ADAPTATION STRATEGIES

Agenda Activators

A high-potential leadership program delivered at such universities as Cornell, Lehigh, and the University of Virginia identifies four competencies critical in helping higher education leaders move past turf battles and implement change.

Samuel B. Bacharach

College and university business officers suddenly found themselves on the front line when dealing with the financial crisis of 2008. During that time, a heightened sense of urgency called for swift action, initially to keep institutions solvent, but at some schools the need for change was soon overshadowed by resistance and the "leave-well-enough-alone" model endemic in higher education. Today, while the extreme sense of urgency has dissipated, the longer-term challenges are magnified, and the CBO remains front and center in his or her involvement in developing solutions.

During the past decade, it became increasingly clear that if change would become a continuous process, key individuals would have to master the skills for moving agendas in the complex setting of the university. My colleagues and I at the Bacharach Leadership Group developed the "Agenda Mover" program to meet this strategic imperative.

The primary goal of the agenda mover program is to give university leaders the interpersonal and intragroup political skills that they need to become active change agents with the capacity to move forward and accomplish identified goals. Our focus is on helping participants develop the core competencies necessary to keep pressure on high-priority items, accomplish them, and create lasting change in the university environment where turf, resistance, and inertia are commonplace.

We've identified four critical competencies that contribute to college and university leaders' ability to move past pushback and achieve the institution's priority goals: (1) developing the contextual awareness of the environment into which they are introducing change; (2) understanding the capacity and benefit of anticipating the agendas of others; (3) mobilizing initial support; and (4) negotiating the buy-in.

Following is a description of the process and some examples of how it is working on college and university campuses.

Developing the contextual awareness of the environment into which they are introducing change. Universities and colleges are breeding grounds for tradition, and some change efforts are going to strike at the chord of "it's always been done that way." Agenda movers are aware of the possible minefields that they could step into when proposing their change initiative.

Understanding the capacity and benefit of anticipating the agendas of others. Every change effort will affect someone. Agenda movers sense who will be affected by the proposed change, and work on creating solutions that address the fears and anxieties of others.

Mobilizing initial support. Agenda movers know that they can't do it alone. To get their ideas off the ground, agenda movers have to attract some support to move forward.

Negotiating the buy-in. For agenda movers, the "buy-in" results in real institutional support for their ideas. However, that support is often given individually, and sometimes it isn't freely given. Agenda movers know that they have to enter the political arena to see that their ideas are implemented.

Develop Contextual Awareness

For change agents to move an agenda forward, it is critical that they have the skills to analyze the institutional context in which they are trying to create change, and to appreciate the unique challenges of creating change in their particular institution. While some business officers may see their idea for cost-cutting and creating efficiencies as a no-brainer—especially if the bottom-line numbers are attractive—it is a mistake to charge ahead without developing a sensitivity to individual institutional constraints.

For example, at my home university, Cornell, in Ithaca, N.Y., any change model has to take into account a number of such factors, including:

The land-grant mission of the university. For Cornell, this has historically meant to offer classes and programming that is both more practical in nature and tailored to nontraditional students alongside the traditional classical curriculum. Many reflexively view any change effort—positively or negatively—through the lens of the land-grant mission.

The tension between the center and the periphery. In any university, not only Cornell, the question is where is the power? Where are decisions made? At the center? Or in the units? If the change effort upsets the current balance, then attempts must be made to reevaluate and readjust.

The strength of college-based business officers. Cornell has more than 100 fields of studies, spread across four global campuses. In this environment, the business officers of the individual colleges or schools work closely with their deans to ensure the financial health of their individual units. If a change effort will necessitate or generate substantial sums, it is imperative that the business officers be involved.

Hear More From Samuel Bacharach

Listen to a presentation at the NACUBO 2017 Annual Meeting, in Minneapolis, July 29–August 1, "Leading for Discovery and Delivery," based in part on the ideas in this article.

