

Phase 5

Activities

Initiative Fit

Source: J. Borree

Purpose: To ascertain the fit of goals to various initiatives with that of the proposed changes.

Time Required: One-half Hour

Resources Needed: "What's Going On Here?" Worksheet from Phase 2; Contract from Writing a Contract Activity, Phase 4; newsprint

Procedure:

1. Using the worksheet from Phase 2, list various initiatives that are ongoing and their goals.
2. Review state goals and objectives of the proposed changes (Intervention Contract, Phase 4)
3. Link and relate where possible.
4. Add another column to the "What's Going On Here?" Worksheet to indicate how this change project fits with the existing initiatives you identified in Phase 2.
5. If the proposed change is a fairly major digression from other initiatives, indicate how and where the change builds on other initiatives as a foundation, how it extends or supplements them.

Reflection:

1. Can you see where your proposed changes fit with ongoing initiatives?
2. Can those involved in ongoing initiatives see where your proposed changes can be integrated?
3. Has everyone taken into account all children in the system?



Bragging About Ourselves

Source: J. Borree

- Purpose:**
- To honor and acknowledge previous efforts to address the issues in the change proposal.
 - To create positive momentum and energy.

Time Required: 1 Hour

Resources Needed: The Initiative Fit Chart; newsprint; pens, markers

Procedure:

1. With the Initiative Fit Chart (see Initiative Fit Activity, preceding) as the data base, create a display, ad, or handout that illustrates how the proposed change effort rests on previous efforts or presently existing efforts.
2. Give credit lavishly where possible.
3. Take credit lavishly where possible.

Reflection:

1. Did you point out to colleagues how their efforts have served as a foundation on which later initiatives can build? What was their reaction?
2. Were you able to see some success as a result of your own efforts?
3. If others did not understand or acknowledge their and your own efforts, how can you help them understand the significance of the work?



The Confessional

Source: J. Borree

Purpose: To allow members of the larger system to give feedback to the team.
To develop a procedure for “hearing to understand” the feedback.
To establish a procedure for responding to the feedback.

Time Required: 1-2 Hours

Resources Needed: Flipcharts, pens

Procedure:

The “confessional” in the Catholic Church allows people to articulate anonymously their troubles and cares and get advice in return, among other purposes. A mechanism with this intention might serve well to take the pulse of the system as the team works to implement the plan.

1. The team brainstorms ideas for eliciting and receiving feedback from the larger system, remembering the map of the informal communications network completed in Phase 4.

The criteria for such a mechanism might be:

- Allows anonymity
 - Is easily accessible
 - Is highly visible
 - Invites/encourages use
 - Encourages all forms of feedback—positive, negative, and creative.
2. A plan for implementing the chosen idea is made and timelines for implementation are determined.





3. The feedback mechanism is presented to the larger system with the idea that the team values and encourages its use and is committed to hearing and understanding the reactions the change is eliciting.
4. An initial plan for processing feedback is devised—i.e., an advocate presents each feedback statement for consideration by the team and pro/con teams are set up to present both sides of an identified issue.
5. Ideas for publicizing the feedback and the team's responses are discussed and some strategies are adopted; a bulletin board is set up to put feedback and responses on, a notice or column is written in the system newspaper or newsletter, etc.

Evaluation:

1. Do people in the target system have a way to make their reactions known to the change to the team?
2. Does the team know how it will process and respond to this information?
3. Has the team discussed how to depersonalize the information and not become defensive about negative information?

Review and Retool

Source: J. Borree



Purpose: At a point determined in the written contract, a review process should be triggered. The purpose is to ascertain whether the change effort has “taken,” needs to be refined, ought to be terminated, or a whole re-inquiry process launched.

Time Required: Depending on the scope and range of the project, this process could take several sessions of several hours’ duration each.

Resources Needed: All the documentation regarding the project and the change effort—especially the vision statement, the goals and outcomes, the criteria of success, the means for assessing, the plan, the contract, notes from implementation/support meetings, feedback from the system, and other pertinent material; flipcharts, pens, markers; members of all communities that might have been affected by the project.

Procedure:

1. On a separate flipchart page, put each of the following and post for all to see:
 - strategy / change implemented
 - specific goals and objectives of the strategy
 - criteria of “success” for it
 - means used for assessment, evaluation
 - feedback from the system about the change process



- comments/ observations of implementors/ team members
 - relationship/ connection to the vision
- (If more than one strategy was implemented, do the above for each.)
2. Select someone from the team to facilitate a report and review time.
 3. After hearing the review, allow some time for anyone who wishes to put their observations and comments on the designated sheets.
 4. Poll the group as to the next step to be taken. There should have been on-going reviews and adjustments throughout the process. This will include a decision to conclude, continue, or re-start the process.
 5. Depending on the decision, the following tasks should be assigned:
 - notification to participants, target system of the decision
 - a (final) report/ summary with recommendations to the appropriate constituents (See Sample Reporting Matrix, next page).
 - a restart planning and meeting set.

Sample Reporting Matrix

Strategy	Goals/ Objectives	Criteria for Success	Means of Assessing	Feedback from the System	Comments/ Observations	Relationship of Strategy to Vision

