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**QUINLAN**  
SCHOOL of BUSINESS

## **MGMT 472 – ORGANIZATIONAL CHANGE AND DEVELOPMENT**

Spring Term – Wednesday 6:00–9:00 p.m.

Corboy Law Center – Room 322

### **MGMT 472 | Organizational Change and Development**

This course focuses on the manager's role as a change agent in implementing effective change management and organizational development.

**Learning Outcome:** Students will apply change theory frameworks in analyzing different types of organizational change such as mergers and restructuring and will learn how to manage resistance to change, facilitate change implementation, and foster long-term acceptance of change by employees.

➤ **Special Note:** MGMT 472 is cross-listed with HRIR 430.

### **Course Overview**

This course seeks to enhance the manager's effectiveness as a change agent through learning about the organizational change framework, strategic change and its relationship to organization development, and outcomes of organizational change.

The course integrates strategic issues with "people" issues in studying effective change management in a diverse global environment. Extensive experiential material and an outside field study group project of a corporate sustainability initiative are used to illustrate change intervention strategies in individual, group, and organizational situations.

### **Course Objectives and Learning Outcomes**

1. Recognize fundamental principles, generalizations, and theories of change that underlie current business environments.
2. Understand the complexity of the change process and recognize the challenges of change, both as a participant in the process as well as a creator of change (the managerial change agent).
3. Engage in a strategic approach to organizational change that explicitly incorporates managing the "people issues of change."
4. Apply data collection methods to an organizational change situation (i.e. a sustainability initiative) and learn how to evaluate, synthesize, and present the data results effectively.

## **Required Material:**

Anderson, Donald L. *Organization Development*, 4<sup>th</sup> ed. Sage Publications, 2017, ISBN 978-1-5063-1657-4. Available at Amazon.com

*HBR's 10 Must Reads on Change Management*, Harvard Business Press (2011), ISBN 978-1-4221-5800-5. **Included in HBR pack**

MGMT 472 Packet of Cases and Readings (HBR pack on Harvard Business School Site):

<https://hbsp.harvard.edu/import/605418>

Note: Change Management Simulation: Power and Influence V2 in **HBR pack** is mandatory

**Other class materials will be available on Sakai (exercises, PowerPoint slides, etc.)**

## **Optional Additional Readings:**

Anderson & Ackerman Anderson, *Beyond Change Management*. 2<sup>nd</sup> ed. Pfeiffer (2001) ISBN: 978-0-470-89113-1

Heath, Chip & Heath, Dan. *Switch*. Crown Business, 2010.

## **Sakai and Other Student Learning Resources**

**Sakai** is a learning management system that is a repository for course information, including the syllabus, class notes (posted the day of the class), assignments, additional readings, and other materials needed to successfully complete MGMT 472. Furthermore, Sakai is used for communications both to and from the instructor and is the place to submit assignments, view your grades, and receive feedback. Consequently, it is important to understand how to use Sakai and to check it frequently.

Information for using Sakai effectively is available through Loyola's Instructional Technology (IT) and Research Support. Sakai information for students can be found at

<http://www.luc.edu/itrs/teachingwithtechnology/sakai/sakai-student-tutorials.shtml>.

Since I am not a Sakai expert, questions concerning its use should be directed to the IT Help Desk.

Upon accessing Sakai, you will find that each class has a tab labeled Session 1, Session 2, Session 3, etc. Within each tab you will find information associated with the upcoming class, including articles to read, assignments to complete, or activities or ideas to consider before class. The PowerPoint notes for the class will be posted the day of the class. *Hard copies of these notes and other handouts will be distributed in class.*

**Questions about course content and assignments** should be addressed in class or sent to my email. I will respond to questions within 24 hours. You can also make an office appointment. Please note that I use your "luc" email to communicate directly with students and **not** personal email, such as gmail, yahoo, etc.

