



**The REACH Program of
Trinity International University**

**BUS 351R:
Organizational Change &
Development**

Student's Manual 1.0

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I. Course Description

This course exposes students to the theory and practice of organizational change with a particular emphasis on gaining the skills that are necessary to facilitate organizational change. *Three hours.*

II. Course Overview

To survive, organizations must change. Organizations changes in many ways, and they change for many reasons. But one thing is sure: organizations that fail to change will eventually find themselves obsolete in today's market. From churches to local restaurants to multi-national corporations, successful organizations maintain a close watch on their environment to understand the needs of their primary markets and to know what they must do to adapt to meet those needs effectively.

The study of organizational change and development encompasses many disciplines. From management to marketing to management information systems, change touches all aspects of how businesses move through time in an attempt both to survive and to thrive. However, while there are methods and theories for how to accomplish change in organizational settings, there is no one solution that meets all challenges.

This course describes the nature of organizational change and development, the factors that work for and against change, and the processes needed for constructive change. It explores various methods that provide options to meet the challenges of real-world situations. It uses case studies from organizations to demonstrate the relevance of course material as well as show the process of change in action.

III. Course Materials

1. Required

- a. Kotter, J. & Cohen, D. (2002). *The heart of change: Real-life stories of how people change their organizations*. Boston, MA: Harvard Business School Press. ISBN: 978-1-57851-254-6
- b. Palmer, I., Dunford, R., & Akin, G. (2009). *Managing organizational change: A multiple perspectives approach* (2nd ed.). Boston, MA: McGraw-Hill Irwin. ISBN: 978-0-07-340499-8

IV. Course Policies

1. APA Documentation

All written work (e.g. worksheets/essay questions, reflection papers, final projects, etc.) in the REACH Program must conform to the APA parenthetical notation style (please consult *A Pocket Style Manual* listed above). This includes:

- an APA title page (including a running header and page number)
- an "Abstract" page with a 1-2 paragraph summary of your paper (an abstract is only necessary for your Applied Learning Papers, but not for your smaller assignments)
- In-text citations (with author(s), date, and page number (if applicable))

Note Well: Even discussion board postings and PowerPoint presentations, for example, must use in-text citations when you cite another person's work or ideas.

- a "References" page (it is not called a "bibliography")
- one inch margins
- 12 point font
- double spaced

Failure to use and cite others' work or ideas properly will lead to charges of academic dishonesty. See below for more information.

2. Academic Integrity

As a member of the Trinity community, we ask you to hold yourself and others to the highest standards of academic integrity and honesty. Violations take many forms, which include, but are not limited to, the following:

- Plagiarism: using another's work or ideas without proper documentation, which requires citing the author or authors' name(s), date of publication, and page number (if applicable)
- Cheating: using notes, books, or crib sheets during closed-book quizzes or exams, or copying from another's student's work
- Submitting Previous Work: submitting your work that was previously turned in for credit
- Ghosting: writing a paper or taking a quiz (or any other evaluation) in place of another student
- Aiding and Abetting: helping others to commit acts of academic dishonesty, or failing to report those who have or plan to commit dishonest acts

Faculty members will investigate all violations of academic integrity, whether deliberate or non-deliberate. If a violation is confirmed, the student may receive an "F" for the assignment and the course. In such a case, the student may not drop the course. The faculty member will document the case of dishonesty, explaining the incident and the action taken. The Associate Dean of Nontraditional Education will receive a copy of this report, and a copy will be placed in the student's file. In serious cases of academic dishonesty, the Associate Dean may choose to meet with the student and faculty member to review the case. Multiple violations may lead to a student's dismissal from the program.

3. Late Work

All assignments must be turned in on or before the date they are due. Any assignment turned in late will be deducted as follows:

- a. 10% off for up to one day late
- b. 20% off for up to two days late
- c. assignments more than two days late will receive a zero

An extension on the time needed to submit final course requirements (such as the ALP) will be granted only in unusual circumstances and if the instructor and the Associate Dean grant the request.

