PRINCIPLES FOR LEADING REFORMS AND POLICY CHANGE IN EDUCATION SYSTEMS *(The Israeli case)*

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Abstract: *The increasing processes of globalization and competitiveness, and the increasing complexity of organizations and the goals they promote, make changes necessary in the last decades to adapt the public systems to internal and external changes. Therefore, promoting organizational changes and performing change moves are the main part of modern organizational activity, policy, and leading reforms, and considerable resources are allocated for them. This article presents and analyses various innovative opinions and perspectives of approaches to educational policy and focus on principles for implementing educational policy reforms in the countries. this analysis is made through a critical literature review, which analyzes professional literature based on empirical research in education, national policy approaches, and organization management. The analyses mainly present pragmatic aspects that influence on a day-to-day basis strategy characteristic from a macro and micro point of view in educational policy management. The global McKinsey report (from 2018) is deeply reviewed and so are the sources from the OECD international library. This expanded mix is integrated with the researcher's approach and accumulated experience, which will be reflected in an interdisciplinary analysis of the proposed reform, emphasizing the Israeli case. The summarizing part includes a comparative discussion, divided into conclusions between the McKinsey report conclusions and the required operation for implementation in Israel and a final summary*

Key Words: Education Policy; Globalization; Organizational Changes; Competitiveness.

JEL Classification: I2, L38, P11.

Introduction

The increasing processes of globalization and competitiveness, and the increasing complexity of organizations and the goals they promote, make changes necessary in the last decades to adapt the public systems to internal and external changes. Therefore, promoting organizational changes and performing change moves are the main part of modern organizational activity, policy, and leading reforms, and considerable resources are allocated for them (Brunsson, 2009). According to Rice (2012), education is the cornerstone of societal progress, and governments worldwide are continuously reforming their education policies to meet the demands of the modern era. Payne (2012) adds that despite these challenges, education policymakers are striving to create flexible, innovative, and inclusive education systems that empower students to succeed in an ever-evolving world. The professional literature on this subject is broad, diverse, and in-depth. The current article, in its methodologic approach, will focus on a critical review of the literature and the Israeli case study. The wide picture also includes the writer's opinion which is based on his experience in the Israeli education system. The source analysis will lead to a fruitful academic discussion examining philosophical perspectives in educational policy reforms, but mainly pragmatic approaches that can influence the challenging coping with urgent changes, including international crises and technological progress such as artificial intelligence. The research

conclusions will be handed over to opinion leaders and decision-makers in the Israeli Ministry of Education and the local authorities.

Reforms of education policy

The difficulties in leading a change in the education system cause education systems to stay very traditional and unchanged despite many worldwide reforms and changes that were launched (OECD, 2017b; OECD, 2016). Pont (2017) claims that the contradiction between dealing with a change and the lack of actual change is also caused by the fact that most of the research deals with the aspects that require change and thoughts about the desired change nature, rather than with the practical and systematic aspects involved in implementing the change, such as monitoring the reform effects and using various policy tools to carry them out (Rice, 2012). Despite the difficulty in leading a change, it is often a necessity, and there is no way but to try to change even if it may not succeed. Researchers and policy leaders do continue dealing with issues related to planning and leading changes. Extensive and diverse research performed in recent years continues to examine the principles increasing the chance of success in implementing reforms and changes and the reasons for their failure. Based on experience, the researchers make their best to propose a modest approach and point to general principles that have to be adjusted to each reform and each change according to each one's unique nature and context.
Namely, the approach of "one size fits all" is wrong in designing and applying changes (Payne, 2008). Therefore, many researchers see a reform application to be more "art than science" (McKinsey, 2018). The current article deals with formulating principles that contribute to success in leading reforms and changes in public systems in Israel, especially the education system. The necessity to make changes is expressed in most public systems, but it seems especially prominent in the education system. Many factors are motivated to promote change in the education system for many reasons, but as presented above - the actual application of a change is complex and it is hard to point to clear successes. The gap between the strong desire to make a change and the few successes, if any, emphasizes the need to perform ordered learning processes when making reforms and changes, including learning the success and failure factors (McKinsey, 2018; Nilsen, 2015, Nilsen, 2020).
The article writer will herein present two reforms that were launched as extensive projects that sought to outline principles for implementing policy changes and reforms based on practical experience and international research. The first reform-change was performed by the strategic consulting company McKinsey, and included an analysis of significant changes in public systems and were the basis for formulating various principles (2018). The second project was performed for the OECD and was based on the analysis of research and case studies of reforms and policy implementation in education systems in the organization countries, aspiring to adjust it to the Israeli system.

