

Phase 5
Maintaining Change
or
Revising the Plan

AN OVERVIEW of the phases



Phase 5: Maintaining Change or Revising the Plan



Phase 5

In Phase 5, you will be concerned with two issues:

- 1. Solidifying the changes that the action team has initiated; and*
- 2. Monitoring the system—e.g., collecting data for purposes of either validating the changes made or triggering another round of inquiry and innovation.*

Introduction

“Managers always want to pull up the radishes to see how they’re growing.”

—Retired Hanover CEO Bill O’Brien

At this point in the process, your team has the intervention strategy off the ground. One of the first questions to arise will be “Is it working?” If it looks like it might be, right behind that question will be “How long will it last?” If it looks like it might not be, the tendency will be to panic and quit. Organizations, like many organisms, including humans, have a strong tendency to revert to what is familiar. Initial stages of change require high maintenance, a lot of attention and consciousness. An analogy might be the level of awareness involved in learning a new skill, like driving a car. The energy and attention needed in the early stages of such skill acquisition is very different from what will be needed later on. Proactive measures taken to insure that the new process or program is being accepted by the organization are advised here. In instigating organizational change, it is wise to keep a finger on the pulse of the response in the organization.



Inertia: "A tendency to remain unchanged; a property of matter by which it continues in its existing state of rest or uniform motion in a straight line, unless that state is changed by an external force."

-Oxford
Encyclopedia
English
Dictionary

• The earlier discussions (Phase 2) regarding what will constitute success, what criteria will be used to measure change, come to the forefront.

• A concept from physics may be at work here—*inertia*. Inertia is defined as the tendency of a body to resist acceleration, as the tendency of a body at rest to remain at rest, or of a body in motion to stay in motion in a straight line, unless disturbed by an external force. There are a lot of forces in place keeping a system in the course or patterns it has developed over time to survive. Even if some of the parts are worn or dysfunctional, as long as it keeps on keeping on, change will happen only with a counteracting force, and will be sustained only if necessary supports are properly installed.

• During Phase 5, the team will be attending to:

- **integrating** and **interfacing** the new with what exists;
- the **results** or **outcomes** that the changes produce.

• Guiding Questions

• *These questions lead you to reflect on your system and your process to ascertain whether the issues of diversity and equity are being served by the team's efforts. Find your team's answers to these questions.*

- How has your change process affected the core identity of your system? If your system identifies itself as respectful and supportive of differences, do the changes you are working to instill enhance and enrich that identity?

An example concerns the child labeled Attention Deficit Hyperactivity Disorder (ADHD). Is he or she treated with more sensitivity and given more support, or does the label simply mean that it is acceptable and understandable to quit trying with him or her? Do the changes you are working to establish bring the system closer to living out the vision of its mission statement?

- Do groups that have historically been on the edges of the system recognize that the system has changed?

Sometimes changes are made and fringe groups are so uninvolved with the system that they fail to see them. How will you bridge such a gap? Is this a trust issue? How will you address it?

- Does the change truly open the system to the participation of historically underrepresented and underserved persons?

Many initiatives, with the best of intentions, merely repeat and/or offer variations on the same old song. How does this change intend to address the wariness of the unequal and uncommon folks toward yet another potential rejection or discriminating experience? Why would/should they trust this system now?



Integration

Concepts

Integration—Building It In

In the introduction to *Educating All Our Children*, we wrote about how natural systems diversify and change. Any change effort has to be known to the person or thing being changed, which must take new information into account to achieve success. Meg Wheatley, in *A Simpler Way*, suggests that change that emerges from within a system is more likely to survive than that imposed from without. This is in part due to the higher likelihood that change from within will build on and honor the core integrity of the system.

Whether the change surfaces from within or is brought into the system, it must ultimately be sensitively *integrated* into the existing system or, like an organ or tissue transplant, it will be rejected and sloughed off.

By **Integration** we mean understanding how the new change fits into, interfaces with, and enhances the existing structures in the system. And it means taking specific measures to recognize and acknowledge what has been and is being done, while offering alterations that will either add to or improve on these efforts. In essence, it means taking great care to see that the changes are in accordance with the core identity of the system, not in violation of it.

As the change process is implemented, a hand must be kept on the strings of the system to pick up the vibrations the movement will set off. Attention needs to be paid to offering information, reassurances, and support to the surrounding environment. Often a good listening ear is indispensable. But more concrete adaptations may need to be made to avoid setting up a great deal of dissonance and resistance. The bottom line is: Can the



INTEGRATION



ASSESSING OUTCOMES

• system adapt to, tolerate, and finally accept the proposed
• change? What attention to interfacing needs to occur for this to
• succeed?

