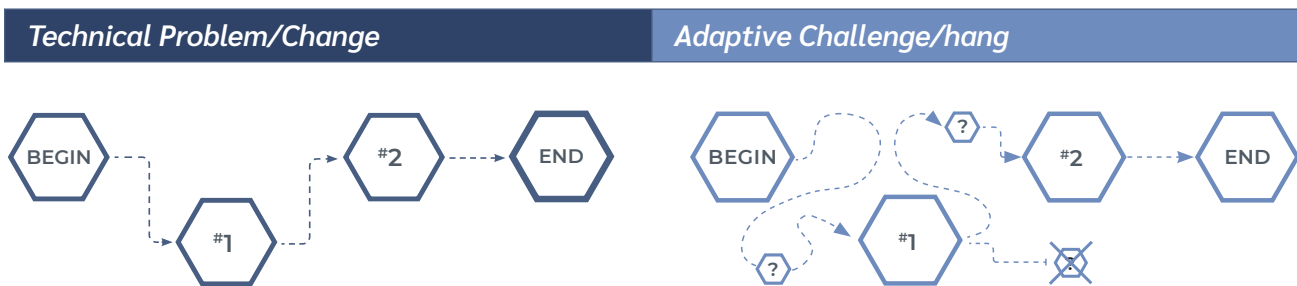




## Developing Change Acumen: Anticipating People's Needs During Change

Recognizing the technical and adaptive characteristics of change is a useful step in deepening change acumen. Most changes have both technical and adaptive characteristics. Leaders and consultants can use this tool to identify the technical and adaptive supports necessary during a change process.

### Characteristics of Technical and Adaptive Change



Even though they may be complex, technical problems can be solved with knowledge and procedures already in hand.

#### Characteristics

- Easy to identify.
- Clear answers, minimal uncertainty.
- Straightforward, few big choices.
- Executed via precise instructions.
- Linear, demands timelines and checklists.
- Can be solved by an expert or authority.
- Can be implemented with current knowledge and skills.
- Fits with existing norms, values, and systems.

Adaptive challenges cannot be resolved by expert knowledge and routine management alone. They require new learning, innovation, and new patterns of behavior.

#### Characteristics

- Difficult to identify (easy to deny).
- No clear answers, high uncertainty.
- Time-consuming, difficult choices.
- Demands dialogue and co-development.
- Nonlinear, demands creativity and feedback.
- Solved by people facing the challenge.
- Implementation requires new knowledge and skills.
- Requires examination of existing norms, values, and systems.

Assuming a change is all technical or all adaptive will leave leaders and consultants using only a limited set of skills and tools to manage change. Change occurs in phases, and people experience different needs in different phases of the process. Leaders and school improvement consultants need to consider both the phase in a change process and whether people are experiencing the change as technical or adaptive because these drive the supports that people need along the way.

The companion worksheet is organized by the phases of a typical change process. To use it, first develop a shared understanding of the change. Then use the characteristics of technical and adaptive change to plan for what people need to successfully navigate the change process.

# Anticipating People's Needs During Change Worksheet

## Instructions

**Step 1:** Briefly describe the change:

**Step 2:** Identify what phase of the change process you are in (Phases 1-5 in the next section).

**Step 3:** Consider how people are experiencing the change (technical and/or adaptive).

**Step 4:** Identify actions you can take to meet people's needs during each phase.

## The Phases of Change (1-5)

**Phase 1: Identify need for change** (Use data to determine the goal of the change initiative)

Technical	Adaptive
<p><b>Characteristics</b></p> <p>The need is clear and undisputed.</p>	<p><b>Characteristics</b></p> <ul style="list-style-type: none"><li>• The need is difficult to identify or agree on.</li><li>• Denial of the need is common.</li></ul>
<p><b>What people need</b></p> <p>Data on the need and a clear case for why the need is a priority.</p>	<p><b>What people need</b></p> <ul style="list-style-type: none"><li>• Opportunities to discuss and explore the problem.</li><li>• Time to examine the way their values and past experiences influence their view of the need.</li><li>• Recognition of what some may feel is being lost and support through the stages of grief.</li></ul>
<p>Actions to meet people's needs:</p>	