Reform in public organizations in Israel - Mckinsey 2018

The strategic consulting company McKinsey conducted extensive research to examine the characteristics of successful policy changes. The research methodology included several components: a questionnaire answered by about 3,000 public servants who have participated in the attempt to lead big changes in the public sector in Israel; 13 in-depth interviews with over 30 public servants who led successful changes; and an examination of more than 80 change case studies in public systems in Israel. Based on the analysis of various information sources, the researchers formulated five main principles required for the effective implementation of policy change. According to the researchers, the principles are universal and generic - they are relevant in different policy areas for settlements similar in their demographic, economic, social, and cultural composition. The research conclusions

may be implemented at different government levels (for example, at the city, and the local authority level). The main principles for any organization's success include the following elements. The *first* is the leaders / leadership commitment - having a person who leads the outline, out of a complete commitment to the change. His conduct and actions that show leader commitment due to the report are: a) The leaders should be dominant to their subordinates and role models for those who participate in leading the reform. b) The leaders have to invest time and effort that will be noticed by the other stakeholders of the reform (the subordinates to the leaders, the public affected by the reform, and the political level), and listen to the public affected by the reform. c) The leaders must show personal responsibility for successes and failures. d) The leaders are required to be prepared to re-examine assumptions and conventions that have already been established, even if the change seems radical. e) Going to change moves will be performed only when it will be certainly and fully politically supported.

The *second* is defining clear goals and priorities - in many cases, the key to a successful change was concentrating the effort on a few focused goals that achieving was the change core. Setting clear priorities is required - more is less. Herein few practical steps recommended which in the report: a) Priorities should be set after finding out what are the issues that are most important to the public and the public servants. b) Few focused and accurate goals should be set rather than setting wide and vague goals. c) The potential benefits of achieving the goal must be illustrated, as well as the damages that will result from not achieving it. A clear presentation of the reform benefits guarantees the participant's commitment. d) The set goals have to be based on clear results while presenting the current situation in the areas planned for improvement. One of the key aspects is the ability to reliably assess the defined goals and the occurred changes. The inputs required for change and their effects on the change process must be linked.

The *third* principle is continuous and systematic work - continuous cooperation between units: to have the reform applied and maintain its initial momentum, it has to be advanced continuously while emphasizing the synergy between all partners. Therefore, reform leaders should be able to work with a variety of parties and solve problems that arise even if it is not in their standard area of responsibility. The practical steps recommended in the report are: a) Relevant stakeholders must be shared in the goal definition and policy planning. Sharing contributes to the continuity and conduct of the implementation process — "participatory planning is better than perfect planning". b) Budgeting all the stages of the reform implementation must be sufficient for the entire plan. This will avoid frictions and stoppages arising from the need to raise budgets for the reform during it. d) Quick victories should be produced to create a sense of success and momentum. It is recommended to set some easily achievable goals in the first stages. e) The bureaucratic barriers that could delay the change must be examined in advance to allow continuous work on the reform. Here, too, joint planning can help to locate the barriers and prepare solutions.

The *last* principle refers to professional ability in leading change - leading changes requires expert professionals. This expertise includes three main layers: ability and experience in leading complex changes on a large scale; Skills and experience in program and project management; and analytical and digital skills. The practical steps include: a) The implementation plans must not be general but specifically adapted to the needs. b) The reform leaders' abilities must match their specific needs. Therefore, resources must be invested in employee training programs in the organization. If there is still a gap between the capabilities and the needs, employee recruitment should be considered from outside the organization and even outside the public sector. c) To make a change, there is often a need for a perceptual change among the employees regarding the regular conduct of the organization. To encourage change, changes must be made in the system structure, for example in the training, reward, and evaluation system, and the organization executives must change their behavior and set an example. d) For the change implementation, the technical and strategic professionals must participate in leading it from the beginning.

