WINTER 2027

LEGACY

TRANSFORMATION IN ACTION

A PEER REVIEWED JOURNAL

SHOWCASE EDITION

The Conditions That Make Transformation Sustainable



Joan M. Jackson, Ph.D.

Engagement as the Key to Education Transformed

The Worthy Educator
theworthyeducator.com

WINTER 2027
LEGACY®
TRANSFORMATION IN ACTION

The Conditions That Make Transformation Sustainable

doi.org/10.67428/2027winter06

Joan M. Jackson, Ph.D.
From Me To You Consulting North Beach, Maryland



Change is a constant in education. New initiatives, technologies, instructional approaches, accountability expectations, organizational structures, and community priorities continually ask educators and educational organizations to adapt.

Yet implementation is not the same as transformation.

An initiative may be introduced, trained, communicated, monitored, and even successfully implemented without producing sustainable organizational change. The more difficult question is what happens after the initiative is introduced. Do people have the conditions they need to learn, adapt, contribute, and continue the work? Does the organization learn from experience? Can people speak honestly about what is working and what is not? Are those most affected by a change able to influence how it develops?

These questions move the conversation beyond managing change toward creating the conditions in which transformation can become sustainable.

Research across organizational learning, leadership, psychological safety, human agency, participation, collaboration, and implementation has examined many of these conditions independently. The opportunity for educational leaders is to consider how these conditions interact rather than treating them as separate concerns.

That is the starting point for the Jackson Transformational Change Framework.

Transformation Happens Through People and Conditions

Organizational change is often discussed in terms of structures, strategies, processes, and outcomes. Those elements matter. Yet organizations do not transform simply because a new structure has been announced or a new process has been implemented.

People interpret change. They assign meaning to it. They determine whether they trust the process, whether they believe their knowledge matters, and whether they see themselves as contributors to what comes next.

Bandura's work on human agency provides an important foundation for understanding this process. People are not simply recipients of organizational circumstances. They can exercise intentionality, influence their environments, and participate in shaping outcomes (Bandura, 1986).

Belonging also matters. Baumeister and Leary (1995) established the importance of the human need to form meaningful interpersonal bonds, while Wenger (1998) demonstrated how participation in communities of practice contributes to learning, identity, and shared knowledge.

For educational organizations, the implication is practical.

People are more likely to contribute meaningfully when they can see themselves as part of the organization, understand why the change matters, recognize their own capacity to influence the work, and believe that their experiences and knowledge have value.

These are not peripheral considerations.

They are conditions for transformation.

Psychological Safety Makes Learning Possible

Transformation requires learning, and learning requires people to be able to surface information that may be uncomfortable.

Edmondson's (1999) research on psychological safety demonstrated the importance of a shared belief that a team is safe for interpersonal risk taking. Subsequent scholarship has continued to examine psychological safety as a condition associated with learning, voice, and interpersonal interaction in organizations (Edmondson & Lei, 2014).

Psychological safety does not mean eliminating disagreement or lowering expectations. It creates space for people to ask questions, identify problems, acknowledge uncertainty, and challenge assumptions without assuming that doing so will result in interpersonal punishment.

This distinction matters during educational transformation.

If educators are expected to identify implementation barriers but feel that raising concerns will be interpreted as resistance, leaders may receive incomplete information. If students and families are invited to provide feedback but see no evidence that their perspectives influence decisions, participation can become symbolic. If staff members are expected to experiment with new practices but are penalized for acknowledging what did not work, organizational learning becomes more difficult.

The practical question is therefore not simply whether an organization communicates a change.

The question is whether the organization has created conditions in which people can tell the truth about their experience of that change.

Voice Is More Than Participation

Educational organizations frequently use the language of engagement, consultation, collaboration, and stakeholder voice.

Those concepts are important, but participation alone does not guarantee influence.

Arnstein's (1969) classic discussion of citizen participation demonstrated that different forms of participation can provide very different levels of power and influence. More recent scholarship on voice and participation similarly points toward the importance of understanding who is heard, how knowledge is valued, and whether participation affects decisions.

This distinction is particularly important for transformation.

The people most affected by a change often possess knowledge that may not be available to those designing the change. They may understand practical barriers, unintended consequences, relationships, cultural considerations, and contextual realities that are difficult to identify from a leadership position.

This does not mean that the most affected person should automatically determine the decision.

It means that transformation is stronger when the knowledge of those affected is intentionally incorporated into how change is understood and adapted.

This is the basis for what the Jackson Transformational Change Framework calls the Impacted Voice Principle.