**Change phase 2: Select evidence-based solutions** *(Identify one or more strategies to address needs)*

Technical	Adaptive
<p><b>Characteristics</b></p> <p>There are clear and known evidence-based solutions to address the need.</p> <p><b>What people need</b></p> <ul style="list-style-type: none"> <li>• Budget considerations.</li> <li>• Metrics for assessing fit and ease of implementation.</li> <li>• Understanding of additional changes that will be required based on the solution.</li> </ul>	<p><b>Characteristics</b></p> <p>The nature of the need or the context demands a novel or adapted solution.</p> <p><b>What people need</b></p> <ul style="list-style-type: none"> <li>• Opportunities to develop and examine criteria for selecting the best solution.</li> <li>• Time to investigate and carefully consider new options</li> </ul>
<p>Actions to meet people’s needs:</p>	

**Change phase 3: Plan for implementation** *(Craft specific plans to carry out the change solutions)*

Technical	Adaptive
<p><b>Characteristics</b></p> <p>The plan is clear and systematic, citing who needs to do what and focusing on specific timelines and steps.</p> <p><b>What people need</b></p> <ul style="list-style-type: none"> <li>• Understanding of what is expected of them and when.</li> <li>• Access to experts who help with the solutions.</li> <li>• Plan for feedback mechanisms.</li> </ul>	<p><b>Characteristics</b></p> <ul style="list-style-type: none"> <li>• Creating stakeholder buy-in to the problem becomes a step before action can be taken.</li> <li>• The implementation plan includes time for exploration and learning.</li> </ul> <p><b>What people need</b></p> <ul style="list-style-type: none"> <li>• Vision of what successful implementation will look and feel like.</li> <li>• Understanding of how to adapt evidence-based solutions to the local context.</li> <li>• Balance of clarity and flexibility in guidelines for what counts as implementation.</li> <li>• Plan for intentional experimentation, testing possible solutions.</li> </ul>
<p>Actions to meet people’s needs:</p>	

## Change phase 4: Implement and monitor

*(Collectively execute change plans; assess and adapt along the way)*

Technical	Adaptive
<p><b>Characteristics</b></p> <p>Implementation is a matter of executing the plan and clearly defined action steps</p>	<p><b>Characteristics</b></p> <ul style="list-style-type: none"><li>• Learning and exploration are precursors to changed attitudes and actions.</li><li>• Monitoring yields data that inform adjustments to both the solutions and the implementation plan.</li></ul>
<p><b>What people need</b></p> <ul style="list-style-type: none"><li>• Leadership committed to overseeing the implementation.</li><li>• Project management support to meet timelines and expectations.</li><li>• Technical support to troubleshoot problems.</li></ul>	<p><b>What people need</b></p> <ul style="list-style-type: none"><li>• Leadership that empowers and mobilizes implementers.</li><li>• Reminders and evidence of how they have navigated adaptive change in the past.</li><li>• Ample time to learn</li><li>• Feedback delivered in an environment of trust and positive presupposition.</li><li>• Opportunities to share their experiences and learn from peers.</li></ul>
<p><b>Actions to meet people's needs:</b></p>	

## Change phase 5: Assess and reflect

*(Examine, celebrate, and communicate outcomes of the change initiative and plan next steps)*

Technical	Adaptive
<p><b>Characteristics</b></p> <p>Assessing the effort requires examining clear measures of whether the goal is met and learning from the process steps that were taken.</p>	<p><b>Characteristics</b></p> <p>Assessment and reflection focus on understanding how the successes and challenges contributed to progress toward the goal. Assessment includes how the system and individuals adapted and learned from the change and will apply lessons learned.</p>
<p><b>What people need</b></p> <ul style="list-style-type: none"><li>• Data on progress toward the goal.</li><li>• Documented standard operating procedures to communicate new ways of working.</li></ul>	<p><b>What people need</b></p> <ul style="list-style-type: none"><li>• Opportunities to reflect on their own growth and how intangible factors (motivation, values, agency) contributed to them change.</li><li>• Celebration of the growth achieved through the change effort.</li></ul>
<p><b>Actions to meet people's needs:</b></p>	