The tradition of unit autonomy. At Cornell, not only are the colleges and schools accustomed to making their own decisions, but the individual academic departments make their own hiring and tenure decisions (with the favor of the dean and provost). Cornell's innumerable institutes and centers take action based on their perceived best interests, with little interference from the center. If a change effort, such as the introduction of a new budget model, impedes on the status quo, it must be with deliberate mindfulness on the part of the leader.

Any change effort needs to be framed in the institution's current reality, and with the interests and needs of the institution in mind. What works well at one place doesn't necessarily mean the same strategy will work at another. The cookie-cutter approach to change does not work, especially in higher education.

Agenda movers learn to immerse themselves deeply in their organizational milieu. With a firm sense of the past and the present, participants are better positioned to understand blocks and barriers that may prevent their agenda from moving forward. Having delivered the program in such diverse environments as Lehigh University, Bethlehem, Pa; University of Virginia, Charlottesville; and Cornell, it was essential that the current challenges be viewed through the lens of structure, tradition, and culture. Universities are different, and agenda movers have to appreciate the differences in context. Without the understanding of the subtlety of the context, any effort to achieve efficiencies would fall short.

In one instance, a university launched a major IT transformation that meant moving to "software as a service" and developing its cloud capacity. While the efficiencies gained would be apparent, when there was an effort to move the initiative forward, resistance emerged because of the university's tradition of college autonomy.

As the key change agents began to think in an agenda-moving mindset, they began to appreciate that each unit had its own reasons for resistance. The centralization of data, the control of hardware and software, and the implied reduction in staffing dwarfed any case for efficiency. Combine that with faculty turf concerns, and it became clear that unless the central IT team began to think in political terms and understand other parties' interests, the transformation process would be hampered.

To determine the type of effect anticipated changes may create, it is important for agenda movers to understand the dynamics of turf and power.

Anticipate the Agendas of Others

To determine the type of effect anticipated changes may create, it is important for agenda movers to understand the dynamics of turf and power. Most institution leaders fail to appreciate the extent to which universities are not harmonized bodies, but, rather, are political systems. Therefore, those charged with change management must first map out the stakeholders' terrain. Who are the top dogs, the organizational decision makers? Who are the gurus—those individuals with no real authority, but who are universally respected and have organizational influence? Who are the gatekeepers? Gatekeepers are often liaisons to the top dogs. Because of these subtleties, effective agenda movers are tactical and always asking "Whom do we approach first?"

Should business officers go directly to the president or provost, or approach other gatekeepers, such as themselves? Or should they meet with the gurus? Agenda movers understand that going to the wrong party first can kill a change initiative. Consequently, much deliberation should be given to prioritizing the contacts that will be most instrumental in positively affecting a particular agenda item.

Having understood the power players, agenda movers must anticipate the intentions of others. What is *their* change agenda? In a university setting, it is essential that business officers take the time to thoroughly understand the intentions of others.

For example, are individuals looking at the change agenda viewed as traditionalists? Do they think that the core mission and program of the university is defined and shouldn't be tinkered with too often? Are they adjusters who think that they should cross the bridge when they come to it? That is, should the university wait to deal with issues until the challenges are immediate and clearly articulated? Do potential partners pursue a revolutionary agenda—do they push for radical change? This collection of viewpoints can become a roadblock, closing off opportunities for change.

One university where we conducted training was concerned with how to gain such internal traction for its effort to move an e-learning program. The traditionalists, disproportionately from the humanities and social sciences, saw very little role for an online initiative. The tinkerers, from the medical school and engineering, saw the possibility, only if such an initiative were to play a supplemental role to traditional pedagogy. Many in the business school who saw the outreach and profitability potential had a more revolutionary stance. For business officers moving their agendas ahead, it is essential that they categorize each of these reactions.

Mobilize Initial Support

In a university setting, inertia and resistance are to be expected. Once agenda movers figure out where others are coming from, they have to address specific criticisms and challenges. Even those who may like the initial idea—their allies—may have specific hesitations. Agenda movers do their homework by working out the arguments that others may make against their ideas.