The principle moves beyond asking whether people were consulted. It asks whether the organization created meaningful opportunities for those most affected to contribute knowledge and influence the development of the change.

That is a different standard.

Leadership Creates Conditions

Leadership is often described through behaviors, competencies, positional authority, or the ability to influence outcomes.

Those dimensions remain important. However, sustainable transformation also requires leaders to attend to the organizational conditions surrounding the change.

Leaders shape what receives attention. They influence whether questions are welcomed, whether time is protected, whether resources are available, and whether people have meaningful opportunities to participate.

Leadership therefore operates not only through individual behavior but also through the structures and practices leaders establish.

This perspective is consistent with research on organizational learning, where leaders have an important role in creating environments in which people can examine assumptions, learn from experience, and adapt organizational practice (Argyris & Schön, 1996; Senge, 2006).

It also expands how leadership can be understood in educational transformation.

Influence does not exist only at the top of an organizational chart. People may possess positional authority, relational influence, or experiential knowledge that becomes important during change.

The leadership question becomes:

What conditions are we creating that allow the organization to use the leadership, knowledge, and experience that already exist within it?

That question shifts leadership from directing change toward stewarding the conditions in which change can develop.



Collaboration Has to Be Intentional

Collaboration is frequently presented as an inherently positive practice.
Research and professional experience suggest a more complicated picture.

People can work together without developing shared understanding. Teams can meet without influencing decisions. Organizations can create committees without creating meaningful collective responsibility.

Collaboration becomes more consequential when people have a shared purpose, sufficient psychological safety, clear responsibilities, opportunities to contribute, and mechanisms for learning from one another.

This connects directly to organizational learning. Argyris and Schön (1996) emphasized the importance of examining not only organizational actions but also the assumptions underlying those actions. Senge (2006) similarly positioned learning as a collective organizational capacity rather than simply an individual skill.

For educational organizations, this means collaboration cannot be reduced to meeting structures.

The more important questions are:

- ✓ What are people collaborating to accomplish?
- ✓ Whose knowledge is present?
- ✓ Who has influence?
- ✓ What happens to what the group learns?
- ✓ How does that learning affect the next decision?
- ✓ And does the organization provide enough protected time for people to do this work well?

Time is not a minor logistical consideration.

Time communicates organizational priorities.

When transformation is important but people are given no protected opportunity to examine evidence, develop relationships, discuss implementation, or adapt practice, the organization has created a structural contradiction. It has declared that transformation matters while providing insufficient conditions for transformation to occur.

Adaptation Is Part of Transformation

One of the persistent challenges in educational change is balancing consistency with responsiveness.

Organizations need enough consistency to maintain purpose and direction. At the same time, implementation rarely occurs in exactly the conditions anticipated during planning.

Implementation science has demonstrated the importance of understanding context when examining how interventions move into practice. The Consolidated Framework for Implementation Research, for example, emphasizes the interaction among characteristics of an intervention, organizational setting, individuals involved, and implementation processes (Damschroder et al., 2009).

This has an important implication for educational leaders.

Adaptation does not necessarily mean abandoning the original purpose.

Sometimes adaptation is what allows the purpose to remain viable in a changing context.

The Jackson Transformational Change Framework describes this tension as **Adaptive Fidelity**: preserving what is essential while adapting how the work is implemented in response to evidence, context, and experience.

This requires more than flexibility.

It requires disciplined reflection.

Organizations need mechanisms for gathering evidence, listening to affected people, examining unintended consequences, and determining whether adaptations strengthen or weaken the intended transformation.

Conditions Are Connected

The conditions described above should not be treated as a checklist.

Psychological safety affects whether people speak.

Voice affects whether leaders receive meaningful information.

Leadership affects whether voice is taken seriously.

Collaboration affects whether knowledge is shared.

Protected time affects whether collaboration can occur.

Evidence and reflection affect whether the organization can learn.

Adaptation affects whether implementation remains responsive to context.

These conditions reinforce one another.

When they are disconnected, transformation becomes more fragile.

For example, an organization may establish a formal stakeholder committee but fail to provide meaningful influence. It may invite feedback but lack a process for responding to what it hears. It may provide professional learning but not protect time for educators to apply, reflect upon, and adapt what they have learned.

The individual practices may appear reasonable.

The system surrounding them may not support sustainable transformation.

This is why transformation cannot be understood solely as a collection of initiatives.

It must also be understood as an organizational capacity.



From Change Management to Transformational Capacity

Change management remains important.