4. Attendance Policy

Because of the accelerated and collaborative nature of the REACH courses, students are required to attend every class session. Missing a single class means a significant portion of contact with the instructor and the learning community has been lost.

For face-to-face courses, students missing one class session will be penalized between one-half and one full letter grade. Students missing two class sessions will receive an “F” for the course. Any student missing more than 30 minutes of a course session will be considered absent for the full course session.

For online courses, students must participate actively in class discussions and activities. Failure to do so will result in a grade reduction of one-half to a full letter grade at the discretion of the instructor.

5. Basic Writing and Speaking Proficiency

The REACH Program expects you to maintain basic standards of writing and speaking proficiency. If you believe you need support in one or both areas, please contact your academic advisor and/or use the resources in the following section.

V. Course Outcomes

“At the end of this course, the students will be able to...”

1. Implement Kotter’s eight steps of organizational change in real world scenarios.
2. Define ‘Change’ as a process and a theory in the lives of people and the business world.
3. Outline the environmental and internal pressures that move organizations towards change.
4. Describe the effects of common change factors that work on modern businesses such as downsizing, introducing new technologies, mergers, acquisitions, and hostile takeovers.
5. Recognize the signs and reasons that an individual or an organization is resistant to constructive change.
6. Discuss the process for developing a vision for an organization.
7. Define the role of change managers and the leadership skills necessary to bring accomplish change.

VI. Course Requirements

1. Worksheets – 50 points x 5 worksheets = 250 points
2. Applied Learning Paper = 100 points
3. Group Project Presentation = 50 points
4. Participation = 50 points

Total Points = 450 points

VII. Grading Scale

Your final course grade will be based on the total number of points that you earn throughout the course:

Percentage	Grade
92-100	A
90-91	A-
88-89	B+
82-87	B
80-81	B-
78-79	C+
72-77	C
70-71	C-
68-69	D+
62-67	D
60-61	D-
0-59	F

VIII. Course Schedule

Session One Overview

Outcomes for Session One

“At the end of this session, the students will be able to...”

1. Define ‘Change’ as a process and a theory in the lives of people and the business world.
2. Analyze models of change theory and describe their practical usefulness and limitations.
3. Describe Palmer, Dunford, & Akin’s six images of managing change and how they are used by change officers.
4. Outline the environmental and internal pressures that move organizations towards change.
5. Critique the forces that add to or subtract from the stability of an organization during the change process.
6. Implement Kotter’s eight steps of organizational change in real world scenarios.

Assignments Due for Session One

1. Read Palmer, Dunford, & Akin Chapters 1-3
2. Read Kotter – Introduction and Step 1
3. Complete Worksheet #1

Session Two Overview

Outcomes for Session Two

“At the end of this session, the students will be able to...”

1. Define first-order and second-order change and the differences between the two categories.
2. Describe the effects of common change factors that work on modern businesses such as downsizing, introducing new technologies, mergers, acquisitions, and hostile takeovers.
3. Utilize diagnostic tools and instruments to manage effectively the change process and assess its success.
4. Recognize the signs and reasons that an individual or an organization is resistant to change.
5. Discuss the approaches to manage resistance to change.
6. Implement Kotter’s eight steps of organizational change in real world scenarios.

Assignments Due for Session Two

1. Read Palmer, Dunford, & Akin Chapters 4-6
2. Read Kotter – Step 2 and Step 3
3. Download, print, and read your assigned case from HarvardBusiness.org
4. Complete Worksheet #2

Session Three Overview

Outcomes for Session Three

“At the end of this session, the students will be able to...”

1. Understand and explain the Organizational Development approach.
2. Define *Appreciate Inquiry*, *Positive Organizational Scholarship*, and the *Sense-Making Approach to Change* as well as describe their practical implications to real world change scenarios.
3. Critique the strengths and weaknesses of various approaches to managing a healthy change environment in organizations.
4. Describe the *Change Management*, *Contingency*, and *Processual* approaches to change.
5. Differentiate between Organizational Development and Change Management theory.
6. Implement Kotter’s eight steps of organizational change in real world scenarios.