• *Assessing Outcomes*

• With any change effort, successful or not, invaluable lessons can
• be learned. Indeed, sometimes “failures” can be both more
• interesting and more productive, in the long run, than innocuous
• “successes.” **Evaluation** or **Assessing Outcomes** serves both to
• mark change that has occurred and to inform and reform ques-
• tions that are spawned by the effort.

• In his new book *The Dance of Change*, Peter Senge deals exten-
• sively with the challenges that face anyone attempting to make
• profound changes in an organization. One diagram (p. 28)
• displays a number of responses an organization can and prob-
• ably will make to any change effort. The challenge of assessment
• or evaluation is one many of us are very familiar with. Assess-
• ment urges us to cement the belief in contemporary western
• culture that the only legitimate measurement is quantitative,
• choosing to ignore or deny that there are deep and relevant
• subjective processes that also affect change and success. W.
• Edwards Deming said that 97% of what matters in an organiza-
• tion can't be measured (Senge, 1999, p. 296). Senge quotes Gre-
• gory Bateson, who stated that many problems stem from the
• difference between the way human beings think and the way
• nature works. He observes that nature does not measure, i.e.,
• there is no standard for how high a tree should be. Bateson goes
• on to say that nature has no ends; it builds, continually, upon the
• interplay of the means of evolution and biology (Senge, p. 295). It
• is the use of assessment for *learning*—i.e., *formative* assessment--
• rather than assessment for reporting and justifying that we
• propose as a means of monitoring the change efforts in this
• process. This manner of measuring and evaluation rests on its
• ability to bring us ever closer to doing the work that matters in
• ways that have integrity.

GOALS AND OBJECTIVES

Goal I. To identify an existing change effort and to create an interface for the new initiatives.

Positive Outcomes:

- The proposed change is seen as a positive addition to the system.
- Change can occur with minimum disruption and destabilization.

Objective I.1. To review existing related efforts to ascertain the fit of the proposed change

Activity: Initiative Fit

Evaluation: Connections to existing initiatives are made and those involved in existing efforts can see and understand the relationship.

Objective I.2. To acknowledge existing effort and illustrate the place of the proposed change in the system.

Activity: Bragging About Ourselves

Evaluation: Does the proposed change grow out of, support, or in some way complement any existing initiatives? Do the persons involved in related programs, or efforts, see and understand the relationship of the proposed change to existing efforts?



INTEGRATING
THIS
INITIATIVE
WITH OTHERS
IN THE
SYSTEM



• **Goal II.** To be sensitive to and attend to the effects of the change effort on the system.

• **Positive Outcomes:**

- Both positive and negative disturbances are noted and responded to.
- The change effort honors the core identity so essential to system integrity.
- A mutuality / reciprocity is established and nurtured between old and new.

• **Objective II.1:** To establish a mechanism for “listening” to and responding to the system’s reaction / response to the change effort.

Activity: The Confessional

Evaluation: People in the target system have a way to make their reactions to the change known to the team. The team knows how it will process and respond to this information.

• **Objective II.2:** To make adjustments to the intervention effort and, if necessary, to re-start the inquiry / change process.

Activity: Review and Retool

Evaluation: The team has reviewed the original vision and determined whether it has been realized. If not, the team members have made changes needed to adjust and try again.

Summary Chart 5

Phase 5: Maintaining Change or Revising the Plan

Goal I: To identify an existing change effort and to create an interface for the new initiative.

Positive Outcomes

- The proposed change is seen as a positive addition to the system.
- Change can occur with minimum disruption and destabilization.

Objectives	Activities	Evaluation
<p>I.1. To review existing related efforts to ascertain the fit of the proposed change.</p> <p>I.2. To acknowledge existing efforts and illustrate the place of the proposed change in the system.</p>	<ul style="list-style-type: none"> • Initiative Fit • Bragging About Ourselves 	<p>Connections to existing initiatives are made and those involved in existing efforts can see and understand the relationship.</p> <p>Members of the system are sensitive to resistance and disturbance, and find ways to make change acceptable without compromising equity, teamwork, and the integrity of the system being changed.</p>

Goal II: To be sensitive to and attend to the effects of the change effort on the system.

Positive Outcomes:

- Both positive and negative disturbances are noted and responded to.
- The change effort honors the core identity so essential to system integrity.
- A mutuality/reciprocity is established and nurtured between old and new.

Objectives	Activities	Evaluation
<p>II.1. To establish a mechanism for listening to and responding to the system's reaction to the change effort.</p> <p>II.2. To make adjustments to the intervening effort and, if necessary, to re-start the inquiry/change process.</p>	<ul style="list-style-type: none"> • The Confessional • Review and Retool 	<p>The team has set up some device that allows members of the system to provide feedback.</p> <p>The team has reviewed the original vision and determined whether it has been realized. If not, the team members have made the changes needed to adjust and try again.</p>