In summary, in new changes, reforms and policy setting the policy goals or the undesired phenomena seek to reduce should be accurately defined and the policy should be shaped in accordance. The leaders / leadership have a very important part in leading a change in the education system. The change levers must be identified, namely, the Archimedean points in the short, medium, and long term that will lead to change by defining clear goals and priorities. Systemic thinking on the change theory, namely, the main vectors that are essential for promoting the desired results in the education system, must be promoted through systematic and continuous work. The system bottlenecks must be identified and the exact tools to reduce them and help in achieving the goals must be found.

A proposal for reform in the education system in Israel - OECD, 2019

The reform proposal for the Israeli education system was designed and written by the OECD in 2019, and its implementation began during the first months of 2020, before the COVID-19 pandemic. The proposal dealt with the practical aspect of innovative policies in education systems. The proposal outlined a practical framework of principles for a successful implementation of an educational policy. The framework was based on a review of many literature sources, including peer-reviewed studies that dealt with the implementation principles of education policy, as well as policy papers written for the OECD that examined the reform implementation in the organization's countries in the years 2015-2020. The review was based on 150 publications of which 18 were theoretical frameworks for policy implementation mechanisms and 20 policy papers that dealt with the implementation of reforms that were performed (Nir, 2017). All the sources were analyzed using a method presented by Nilsen et al (2020) to convert the theoretical research findings into applicable principles. Four main motifs were drawn out of the reform. These motifs are repeated in the context of policy design; the stakeholders and their commitment level; the institutional policy and the social context; and a strategy to lead the actual implementation. Herein the article writer will present the four motifs and their characteristics. The first is the Policy shaping. The method in which the policy goals are set and framed is defined while shaping the innovative education policy for the whole system. These actions will greatly influence how officials and stakeholders perceive and act upon the new policies. The article author believes that some issues have to be considered in policy shaping phase:

Policy justification. The need that the policy is meant to meet must be clearly defined. In the education area there are many issues that policy promoters are required to deal with, and clarifying the need for allocating resources to a specific issue is essential to make it a top priority. Beyond presenting the needs that the policy faces with pedagogical processes, it is better to present the purposeful aspects of the economy, civil society, culture, demographic composition, and the political factors of the policy (Haddad & Demsky, 1995).

Presenting the policy logic. Introducing the coherent process of defining the goals, objectives, and how they will be achieved. A systematic definition of the goals and objectives creates a thinking framework and delimits the resources to implement the policy (at the level of time resources, organizational attention, and financial resources). The lack of clear goals and priorities may lead different factors to perceive the policy differently and not be synchronized or even contradict it. In addition, the article writer claims it is important to present a theory that explains how the goals and objectives will be achieved to make all stakeholders understand how their specific actions contribute to the policy goals implementation.

Presenting the change feasibility. The stakeholder perception of the educational policy change program feasibility, both practical and political aspects, greatly influences their recruitment to promote it. It is essential to convince the stakeholders that there is an ideological and political mobilization to promote all the program stages and to respond to those who present barriers and failures that may prevent the program's promotion.

Stakeholders and their commitment level. The factors involved in the policy implementation are the main element of its success. Each stakeholder that is required to participate in the policy implementation is an agent who represents personal goals and values and contributes to the program implementation. Herein are some important points to strengthen the identification and commitment of stakeholders:

Identification. There is a great advantage in stakeholder identification to promote pedagogical policy. The main stakeholders relevant to the reform are those who are influenced by it, the principals, teachers, parents, and students. However, there are stakeholders in other circles that are influenced by and influence the reform, and having their identification is very important: the staff in the Ministry of Education, including supervisors from various units; the teacher training institutions, including teaching schools and institutions for advanced training; local authorities; worker organizations; civil society organizations; business sector; media; and policy researchers - local and international. Making these bodies identify or soften their objections are essential for policy implementation.

The implementation abilities of the partners-stakeholders. The stakeholders' ability to influence the policy is expressed in their possibilities and resources (including budgetary, political, and imagery resources), and their will to contribute to the policy. The article emphasizes the need to ensure that all stakeholders have the required abilities and that they are willing to cooperate in the times and cases it is required. If there are no reliable and properly skilled stakeholders, stakeholders should be trained in advance to perform the actions.

Reactivity. Adapting the reform to the needs raised by the stakeholders during its implementation: to maintain the stakeholders' support and adapt it to the needs arising from the field, **the literature emphasizes the vitality of mechanisms of policy consultation and adjustment during its implementation**. It is recommended to identify in advance the stakeholders relevant to the policy implementation and to examine its implementation in real-time to adjust through dialogue (Sabatier & Mazmanian, 1980).