Assignments Due for Session Three

1. Read Palmer, Dunford, & Akin 7-8
2. Read Kotter – Step 4 and Step 5
3. Complete Worksheet #3

Session Four Overview

Outcomes for Session Four

“At the end of this session, the students will be able to...”

1. Identify and apply the principles of effective visions for organizations.
2. Recognize the role of a vision in the process of organizational change.
3. Critique vision statements, recognizing meaningful content, and effective management of organizations.
4. Recognize communication as a key component of any change strategy.
5. Utilize business skills and tools to become an agent of change.
6. Implement Kotter’s eight steps of organizational change in real world scenarios.

Assignments Due for Session Four

1. Read Palmer, Dunford, & Akin 9-10
2. Read Kotter – Step 6 and Step 7
3. Complete Worksheet #4

Session Five Overview

Outcomes for Session Five

“At the end of this session, the students will be able to...”

1. Define the role of change managers and the leadership skills necessary to bring healthy change.
2. Describe the role of toxic handlers and their importance within the change environment.
3. Critique different change scripts for relevance and make corrections where necessary.
4. Identify strategies and skills to communicate the process of change to stakeholders.
5. Implement Kotter’s eight steps of organizational change in real world scenarios.

Assignments Due for Session Five

1. Read Palmer, Dunford, & Akin 11-12
2. Read Kotter – Step 8 and Conclusion
3. Complete Worksheet #5

Session Six Overview

Outcomes for Session Six

“At the end of this session, the students will be able to...”

1. Implement Kotter’s eight steps of organizational change in real world scenarios
2. Demonstrate an understanding of change management in theory and practice.
3. Apply organizational development and change management leadership strategies to real world scenarios.
4. Critique change plans for completeness and overall health.

Assignments Due for Session Six

1. Complete the Applied Learning Paper Group Project
2. Prepare to Deliver Your Group Presentation

IX. Course Documents

Session One Documents

Worksheet #1

When completing this worksheet, your total word count should be a minimum of 1500 words and a maximum of 2100 words (5-7 pages, double spaced).

After reading Palmer, Dunford, & Akin Chapter 1, complete the following:

- Write a brief account of a significant change you have experienced in your personal or professional life. From Table 1.1, what “lessons” were present in your story? Which ones were absent in your story? What are the implications?

After reading Palmer, Dunford, & Akin Chapter 2, complete the following:

- Exercise 2.1 (working as an individual)
- Table 2.5
- Case Study – Green Mountain Resort (Dis)solves the Turnover Problem
Questions 1-4

After reading Palmer, Dunford, & Akin Chapter 3, complete the following:

- Table 3.13
- Case Study – Chipping Away at Intel, All Questions for both Part 1 and Part 2

Session Two Documents

Worksheet #2

When completing this worksheet, your total word count should be a minimum of 1500 words and a maximum of 2100 words (5-7 pages, double spaced).

After reading Palmer, Dunford, & Akin Chapter 4, complete the following:

- Exercise 4.1
- Exercise 4.2
- Table 4.13
- Case Study – Nestle, Questions 1-4

After reading Palmer, Dunford & Akin Chapter 5, complete the following:

- Using your ALP Case Study, answer Table 5.6
- Table 5.17
- Case Study - Boeing, Questions 1 and 2

After reading Palmer, Dunford, & Akin Chapter 6, complete the following:

- Exercise 6.5 – Ajax Minerals
- Table 6.16
- Case Study - Problems at Perrier, All Questions

Session Three Documents

Worksheet #3

When completing this worksheet, your total word count should be a minimum of 1500 words and a maximum of 2100 words (5-7 pages, double spaced).