Organizations need approaches that help people understand change, prepare for it, adopt new practices, and sustain implementation. Established change management and implementation approaches have contributed significantly to this work.

The question is what happens beyond adoption.

What enables an organization to learn from transformation while it is occurring?

What allows people to influence how the work develops?

What helps leaders recognize emerging conditions rather than simply monitor compliance?

What enables an organization to adapt without losing its essential purpose?

These questions point toward transformational capacity.

Transformational capacity is not another initiative or another program. It is the organizational ability to learn, respond, adapt, and continue evolving.

The Jackson Transformational Change Framework approaches that capacity through the intentional stewardship of conditions.

The framework brings together bodies of scholarship that are often discussed separately: human experience, psychological safety, agency, voice, leadership, collaboration, organizational learning, implementation, evidence, and adaptation.

Its contribution is not the claim that these ideas are new. It is the proposition that they must be intentionally connected and stewarded if organizations expect transformation to endure.

Creating the Conditions

Educational leaders preparing organizations for the future therefore face a question that is both practical and strategic.

Instead of asking only:

> "How do we implement this change?"

We can also ask:

> "What conditions must exist for this change to become sustainable?"

That question changes what leaders look for:

- ✓ They look for whether people experience belonging and agency.
- ✓ They examine whether psychological safety allows honest information to surface.
- ✓ They consider whose knowledge is represented and whose experience is missing.
- ✓ They examine whether participation includes meaningful influence.
- ✓ They protect time for collaboration, reflection, and learning.
- ✓ They create mechanisms for evidence and adaptation.
- ✓ They recognize that leadership is distributed across positional authority, relationships, and experience.

And they understand that sustainable transformation requires stewardship rather than a single moment of implementation.

The future of educational change will require more than the ability to launch initiatives. It will require organizations capable of learning while they change. That is why the conditions matter.

Change is good. Creating the conditions for sustainable change is better.

References

Argyris, C., & Schön, D. A. (1996). *Organizational Learning II: Theory, Method, and Practice*. Addison Wesley.

Arnstein, S. R. (1969). A ladder of citizen participation. *Journal of the American Institute of Planners, 35*(4), 216 to 224.

Bandura, A. (1986). *Social Foundations of Thought and Action: A Social Cognitive Theory*. Prentice Hall.

Baumeister, R. F., & Leary, M. R. (1995). The need to belong: Desire for interpersonal attachments as a fundamental human motivation. *Psychological Bulletin, 117*(3), 497 to 529.

Damschroder, L. J., Aron, D. C., Keith, R. E., Kirsh, S. R., Alexander, J. A., & Lowery, J. C. (2009). Fostering implementation of health services research findings into practice: A consolidated framework for advancing implementation science. *Implementation Science, 4*, 50.

Edmondson, A. (1999). Psychological safety and learning behavior in work teams. *Administrative Science Quarterly, 44*(2), 350 to 383.

Edmondson, A. C., & Lei, Z. (2014). Psychological safety: The history, renaissance, and future of an interpersonal construct. *Annual Review of Organizational Psychology and Organizational Behavior, 1*, 23 to 43.

Senge, P. M. (2006). *The Fifth Discipline: The Art and Practice of the Learning Organization*. Revised edition. Doubleday.

Wenger, E. (1998). *Communities of Practice: Learning, Meaning, and Identity*. Cambridge University Press.



FROM ME TO YOU CONSULTING
Change Management Matters in Education

Joan M. Jackson, Ph.D. is an educator, educational leader, change management practitioner, author, researcher, and consultant whose work focuses on how organizations create the conditions for meaningful and sustainable transformation. With more than 35 years of experience in education and university administration, Dr. Jackson brings together change management, leadership, stakeholder engagement, community partnership development, curriculum development, and organizational transformation. Her work is grounded in a central question: How do organizations create the conditions that allow people, partnerships, and institutions to move from important intentions to sustainable impact?

Legacy is the official journal of The Worthy Educator, elevating the good work being done by leaders in education who are working to change the narrative on the profession and actively plan for impact that transforms its future to serve the needs of a diverse, decentralized, global society that is inclusive, equitable and open to all people as next generations adapt, evolve and contribute by solving problems and creating solutions that meet the needs of a world we have yet to envision.

Submissions are accepted from educators implementing new and innovative approaches to teaching and learning, as well as education organizations sharing their work in dedicated showcase editions, and are planned and released on a rolling basis. Learn more, including our submission guidelines for prospective contributors, at theworhtyeducator.com/journal.