The institutional policy and the social context. The policy context refers to the environmental characteristics where the educational policy is implemented: the operating institutions, the existing policy, events that precede the policy formulation, and changes simultaneous to the policy implementation. The local context, which the policy makers can influence, and the global context, which the policy makers cannot influence, may be distinguished.

Institutional frameworks. The institutional frameworks define the formal and informal social barriers involved in the implementation process. These barriers may include laws, social conventions, habits, etc. For example, the school's organizational culture affects the implementation of intra-organizational changes (local context), and the structure of the Ministry of Education affects the policy change implementation feasibility (global context). The institutional frameworks define how quickly and how deep policy changes can be. The policy promoters must know the institutional framework structure and its barriers and set realistic policy and implementation methods that must be determined according to the policy leaders' ability to implement the change within the system.

Parallel policy measures. Implementing many reforms and policy changes simultaneously burdens the system and hardens to exhaust each change. Accordingly, situations in which the actions and messages resulting from the policy do not overlap and even contradict may occur. For reform to be effective, it must be coordinated with reforms and other policy moves that the ministry and the government are implementing.

A strategy for leading the actual implementation. The implementation strategy refers to the aspects to be included in an executive plan for reform and change implementation. This section presents concrete actions emphasized by literature as essential for effective policy implementation.

Task division and accountability mechanisms establishment. Policy implementation requires clarity of all participants' responsibilities and the consequences of failures in the implementation process on the employees. Therefore, in the policy formulation phase, the partners and the responsibilities division must be indicated according to areas and times. It is also recommended to examine the possibility of defining the formal responsibilities of key stakeholders as part of the policy planning documents.

Goals. The goals, vision, and reasoning underlying the policy should be formulated in operational terms. Defining the priorities as part of the goals and objectives is essential for adequate resource allocation. Defining a limited number of measurable, ambitious but possible goals that do not harm the present school conduct is essential for the successful implementation of a reform (OECD, 2016). Policy tools. An extensive variety of policy tools that allow for achieving pedagogical goals was presented during the last decades. The selection of policy tools greatly influences the reform dynamics and the policy. We can use tools of strict and binding regulation based on binding laws and punishment in cases where the laws are not followed. These tools are effective when the government can monitor and punish violations. However, there are soft regulation tools that attempt to encourage those who are supervised to follow the regulatory goals without obliging them. These tools are effective when cooperation can be expected. The tool selection affects the interactions between the supervisors and the supervisees and the will of those who are supervised to cooperate with the supervisors in other contexts.

Resources. To implement a policy, resources of knowledge, budget, and technology are often required, but in addition to the resource availability, an outlined strategy is also required for their use - how it will be done and for what needs. In establishing an education policy strategy, several things must be considered: having the required resources, the sources that provide the resources, the certainty that they will be provided during the policy implementation, how the budget is allocated, and defining minimal budgeting needed for the program.

Collecting and tracking information. Collecting information and using it effectively is an essential aspect of leading and implementing education policy. We may refer to various types of information: information on student achievements (in national and international tests), teacher attitudes, student attitudes, etc. Objective information provides feedback to stakeholders regarding the policy implementation. Thereby, it allows the partners to adjust their behavior to the policy requirements, make the participants commit, and allow even those who are not active to be updated on the policy products. In addition, collecting information allows for managing the policy implementation effectively and systematically by making changes during the implementation process.

Timing. When planning the policy, it is important to examine when it should be started, the duration of effective implementation, and when it should be stopped, whether due to its implementation in the system or the need to shelve it. There is often a tension between the desire to implement policies quickly to reap political achievements and the professional needs that take a longer time. Research indicates that a too fast policies implementation often results in stakeholders that are not keeping up, and therefore do not succeed or are not interested in participating in the implementation process; On the other hand, when the implementation pace is too slow, the support for the policy and its momentum are lost (Tummers, 2012).

Comparison between the McKinsey model and the OECD model and conclusions for application.

Analyzing and comparing the two models show that they share some principles, almost completely, reflected in the following conclusions. The *first* conclusion refers to the responding to a need. A principle that both international models share and is suitable to implement in the Israeli model is that the policy change should be based on an agreed public

need. When all partners see the need, the ability to lead change increases. The need that policy response, which is based on data that shows the expected benefits from the policy change, may justify the policy and place it as a top priority for decision-making, recruit partners, and make them commit even during the implementation phase.