After reading Palmer, Dunford, & Akin Chapter 7, complete the following:

- Exercise 7.2 – Use your case studies for the ALP as the “current issue”
- Table 7.9
- Case Study – Change at DuPont, Questions 1-3

After reading Palmer, Dunford & Akin Chapter 8, complete the following:

- Table 8.3
- Case Study – The British Airways Swipe Card Debacle, All Questions

Session Four Documents

Worksheet #4

When completing this worksheet, your total word count should be a minimum of 1500 words and a maximum of 2100 words (5-7 pages, double spaced).

After reading Palmer, Dunford & Akin Chapter 9, complete the following:

- Exercise 9.5 – Choose two statements and write 2-4 paragraphs stating your personal views on them. Use examples from your own experience to establish your views
- Table 9.14
- Case Study – Role of Vision at Mentor Graphics, All Questions

After reading Palmer, Dunford & Akin Chapter 10, complete the following:

- Exercise 10.2 – Be sure to start this exercise early since it requires observation of a group interaction. The group observed can be at a for-profit or nonprofit organization.
- Table 10.13
- Case Study – Cheryl Ways and Agilent Technology's Layoffs, All Questions

Session Five Documents

Worksheet #5

When completing this worksheet, your total word count should be a minimum of 1500 words and a maximum of 2100 words (5-7 pages, double spaced).

After reading Palmer, Dunford & Akin Chapter 11, complete the following:

- Exercise 11.1
- Exercise 11.2
- Table 11.14
- Case Study – Tyco, Questions 1-4

After reading Palmer, Dunford & Akin Chapter 12, complete the following:

- Exercise 12.1 – Name eight measures that apply to the assigned case study you will be using for your ALP, and then complete the exercise
- Table 12.15
- Case Study – The Challenger and Columbia Shuttle Disasters, All Questions

Applied Learning Paper – Harvard Business Case Study

Your instructor will divide the class into small groups (2 or 3 people) to work on the major project. The subject of the project will be an assigned case study from the course instructor that deals with the subject of organizational change (see below).

Each group will be responsible for (1) completing a major paper that analyzes the case of 16-30 pages – depending on the size of the group) and (2) presenting the findings to the class during Session #6.

The group presentations are to be no longer than 40 minutes and no shorter than 25 minutes. After every presentation, there will be 5 minutes for questions and answers. Each student will write 8-10 pages on the assigned case for the group paper. The group will hand in a unified project, which includes a title page, table of contents, and references page. Each group member will receive the same grade for the written project and the oral presentation, so it is critical that each group member critique and refine one another's work prior to submission.

Note Well: The group presentation will be based on one of the following case which must be purchased individually by each student and brought to sessions 2 through 6. **Do not purchase an article until after you have come to session 1, as your instructor will select a case for you.** Each article costs \$6.95 and can be found at <http://harvardbusiness.org/> by entering the product number or case study name into the “search All Products” area located towards the top of the webpage.

- a. Casciaro, T., et al. (2005). Leading change at simmons (A). Harvard Business Review. Retrieved from: <http://harvardbusiness.org/search/406046/0> – product #406046
- b. Chu, M., Larson, B. (2006). JA worldwide: Managing change in multi-governed environment. Harvard Business Review. Retrieved from: <http://harvardbusiness.org/search/306025/> – product #306025
- c. Naravandas, D. (2007) Ericsson: Leading in times of change. Harvard Business Review. Retrieved from: <http://harvardbusiness.org/search/9-507-074/0> - product #9-507-074
- d. Gilbert, C., & Sarkar, R. (2005). Merck: Conflict and change. Harvard Business Review. Retrieved from: <http://harvardbusiness.org/search/9-805-079/0> – product #9-805-079
- e. Konrad, A., & Mitchell, J. (2005). Christina Gold leading change at Western Union. Harvard Business Review. Retrieved from: <http://harvardbusiness.org/search/906M07/0> – product # 906M07
- f. Rivkin, J., et al. (2005) Change at Whirlpool Corp. (A). Harvard Business Review. Retrieved from: <http://harvardbusiness.org/search/9-705-462/0> – product #9-705-462
- g. Shaw, K., & Coates, B. (2007). Cinopolis: Changes to a family owned company. Harvard Business Review. Retrieved from: <http://harvardbusiness.org/search/E278-PDF-ENG/0> – product # E278-PDF-ENG

Note Well: There is no prescribed organizational structure for this paper. However, the chapter titles from Palmer, Dunford, and Akin provide a useful overview of many of the questions/topics you will address. Your paper should be filled with citations to the course materials, as well as to outside research (such as Jim Collins' work *Good to Great*).