**Writing Center:** If writing is a challenge for you (it is for me as a non-native speaker), Loyola has a Writing Center that can help you with papers and team reports, especially if English is a second language. Information about the Writing Center can be found at <http://www.luc.edu/writing/>

## **Course Requirements and Grading Criteria**

Grading criteria consist of your individual performance and participation in group assignments.

### **1. Getting to Know You Questionnaire**

You are asked to complete a short questionnaire prior to the first evening of the class. The purpose is to guide the course discussions based on your goals, background, and experiences. It is a requirement of the course and is worth 5 credit points.

### **2. Group Case Analyses**

You will be a member of the same group throughout this class. Your group will select one case study from the HRB pack and perform an in-depth analysis of the presented issues. Assume that you are reporting to the top management of the company facing the social and/or ethical challenges. Use a problem-solving memo format to write up your responses.

You will submit a written group paper of 5-7 pages (double space) following the Evaluation Sheet for Case Write-ups. You will also prepare a class presentation for up to 30 min. Your presentation should be informative, thought-provoking and interactive. You are expected to engage your classmates in a lively discussion about your topic and be prepared to answer their questions.

**CITE! CITE!** You do not need to use outside sources to complete the case analyses. In analyzing the cases, you can rely on the text, assigned readings, class notes, and the text of the assigned cases. If you quote or merely restate materials from the readings or cases, then you should cite the material and include a bibliography. If you do not do this, I will not accept the case.

### **3. Mid-term Exam**

A short, closed-book exam will take place in class. It will include both multiple choice and objective, brief essay questions.

### **4. Group Final Project: Field study of a strategic change, preferably involving a corporate sustainability initiative**

This project is designed to allow your group to analyze a change situation involving sustainability, using the organizational change concepts and frameworks we will be using in class. The in-class presentations will also illustrate the variety of organizational development (OD) interventions being used by organizations to implement change initiatives. In addition, the project will let you apply the research and data collection methods we will be studying.

Select a specific change (i.e. sustainability) initiative that has already occurred (or is well in process) within an organization. This project is to be an analysis (not merely a description) of this change intervention, which can be at the organizational, group, and/or individual level. Think of this project as similar to a consultant's work for a client; thus, include conclusions and recommendations in your report.

Your research must be a field study, collecting data beyond your own interpretation of events: data from observations, interviews and/or surveys about a particular change initiative. You may develop your own data collection questions or adapt questions used by others. There are many commercial services available (e.g., Survey Monkey) that provide help with developing surveys and collecting responses. Please check the details, as these services range in cost from free to fairly expensive.

**One-page outline (from each group) is due by Week 3.** Briefly describe what change intervention/sustainability initiative you are planning to study, and at what organization. What type of change technique is this? Identify three or four key change issues you plan to address. What are your plans for data collection: i.e., observations? company records? interviews? surveys? This non-graded assignment allows me to provide you with early feedback on your chosen project topic.

Your project will consist of two parts:

(1) a **presentation** to the class (40% of the project grade) and  
(2) a **written executive summary paper** (60%). Your group will receive one overall grade, based on separate evaluations for the presentation and the paper. **All** members of a group will receive the **same** grade unless the peer evaluations reveal necessary adjustments to an individual's grade. Project groups may consist of 3 to 5 members. If you are having problems forming a group, please come to me for help ASAP.

Your group will give a 20-minute **presentation** of your project to the class on May 1st. Your presentation should include a **SUMMARY of the ACTUAL DATA you collected (bar charts, tables, graphs, etc.)** as well as your analysis, conclusions, and action plan recommendations. **Each group member** must participate in this presentation.