The *second* describe the selecting the most effective and appropriate policy tool to meet the needs. After we have identified the public need that the policy is meant to meet, it is important to select the most effective and appropriate policy tool to meet the needs. This is an additional principle repeated in the international models. There are many policy tools, on the spectrum between regulation, incentives, and advocacy, and it is important to adapt the exact policy tool to each public need. Sometimes more than one policy tool is required or combining several tools. Another conclude, the *third*, is about creating and priorities. An additional principle that is mutual to the two models is a clear and public presentation of the policy objectives. A clear formulation of the objectives allows the stakeholders and the operators to understand what is expected of them, deriving the actions of all the participants, and creating accountability.

Another conclusion becomes clear, the *fourth* conclusion, is on the stakeholder involvement issue. The repeated principle concerns the partners. Systematic and continuous work with the relevant stakeholders must be created by strengthening their commitment to contribute to advancing the policy. The main emphasis is on open and continuous communication channels and on understanding the unique contribution and profit of each participant. McKinsey's model cleared that it is not necessary to please everyone and that the focus should be on the most relevant stakeholders.

The *fifth* conclusion shows the need to update the teaching staff training process because**.** other principle that is mutual to the two models is referring the officials who will be required to implement the new policy. It is necessary to make sure that the officials can lead the change and have the resources to do it. Sometimes they have to be trained or there is a need to recruit new officials. Both models emphasized the need for all officials, especially those in the field, to identify with the policy change.

The *sixth* conclusion refers to the aspect of proper and appropriate resource allocation. This principle presented in the models is that adequate resources to lead the change must be allocated in advance, both in the budgetary aspect and in the aspects of physical and technological infrastructures and knowledge resources. In addition, a strategy must be outlined for how the resources are used, among other things from the aspect of budgetary flexibility for all ranks. The next conclusion, the *seventh*, emphasizes a significant component, reexamining the evaluation methods, measuring, and the learning factor out of experiencing**.** Another common principle for both models is the need for constant learning and updating the policy guidelines accordingly. In this context, it is important to maintain an open dialogue with the field, along with systematic data collection that will enable learning and improvement. Furthermore, both models emphasized the importance of measurement as a tool for learning, improving, and motivating all the change promotion partners.

The *eighth* conclusion discusses the importance of having leadership that can change and lead processes conclusion discusses the importance of having leadership that can change and lead processes**.** Two principles that were part of the McKinsey model and also expressed in the European model are the leaders' commitment and professional ability in leading change. The McKinsey model highlighted the role of policy change leaders and the necessity for them to publicly demonstrate their commitment to change by investing time and effort, as well as by showing a personal responsibility for successes and failures. Both the OECD and McKinsey models referred to the general political mobilization for the change promotion all the way. The McKinsey model emphasizes the professional ability in leading change. According to this model, leading a change is an expertise that includes systemic management skills and analytical skills, since it also requires changes in the system structure and harnessing all the system employees to action.

The *last* conclusion refers to the need to build a change-promoting organization**.** A principle expressed in both models is the need to adapt the organizational structure of the system in general and of the schools in particular to the desired change. The OECD model emphasizes institutional frameworks, such as organizational culture and organizational structure, which may be a barrier to leading change. The sources that will be the basis for the Israeli model, also greatly attribute the projector as having powers that bypass the many units in the Ministry of Education, to the lack of coordination and cooperation between the units, and to the need for flexibility in the manager's decision-making.

In summary, shaping an educational policy as an adequate response to the globalization challenges requires a holistic approach to several aspects: immigration, economy, environment, and technology. The assumption is that to shape a policy that will respond to many of these challenges, coordination between key areas in education: curriculum planning, teaching, and teacher training, and of course, appropriate leadership from all stakeholders is required. As discussed in both models and the recommendations for implementation for the Israeli system, the transition from an education system that emphasizes learning-defined content to a skill-oriented education system poses a significant challenge arising from the ambiguity of the qualifications statement. As the article writer has described above, the great majority of policy makers and educational paradigms in Israel share the desire to lead a change in pedagogy and make it deeper, but it seems that they are unable to put the policy into effect, unless they adopt insights such as the models presented.

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