniform across the larger organization. This has the impact of breaking up larger organizations into smaller units with entrepreneurial motivation to optimize their performance.

School-based management when taken to its logical end-point is an embodiment of organizational involvement (Mohrman, Wohlstetter and Associates, 1994). Within a larger school, houses or schools-within -schools is a way to break down a large impersonal system and create a smaller social system where people truly feel they can influence and be held accountable for the unit's performance, and by implication for the full education of a defined group of students. Accountability is a key aspect of this approach. These performing units should be independent enough to control most aspects of their functioning. Services can be shared between them where definite economies of scale are offered and where it can be demonstrated that these shared services can meet the needs of each unit. Responsiveness to the performing units should be the performing accountability of all shared services. Their evaluation should be performed by these internal customers.

Tying extrinsic rewards to organizational or mini-business performance is an important part of organizational involvement. These rewards should be significant enough to convey a clear message that it is not sufficient to focus only on the job you do individually or even on your team alone. Individuals may also be rewarded for their contribution, but because they are asked to contribute in many ways and at different levels, a competency-based pay system is better suited than a job-based base pay system for acknowledging individual contribution. A combination of these two approaches to rewards creates a situation where individuals are motivated both to improve their individual competencies and to contribute to the larger organization. It also makes it more likely that norms will develop where peers will take an interest in each other's development and recognize each other for outstanding performance because everyone will do better if each person does better (Lawler, 1994).

Organizational management positions are kept at a minimum because most control is now vested in performing sub-units. However, the leadership role of organizational management is more important than ever, going far beyond an administrative or control function. The organizational involvement model requires leaders who can work with members of the organization to create a shared direction; to ensure that multi-directional influence is effective; to ensure that effective organizational structures and meaningful goals are in place and that resources are being allocated throughout the organization in a way that results in overall organizational performance; to monitor overall performance as well as the performance of each performing unit; and to initiate activities to further develop organizational capabilities of individuals and teams, and improvement of the work processes that are employed.

The organizational involvement approach can potentially create a superior motivational environment by combining intrinsic and extrinsic sources of motivation, and by creating joint focus on individual, team and organization-wide performance. It calls for the most extensive change in organizational design and roles, and for a simultaneous organizational focus on performance and capability development at all levels. For schools, this organizational design approach complements the recognition within the educational literature that school reform will require systemic change--in instructional approaches, teacher capability, and the situation in which teaching occurs (Rowan, this volume). It takes an organizational view of capability development, and puts the responsibility for developing a situation where effective learning can occur square on the shoulders of organizational participants. In her chapter describing schools that are characterized by high levels of organizational involvement, Darling-Hammond finds a

strong positive effect on student outcomes which is of course the ultimate performance toward which high involvement is directed.

### **Motivating for Large-Scale Change**

We have argued that the systemic reform movement calls for a large-scale change in the educational establishment, and that the generation of school-level improvements may require that schools become high involvement organizations. The conversion to high involvement management is in itself a large-scale organizational change; one that may be required to unleash the vast potential of teachers to find better ways to educate all children. Teachers and principals are not being asked simply to do their jobs better; they are being asked to do different jobs. Principals are being asked to lead an organization as it transforms itself organizationally, and as the participants collectively seek new and more effective approaches to teaching and learning. Teachers are being asked to participate in improving the capabilities and performance of the school; to collectively generate new approaches; to generate new ways of relating to each other, to students, and to the community.

Establishing a high-involvement organization--where the conditions are in place for participants to be motivated to continually improve organizational performance--entails the mobilizing of large amounts of effort. The transformation process requires developing systems to measure results and share information, developing broader and deeper skills and knowledge, putting in place rewards for performance, and establishing effective new structures and processes for school participants to exercise influence in governance, organizational improvement and enhanced service delivery.

A major challenge in producing large-scale organizational change is motivating individuals to change in such fundamental ways to assume new and expanded responsibility. As indicated by the expectancy model, motivation is shaped by the expectations of positive and negative outcomes. Motivation for significant change entails making clear the negative consequences of not changing as well as the positive consequences of changing. What are the individual, institutional and societal costs of maintaining the status quo? The benefits of changing? Motivation requires a clear picture of the intended performances. A shared understanding of the new approaches will have to be developed so that there is a picture of the performances for which the organization is striving. Standards is one piece of this picture, but it includes far more. Large scale change generally entails a change in the definition of successful performance. For example, schools may need to see their responsibility as organizing and teaching in a manner that meets the needs of their clientele, not in a way that is a generalized picture of professional practice. This requires changes in the roles of individuals and in what it means to be competent and perform well. Educators will need to develop new understanding of the skills they must develop to be effective in a high involvement organization, the information that will be relevant to them and the way that they will be able to influence how things are done. These changes may violate people's assumptions and perhaps even values about how the organization should run and what their role should be, and some educators may not be able to develop comfort with their new roles in a high involvement organization.