Both in your paper and your presentation, include a brief section that describes the case in question. Also, you may want to include a section that addresses the organizational change from an ethical/Christian perspective. With that in mind, a suggested structure for your paper could look like this:

- I. Introduction
- II. Summary of Case
- III. Section #1
- IV. Section #2
- V. Etc.
- VI.
- VII. Ethical Considerations
- VIII. Summary Insights and Recommendations
- IX. Conclusion

Criteria for Evaluation

Your instructor will clarify the assignment and evaluate your work using the documents "Instructor Evaluation for Written Work" and "Instructor Evaluation for Oral Presentations."

X. Evaluation Forms

Instructor Evaluation for Written Work

Student's Name	Course Number BUS 351	Assignment ALP Group/Individual
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Specific Requirements	Percentage Distribution Determined by Instructor	Percentage Earned by Student	Instructor Comments			
Organization <ul style="list-style-type: none"> ▪ Introduction¹ and Conclusion² ▪ Section Titles³ ▪ Section Introductions and Conclusions⁴ ▪ Organizing Words, Phrases, and Sentences 	10	<input type="text"/>	▪			
Research / Sources (pp. 91-102⁵) <ul style="list-style-type: none"> ▪ Credibility (academic vs. non-academic) ▪ Number of Supporting Viewpoints ▪ Number of Opposing Viewpoints ▪ Primary Research 	20	<input type="text"/>	▪			
Discipline-Specific Knowledge/Content <ul style="list-style-type: none"> ▪ Explanation (restate, define, describe, illustrate) ▪ Analysis (reasons, causes, effects, purposes)⁶ ▪ Critique (agree, disagree, strengths, weaknesses) ▪ Synthesis of Existing Ideas and/or Theories 	20	<input type="text"/>	▪			
Discipline-Specific Application <ul style="list-style-type: none"> ▪ Contextualization (individual, group, organization, sub-culture, culture, etc.) ▪ Recommendations (stop, start, continue, modify) ▪ Creation of New Ideas and/or Theories 	30	<input type="text"/>	▪			
Christian Worldview (and Other Worldviews) <ul style="list-style-type: none"> ▪ Use of Scripture (interpretation and application) ▪ View of Scripture ▪ View of God, gods, or Ultimate Reality ▪ View of Humanity ▪ View of Birth, Life, Redemption, & Death ▪ View of Creation/Origin, History, the Present, & the End Times ▪ View of Knowledge ▪ View of Ethics 	10	<input type="text"/>	▪			
Documentation (pp. 155-195) <ul style="list-style-type: none"> ▪ APA Paper Format ▪ APA Title Page (with Header) & Abstract ▪ APA Integration of Sources⁷ ▪ APA "References" Page 	5	<input type="text"/>	▪			
Composition (pp. 1-90) <ul style="list-style-type: none"> ▪ Clarity and Concision ▪ Grammar, Punctuation, and Mechanics ▪ Voice (Academic vs. Non-academic) ▪ Tone (Assertive vs. Passive or Aggressive) 	5	<input type="text"/>	▪			
	Total Possible	Total Percentage Earned by Student	Total Possible Points for Assignment	=	Total Points Earned	Final Grade for Assignment
	100%	<input type="text"/>	x	=	<input type="text"/>	<input type="text"/>

Explanatory Notes

An effective introduction: (1) grabs attention through a quote(s), statement(s), statistic(s), question(s), and/or story, (2) states the thesis or claim (which needs to be clear, concise, arguable, & controversial(?)), and (3) previews/outlines the paper.

² An effective conclusion: (1) summarizes the paper and ties its main points together and (2) ends with final thought(s), question(s), quotation(s), warning(s), challenge(s), and/or action points.