While the "got-you" game is part and parcel of academic life, more often than not, challenges will be subtle and will take the form of the "yes-but" game. The answer won't be an outright "no" but will sound more like, "I see where you're going, but … ."

Agenda movers must prepare for this reaction or response and develop a sense of how the challenges to the agenda items will be framed. Some classic responses are: "Your idea is too risky;" "Your idea will make things worse;" "You don't know the issues well enough;" and "It's been done before." By anticipating the arguments of resistance, change agents can develop solid ideas that counter the negative pushback and enhance the appeal of their proposed initiative.

Unfortunately, would-be agenda movers spend a disproportionate amount of time honing their ideas and not anticipating the arguments of resistance. Understanding those arguments is particularly important to business officers who are dealing with embedded interest groups.

In launching a new financial management process, for example, a college business officer needs the support of the

central fiscal office; the local fiscal office; and the administrators in each of the units, and their supervisors, even though they will only be tangentially affected. Each group has its own turf, and there will be varying degrees of resistance, and perhaps some of the arguments outlined here will be used to stop or slow down a change effort. CBOs would be wise to familiarize themselves with the arguments of resistance to frame their own case for making change. If the argument is that "it's been done before," stress how this time, implementation will be improved; if "it's too risky," show how the risks have been accounted for in the planning process.

The message of the agenda mover program is clear: Anyone who thinks that he or she can move an agenda forward because the numbers make sense or the crisis is immediate is dealing from a position of sheer optimism.

Negotiate the Buy-in

Universities don't abide lone rangers. This reality calls for building a coalition by convincing other leaders of the merits of a particular change initiative that stands to benefit them. Otherwise, the chances of a successful change initiative are slim.

For example, we observed in one instance, a vice president for facilities who attempted to unilaterally modify the way facilities were managed. The process in place called for a dean or a business officer to make a request of the facilities unit when something was needed at their particular college. The work eventually would be done—or not—with some units taking priority over other units for unknown or unspecified reasons.

When the vice president of facilities suddenly began using a new way of requesting and assigning work, he experienced resistance from the deans who were used to the earlier processes. There was also unexpected resistance from facilities staff, who were not included in the decision to change things and rather taken by surprise by new procedures.

In response, the vice president reshuffled some staff, and then reached out to a single dean and proposed a memorandum of understanding that made the new process much more clear, laying out the services that the dean could expect from facilities, the associated costs of those services, and the framework of a grievance procedure in case problems arose.

By partnering with an academic dean, the vice president managed to gain traction for his change agenda. The agreement created coherence, clarity, and accountability between central facilities and the college units. With the success of the modified facilities management process demonstrated at one school, the leadership duo was able to encourage other deans to sign on to the new model.

We've identified three skills critical to the creation of effective coalitions, whether focusing on a new system, process, or initiative:

The ability to justify the proposed position. "Justification" in colleges and universities is rarely about saving only money. Agenda movers must give groups reasons to agree with their ideas and support their efforts beyond simply saying, "Look at the numbers."

Sometimes this approach includes a moral or emotional appeal, such as, "students, faculty, or the cabinet expect it of us." This justification for change, embedded in collective responsibility, is often ignored, but may prove essential in getting the buy-in.

Recognition that moving a change agenda creates anxiety. In getting to eventual buy-in, agenda movers are aware of the inherent risks that their ideas may hold for others. They take the time to not only identify the areas of risk, but also ways that risk can be mitigated. They try to be as specific and as transparent as possible. Effective agenda movers couch their plans and ideas in the reality of others and are as concrete as possible about the details, never dismissing anxieties and hesitations. As much as possible, the change leader creates a sense of safety. Without this, the buy-in will never be achieved.