**Grading criteria for the class presentation** include:

- organization and creativity
- presentation of data collected
- force field analysis
- analysis of change issues, including consideration of the *industry's* sustainability progress as well as the organization you are studying
- use of class concepts to support analysis
- own conclusions and action plan recommendations
- contribution by all group members and use of time

**\*\*\* On your presentation date, please also provide me with a copy of any handouts or PowerPoint slides you will be using. \*\*\***

Your group's **written executive summary paper** should be a typed, double-spaced, professionally prepared paper. The written summary is due at the beginning of class on the date your group's presentation is scheduled. **NO LATE PAPERS WILL BE ACCEPTED**. This executive **summary** paper should be 3 - 5 pages of text (5 pages maximum), plus 1 - 3 pages of data exhibits (total paper maximum of 8 pages). **Please also include your references, on a separate page if necessary.**

## **Grading criteria for the written executive summary include:**

- clarity of writing and review of data
- summary analysis of change management/sustainability issues
- conclusions and recommendations.

Please address the questions listed below in preparing your project. Make sure that you demonstrate your ability to use the assigned readings plus our class discussions in your analysis.

1. Briefly describe this organizational change/sustainability initiative. What was the organization trying to accomplish? Was there a vision for the change?
2. How well was the change situation diagnosed by the organization before a particular initiative was implemented? Were forces for and against change assessed? Prepare a force field analysis for this situation. Be sure to consider the company's industry as it pertains to sustainability (e.g., an oil company vs. a software company).
3. Explicitly consider the implementation of the sustainability initiative. Who were the change agents? Why were they effective (or ineffective) in managing counterforces to change? What change leadership issues were involved?
- \*4. How successful was the change effort with respect to its sustainability objectives? How do you know? Was the organization able to institutionalize this change? Why or why not? How did the organization evaluate the effectiveness of this change?
- \*5. Overall, what conclusions can you reach as to why this change effort/sustainability initiative succeeded or failed? Develop an action plan for going forward: What recommendations could you make to the organization about how to be more effective "next time" when implementing change? Can you offer any innovative suggestions?
6. What data collection method(s) did you select to study this intervention? Why did you consider it appropriate? How did you implement it? **Note:** Taking photos on-site may require the firm's permission.

\*If you are analyzing an ongoing sustainability initiative that has not yet been completed, answer questions 4 and 5 by predicting what you anticipate will happen.

### **5. Evaluation of Team Contributions**

Team members will evaluate each other's participation and performance at the end of class by completing a peer evaluation form. Evaluation criteria will include each team member's contribution to the small group and to the overall classroom learning climate.

### **Earn Bonus Points**

You can earn 3 bonus points by attending one of the selected events that are sponsored by either Loyola's Institute of Human Resources and Employment Relations or the Human Resource Student Association (HRSA) during the term or semester. To earn points students are required to write a one-page paper identifying what they learned at the event. This paper can be handed in during class or emailed to me at any time throughout the spring term. Events that qualify for bonus points will be

posted on Sakai. Note that bonus points are only awarded for attending one event during the term and you cannot use a single event to qualify for bonus points for more than one class during the term.

The opportunity to earn bonus points is provided to encourage you:

- To enrich your human resource and employment relations knowledge
- To develop your professional network of students, alumni, and other HRER professionals in the Chicago-land area.
- To involve you in important discussions taking place in the HRER field.

### Evaluation

Getting to know you Questionnaire: 5 pts

Mid-term exam: 10 points

Case study presentation 15 pts

Group case study written analysis 10 pts

Final project presentation: 15 pts

Final project executive summary: 20 pts

Peer evaluation: 5 pts

Classroom attendance: 10 pts (10 sessions @ 1 pt/session)

Class participation: 10 pts (10 sessions @ 1 pt/session)

**TOTAL: 100 pts (100%)**

#### Course Grading Scale

A	100-93
A-	92-90
B+	89-87
B	86-83
B-	82-80
C+	79-77
C	76-73
C-	72-70
D+	69-67
D	66-60
F	59 and below

#### Loyola University Grading Scale and Weights

A	4.00
A-	3.67
B+	3.33
B	3.00
B-	2.67
C+	2.33
C	2.00
C-	1.67
D+	1.33
D	1.00
F	0

### Class Expectations

You should treat your classroom obligations as you would treat any serious professional engagement.