³ Section titles are often as follows: Title of the Paper (not the word “Introduction”), Background or Organizational Context or..., (Main Sections of the Paper), and Conclusion.

⁴ Section introductions and conclusions are usually not necessary in shorter papers (e.g., 1-2 pages).

⁵ All page references refer to Hacker, D. (2008). *A pocket style manual* (5th ed.). Boston: Bedford/St. Martin's.

⁶ Other categories for analysis include: assumptions, problems, solutions, and predictions.

⁷ There are three strategies for integrating sources into a paper: quotation, paraphrase, and summary.

Instructor Evaluation for Oral Presentations

Student's Name	Course Number BUS 351	Assignment ALP Group/Individual
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Specific Requirements	Percentage Distribution Determined by Instructor	Percentage Earned by Student	Instructor Comments			
Non-verbal Communication <ul style="list-style-type: none"> ▪ Attire (professional) ▪ Eye Contact (consistent) and Facial Expressions ▪ Posture (straight) ▪ Gestures and Movement (appropriate) 	10		▪			
Verbal Communication <ul style="list-style-type: none"> ▪ Volume and Pitch ▪ Pacing and Pauses ▪ Clarity and Concision ▪ Enthusiasm and Passion 	10		▪			
Organization <ul style="list-style-type: none"> ▪ Introduction⁸ and Conclusion⁹ ▪ Section Titles¹⁰ ▪ Section Introductions and Conclusions¹¹ ▪ Organizing Words, Phrases, and Sentence 	10		▪			
Discipline-Specific Knowledge/Content <ul style="list-style-type: none"> ▪ Explanation (restate, define, describe, illustrate) ▪ Analysis (reasons, causes, effects, purposes)¹² ▪ Critique (agree, disagree, strengths, weaknesses) ▪ Synthesis of Existing Ideas and/or Theories 	25		▪			
Discipline-Specific Application <ul style="list-style-type: none"> ▪ Contextualization (individual, group, organization, sub-culture, culture, etc.) ▪ Recommendations (stop, start, continue, modify) ▪ Creation of New Ideas and/or Theories 	25		▪			
Christian Worldview (and Other Worldviews) <ul style="list-style-type: none"> ▪ Use of Scripture (interpretation and application) ▪ View of Scripture ▪ View of God, gods, or Ultimate Reality ▪ View of Humanity ▪ View of Birth, Life, Redemption, & Death ▪ View of Creation/Origin, History, the Present, & the End Times ▪ View of Knowledge ▪ View of Ethics 	10		▪			
Misc. <ul style="list-style-type: none"> ▪ Research (credibility, number, supporting & opposing viewpoints) ▪ Visual Aids¹³ (if used) ▪ Response to Audience Comments/Questions ▪ Time Limit 	10		▪			
	Total Possible	Total Percentage Earned by Student	Total Possible Points for Assignment	=	Total Points Earned	Final Grade for Assignment
	100%		x	=		

Explanatory Notes

An effective introduction: (1) grabs attention through a quote(s), statement(s), statistic(s), question(s), and/or story, (2) states the thesis or claim (which needs to be clear, concise, arguable, & controversial(?)), and (3) previews/outlines the paper.

² An effective conclusion: (1) summarizes the paper and ties its main points together and (2) ends with final thought(s), question(s), quotation(s), and warning, challenge, and/or action points.

³ Section titles are often as follows: Title of the Paper (not the word “Introduction”), Background or Organizational Context or..., (Main Sections of the Paper), and Conclusion.

⁴ Section introductions and conclusions are usually not necessary in shorter papers (e.g., 1-2 pages).

⁵ Other categories for analysis include: assumptions, problems, solutions, and predictions.

⁶ Visual aids should only be used if they make a distinct contribution to the presentation; otherwise, they should be avoided. Examples include: PowerPoint, handouts, whiteboards or flipcharts, audio or video, etc.

1. Turn in all assignments to your instructor.