The capacity to manage with agility. Agenda movers understand that their primary drive is to get things done. People are in their corner, and they have to manage for execution, which means that they have to pivot to make adjustments. Pivoting doesn't mean flip-flopping, but, instead, reacting to the signals in a measured way. If the timeline was three months, but now it's going to be eight months, agenda movers don't panic. They deal with the stresses and surprises as they come.

It's Still About the Politics

The message of the agenda mover program is clear: Anyone who thinks that he or she can move an agenda forward because the numbers make sense or the crisis is immediate is dealing from a position of sheer optimism. Particularly in higher education institutions, resistance to change is typically a reality and a powerful roadblock. Consequently, leaders who have honed their skills in getting past the roadblocks have a better chance of achieving the change agenda.

This can be a difficult concept to grasp. In fact, our trainings with university leaders typically are met with a sense of hesitation when we make it clear that the core of our concern is about political competence—the ability to affect policy in an environment where individuals have varying opinions or priorities. The agenda mover perspective recognizes that universities are loosely coupled systems, layered with turf, networks, status games, and scarce resources.

Against this backdrop, successful change agendas depend on the capacity of the agenda mover to develop political competence. In an organizational context, this means that a good idea is only the start.

Reflecting on what he learned in the agenda mover program, Hossein Haj-Hariri, who participated in the program at University of Virginia, and is now dean in the college of Engineering and Computing at the University of South Carolina, Columbia, notes: "I have been working with the provost on a few major initiatives that have been pain points for the university for many years. In every one of these circumstances, I constantly use what I learned in the agenda movers workshop: the importance of understanding the agendas of others, and the ability to form coalitions that implement meaningful solutions. It's a pragmatic process, and the skills learned easily transcend the world of academia."

Chris Halladay, associate vice president for human resources at Lehigh University, observes, "The leadership course has brought Lehigh's highest potential leaders to a new level of performance, giving them the skills to initiate ideas, overcome resistance, mobilize support, negotiate the buy-in, and work with others to move agendas. More than this, it has given them practical self-confidence by using those skills to move a campus-changing agenda. This demonstrated capacity to work together in tackling the toughest, yet most relevant, issues for Lehigh University has greatly enhanced the confidence in our next generation of leaders."

SAMUEL B. BACHARACH is the McKelvey-Grant Professor, Department of Organizational Behavior, Cornell University, Ithaca, N.Y., and co-founder of Bacharach Leadership Group. His latest book is *The Agenda Mover: When Your Good Idea Is Not Enough* (Cornell University Press, 2016).
sb@blg-lead.com

ADVERTISER INDEX

American Campus Communities 2
12700 Hill Country Blvd.
Suite T-200
Austin, TX 78738
PH 512.732.1000
www.americancampus.com

Axiom EPM, a Kaufman Hall Co. 24
10260 SW Greenburg Rd. #710
Portland, OR 97223
PH 877.691.9669
FX 503.961.1176
info@axiomepm.com
www.axiomepm.com
Ruth O'Hare
Business Development Manager

BankMobile 4
115 Munson St.
New Haven, CT 06511
PH 203.776.7776
aapuzzo@bankmobile.com
www.bankmobiledisbursements.com
Amy Apuzzo
Director, Campus Marketing

Barnes & Noble College ..... Cover 4
120 Mountain View Blvd.
Basking Ridge, NJ 07920
PH 908.991.2627
FX 908.991.2846
jvj@bncollege.com
www.bkstore.com

indiCo ..... Cover 2
500 East Lorain St.
Oberlin, OH 44074
PH 800.622.7498
www.goindico.com

Nelnet Campus Commerce ..... Cover 3
121 S. 13th St., Suite 301
Lincoln, NE 68508
PH 888.867.7018
www.CampusCommerce.com

TouchNet 10, 11
15520 College Blvd.
Lenexa, KS 66219
PH 913.599.6699
FX 913.599.5588
info@touchnet.com

United Educators 6
7700 Wisconsin Ave., Suite 500
Bethesda, MD 20814
PH 301.907.4908
FX 301.907.4830
risk@ue.org
www.ue.org