This includes:

- Preparing for class by completing all reading assignments and exercises.
- Arriving on time, returning promptly from breaks, and remaining until the end of class.
- Meeting your team commitment.
- **To create a positive learning environment and not disrupt others, you are required to turn off all electronic devices (e.g., phones & computers, etc.) and put them away during class.**

- Participating in classroom activities and discussions.
- Adhering to deadlines and timetables specified in the syllabus.

You should view your participation in the course as being part of a learning community. As such, each of you has a responsibility to make this course a successful learning experience for all members of the class. Most people have a wealth of work experience and so your contribution in class is important. This includes sharing helpful material in class and fulfilling your obligation as a responsible team member.

## **Quinlan School of Business Policies:**

### **Attendance**

Class attendance and participation are fundamental components of learning, so punctual attendance at all classes for the full class meeting period is expected of Quinlan students. Faculty may set participation policies unique to their courses and use class participation as a component of the final grade. The student is responsible for any assignments or requirements missed during an absence.

Because MGMT 472 uses in-class group exercises as well as individual participation, a student *cannot* earn an A for the course without contributing to the class as both an engaged individual student and an involved team member. If you must miss a class or leave early, **please notify me in advance**. You are responsible for any assignments or requirements missed during an absence. Unexcused absences will not be tolerated and will result in lost points.

### **Make-up Examinations**

Loyola University academic policy provides that tests or examinations may be given during the semester or summer sessions as often as deemed advisable by the instructor. Because Quinlan faculty believe examinations represent a critical component of student learning, required examinations should be taken during the regularly scheduled class period. **Make-up examinations are discouraged.** Exceptions may be granted only by the faculty member or department chair, and only for unavoidable circumstances (illness verified by a signed physician's note, participation in intercollegiate athletic events, subpoenas, jury duty, military service, bereavement, or religious observance). A make-up final examination may be scheduled only with the permission of the appropriate Quinlan Assistant or Associate Dean.

If a make-up examination must be given, it is the responsibility of the faculty member to prepare, schedule, and proctor the exam. Limited assistance in proctoring make-up exams may be available through a designated Quinlan administrative assistant. For a student with a documented special testing need, please consult University policy concerning the use of the testing center in Sullivan Center at Lake Shore Campus.

### **Academic Integrity**

All members of the Quinlan School shall refrain from academic dishonesty and misconduct in all forms, including plagiarism, cheating, misrepresentation, fabrication, and falsehood...Plagiarism or cheating on the part of the student in individual or group academic work or in examination behavior will result minimally in the instructor assigning the grade of "F" for the assignment or examination. In addition, all instances of academic dishonesty must be reported to the chairperson of the department involved.

For further information about expectations for academic integrity and sanctions for violations, consult the complete Quinlan School of Business Honor Code and Statement of Academic Integrity on the Quinlan website:

<http://luc.edu/media/lucedu/quinlan-graduate/pdfs/Honor-Code-Quinlan-July2012.pdf>