Many factors work against being able to create positive motivation to change. People fear losing their positions, comfort, and status. They don't want to work as hard or

make the personal sacrifices that are required by large scale change--for fundamental organizational change occurs simultaneously with ongoing work. They resist being put into a situation where they may not be fully competent. They have low expectations that this change will be lasting or successful--they have seen many fads come and go. Managing through this uncertainty and negativity requires using the collective capabilities of the organizational employees to focus on purposes, open up one another's thinking, consider and try out new approaches, learn from one another, achieve, celebrate, and build on successes, and gradually build up a set of positive expectancies concerning the new directions. It requires tearing down the walls that have separated people from one another (Senge, 1990).

Large-scale change is facilitated by strong leaders who can define a compelling case for change, define the new performance requirements, and create the conditions for the immense amount of learning and personal transition that has to occur. Although leadership can and should be shared throughout the organization, most successful large-scale change occurs when the formal leader is a strong visionary and enlists organizational members in the collaborative work of effecting fundamental change (Bennis and Nanus, 1985). Where the workforce is represented by unions, their involvement as partners in the process of change has been found to contribute to the success of the implementation of high involvement practices and to their impact on organizational performance (Lawler, Mohrman, and Ledford, 1995).

Change is facilitated by very clear performance definitions, and by creating conditions of accountability where the transition cannot be construed as voluntary--i.e., a social system such as a school cannot achieve fundamental change and substantial

performance improvement if change is viewed as optional by employees. Schools where large members of teachers refuse to participate in improvement activities have great difficulty effecting change (Robertson, Wohlstetter, and Mohrman, 1994.) The performance management system in the organization, particularly the goal-setting and feedback systems are critical during transitions. These systems target performance, provide an opportunity to learn, enable the organization to measure success, and demonstrate that the organization is serious about the change.

A number of factors in schools make change of this magnitude especially difficult and present special challenges. The loose coupling of various aspects of schools (Weick, 1976) and the isolated functioning of teachers work against taking a systemic approach to change. A school community will have to be established in order to successfully implement high-involvement approaches. Schools do not have a tradition of strategy formulation and goal-setting, nor are accountability and performance management systems well developed or accepted. School participants will have to get used to examining results, talking about goals and how to achieve them, watching trends collectively, problem solving, and being held accountable. Finally, administrators are frequently not encouraged to be leaders, either by their bosses or by the people they would lead. In fact, the wedge between teachers and administrators in many school buildings turns school-based management into tug-of-wars for power and control between the two parties (Wohlstetter, Smyer and Mohrman, 1994). Principals will have to be selected, developed and supported in their new leadership role, so that they can provide support to their staff as the school community goes about the process of generating change and improving performance.



Preceding sections of this chapter provided a theory-guided picture of an organization that builds on the conditions for motivation for school improvement. This section has argued that creating these conditions for high involvement is itself a fundamental organizational transition for schools. Surely if educators are in large numbers to seriously embark on change of this magnitude they will need evidence that it will lead to more effective schools. There is a pressing need for experimentation and evaluation of new forms of school organization.

There is already some supporting evidence. A number of models of effective schools are currently yielding demonstration schools that have a number of high-involvement characteristics (Wohlstetter and Smyer, 1994): these include the School Development Program schools (Comer, 1980); Accelerated Schools (Levin, 1987); and Essential Schools (Sizer, 1984). Darling-Hammond (this volume) has described high performing schools with many high-involvement characteristics. Robertson, Wohlstetter and Mohrman (1995) have found that school-based management schools having success in reforming their approaches to teaching and learning were also characterized by high levels of knowledge and skill development, information sharing, and many ways of exercising influence.

More research is required to fully test the efficacy of the high involvement approach. Much of this will have to be action research: the creation and evaluation of field demonstration pilots and naturally occurring experiments. Models will have to be generated and tested for new information systems, skills and knowledge development approaches, structures and processes for sharing power, and rewards that fit the technology and professional nature of teaching. The application of new ways of rewarding

performance, in particular, is highly relevant to the question addressed in this volume: how to provide incentives for school reform. In addition, new approaches to the development and role definitions of school leaders are required.

### **Conclusion**

This chapter has argued that systemic school reform requires large-scale change in schools. It entails fundamental changes in how educational services are delivered and how expert resources are deployed to meet the needs of the population being educated. It changes the goals, content, and pedagogy of schools. It requires new skills and knowledge and new organizational capabilities. Effecting such change requires the creation of motivational conditions where educators believe that such change is possible and that it will lead to valued outcomes.

This chapter briefly reviewed the basic expectancy model of motivation, and the closely related arenas of goal-setting, job design and reward theory. It then provided an overview of three different approaches to the creation of increased employee involvement. The high involvement framework is an approach to designing organizations that build in the conditions for motivating the involvement of teachers in creating successful reform.

Many of the organizational approaches described in the high involvement framework are in place to some extent in high performing schools. Some schools have broken up into smaller units and provided a group of educators with increased autonomy in determining how best to educate their group of students. Advanced school-based management districts often remove many contextual constraints and enable school level participants to try out approaches that they believe will lead to better performance.

However, many schools remain populated by teachers who stay in separate classrooms with little or no collective learning or engagement in improvement activities. For many districts, the road to being able to prepare a population for the twenty-first century is a long one. Judging from the experiences of many organizations in other sectors of the economy, educators may be at the front end of envisioning what schools will look like in the future, and the change process may be just beginning.

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