### MGMT 472 COURSE OUTLINE

<b>Class Schedule (Spring 2019)</b>		
<b>This class may occasionally deviate from the course outline above. The instructor reserves the right to make changes as needed to the course syllabus.</b>		
<b>Class &amp; Date</b>	<b>Topic and Readings</b>	<b>Assignments</b>
Session 1 2/20/2019	Topics: <ul style="list-style-type: none"> <li>• Introduction</li> <li>• Foundations and History of Organization Development</li> </ul> Readings: Anderson: Chapters 1 and 2; HBR 10: <i>Leading Change: Why Transformation Efforts Fail</i> , Kotter, J.	Getting to Know You Questionnaire  In-class: Form learning teams, select case studies, and topics for final projects
Session 2 2/27/2019	Topics: <ul style="list-style-type: none"> <li>• Values and Ethics in Organization Development</li> <li>• Foundations of Organizational Change</li> </ul> Readings: Anderson: Chapters 3 and 4; HBR 10: <i>Cracking the Code of Change</i> , Beer, A. & Nohria, N. HBR 10: <i>The Hard Side of Change Management</i> , Sirkin, H., Keenan, P. & Jackson, A. Article (Handout): <i>The Art of Powerful Questions</i>	In-class exercise (values)
3/06/2017	Spring break – no class	
Session 3 3/13/2019	Topics: <ul style="list-style-type: none"> <li>• Responsible Change Leadership</li> <li>• Self as Agent of Change</li> <li>• Understanding Complexity of Change</li> <li>• Technical Problems vs. Adaptive Challenges</li> </ul> Readings: Anderson: Chapters 5 Immunity to Change: <i>Chapter 1 – Reconceiving the Challenge of Change</i> , Kegan, R. & Lahey, L. (Handout) HBR 10: <i>The Real Reason Why People Won't Change</i> , Kegan, R. & Lahey, L. HBR 10: <i>A Survival Guide for Leaders</i> , Heifetz, R. & Linsky, M.	***Project outlines due***  ***Assignment: will be handed out class 3 and due prior to class 4***
Session 4 3/20/2019	Topics: <ul style="list-style-type: none"> <li>• OD Consulting Process: Data Gathering/Data Analysis &amp; Diagnosis, Feedback</li> </ul>	In-class exercise

	<p>Readings: Anderson: Chapters 6, 7, 8 HBR 10: <i>Tipping Point Leadership</i>, Kim, W. &amp; Mauborgne, R.</p>	
<p>Session 5 3/27/2019</p>	<p>Topics:</p> <ul style="list-style-type: none"> <li>• Introduction to OD Interventions</li> <li>• Individual Interventions/Team Interventions</li> <li>• Whole Organization Interventions</li> </ul> <p>Readings: Anderson: Chapters 9, 10 and 11 HBR 10: <i>Change Through Persuasion</i>, Garvin, D. &amp; Roberto, M., HBR 10: <i>Radical Change the Quiet Way</i>, Meyerson, D.</p>	<p>Mid-term exam</p> <p>***Assignment: will be handed out class 5 and due prior to class 6***</p>
<p>Session 6 4/03/2019</p>	<p>Topics:</p> <ul style="list-style-type: none"> <li>• Leading vs. Managing Change</li> <li>• Resistance</li> </ul> <p>Readings: Anderson: Chapters 12 and 13 HBR 10: <i>Why Change Programs Don't Produce Change</i>, Beer, M., Eisenstat, R. &amp; Spector, B. Sustainability Article Sustainability links</p>	<p>Case Study Presentations</p> <p>***Assignment: will be handed out class 6 and due prior to class 7***</p>
<p>Session 7 4/10/2019</p>	<p>Topics:</p> <ul style="list-style-type: none"> <li>• Contemporary Trends in Organizational Change and Development (Dialogic vs. Diagnostic OD)</li> <li>• Leading Complex Organizational Change</li> </ul> <p>Readings: HBR Article: <i>Change Through Appreciative Inquiry</i></p>	<p>Case Study Presentations In-class Simulation: Power and Influence</p>
<p>Session 8 4/17/2019</p>	<p>Topic:</p> <ul style="list-style-type: none"> <li>• Current methods and tactics for implementing strategic change initiatives</li> </ul> <p>Readings: HBR Article: <i>Reconceiving the Challenge of Change</i></p>	<p>Case Study Presentations Case Study Papers Due</p>
<p>Session 9 4/24/2019</p>	<p>Topics:</p> <ul style="list-style-type: none"> <li>• Sustaining Change</li> <li>• Global Issues in OD</li> <li>• The Future of OD</li> </ul> <p>Readings: Anderson: Chapters 14, 15 and 16</p>	<p>Case Study Presentations</p>
<p>Session 10 5/01/2019</p>	<p><b>FINAL PROJECT PRESENTATIONS</b> <b>Evaluations</b></p>	<p>Executive Summary Papers Due Peer Evaluations Due</p>