

Making Academic Change Happen
AKEPT - August 2015

Participant Worksheets

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Personalities and Communication

I'm probably going to have to communicate something critical about my proposed change to this person:

The core, unvarnished, critical idea that I need to make this person understand is:

What is this person's primary personality type color? What makes you think so?

What needs, values, and/or strengths can you hit on in your communication, so that it speaks directly to this person's primary personality type?

Go for it! Wordsmith your core, critical idea so that it speaks to this person's likely personality type color.

If you finish early, let's try it again!

I'm probably going to have to communicate something critical
about my proposed change to this person:

The core, unvarnished, critical idea that I need to make this person understand is:

What is this person's primary personality type color? What makes you think so?

What needs, values, and/or strengths can you hit on in your communication, so that it speaks directly to
this person's primary personality type?

Go for it! Wordsmith your core, critical idea so that it speaks to this person's likely personality type color.

Political Map Activity

The Political Map that you created focused on groups of people, or constituencies. Let's start including key individuals in your plans.

Different constituencies and individuals get involved in change actions in different ways, depending on their available time and energy. Working on your own, think about your proposed change. Who (groups and individuals) at your institution will fall into each of the following categories?

Change leaders (who orchestrate the process)

Contributors (who affect change through participation in subcommittees or task forces)

Resource people (who provide information or resources for others)

Informed people (who do not participate actively, but who stay up to date about what is occurring and why)

Constructive skeptics ('loyal opposition' who contribute useful critiques and commentary)

Resisters (who are invested, for a variety of reasons, in preserving the status quo. Resistance can be passive or active)

Consider the constituencies you identified in the Political Map exercise as well as the individuals you listed on the previous worksheet.

Who will want to be *informed* as your project progresses?

Who will want to be *consulted* as your project progresses?

Who will be *responsible* for aspects of your change project?

Who will be held *accountable* for the progress of your change project?

Teaming Plans - worksheet 1 of 2

The people I want to have on my change project team are:

Name	What this person would bring to the team	What else competes for this person's time?

Teaming Plans - worksheet 2 of 2

Name	This person's likely personality color, and constituency group from your Political Map	Given this person's personality, commitments, and constituency microculture, how might you make your change project something that this person really wants to help succeed?

Multiframe Thinking

How does your change project connect with the most commonly- or most-publicly espoused values of your institution?

How does your change project connect with the actual values of your institution?

Consider a previous project at your institution that was successful.

What challenges did this project face?

What forces, events, groups, factors ultimately helped it to succeed?



What are the key lessons to learn from this project regarding change at your institution?

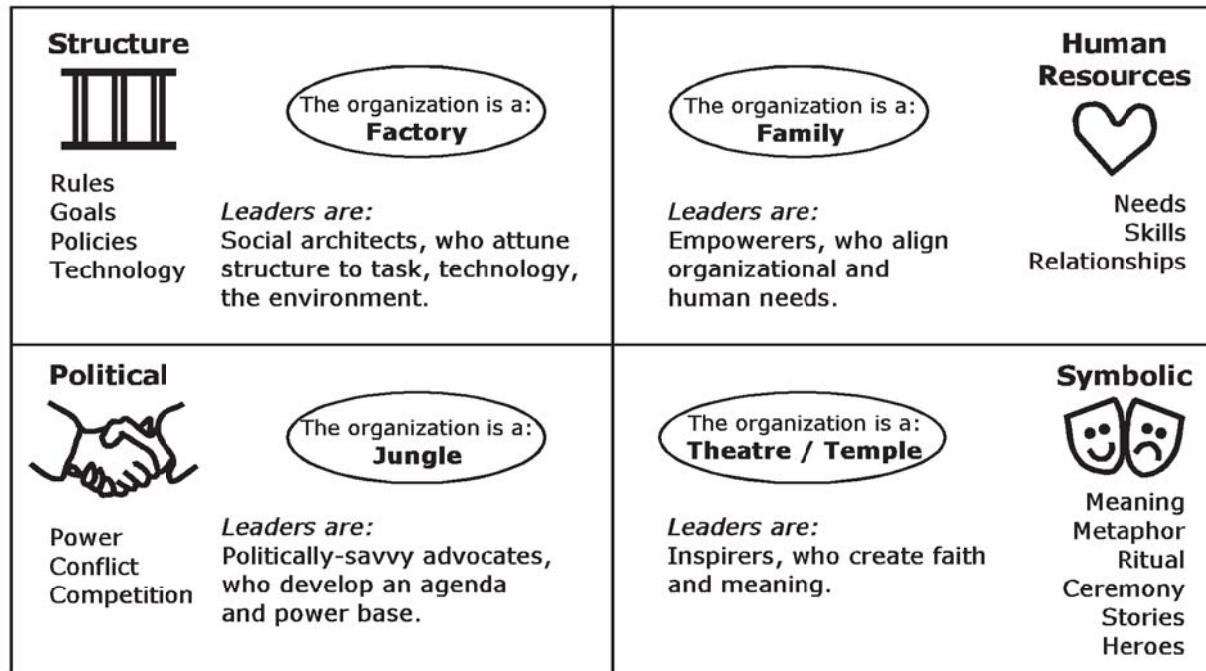
Consider a previous project at your institution that was not as successful as it might have been.

What challenges did this project face?

What forces, events, groups, factors ultimately helped it to succeed?



What are the key lessons to learn from this project regarding change at your institution?



The Four-Frame Model of Understanding Organizations. Practices, norms, behaviors and beliefs associated with all four frames underlie an institution's culture. All four frames should be considered to align change strategies with an institution's culture. Adapted from Bolman and Deal, Reframing Organizations (5th edition), Jossey-Bass, 2013.

Project attribute	If attribute applies to your project, consider these frames:	If attribute does <i>not</i> apply to your project, consider these frames:
Individual commitment and motivation are essential to success.	Human Resources, Symbolic	Structural, Political
The technical quality of the decision is important.	Structural	Human Resources, Political, Symbolic
The project involves high levels of ambiguity and uncertainty.	Political, Symbolic	Structural, Human Resources
There's a risk of significant conflict, or scarce resources.	Political, Symbolic	Structural, Human Resources
The project is a 'bottom up' project rather than a 'top down' project.	Political	Structural, Symbolic, Human Resources
Aspects of the project will require people to rethink their core functions or identities.	Human Resources, Symbolic	Structural, Political

Focusing on a Frame. Although all four frames should be considered when choosing change strategies, this table suggests frames that merit special consideration, based on change project attributes. Adapted from Bolman and Deal, 2013, page 311.

This is a worksheet to capture useful action items that were generated by mapping your project to the four frames.

Action Item:

Who (will do this, will be affected by this):

When (key dates/timing of this item):

How (What are the critical aspects of this action item?):

Action Item:

Who (will do this, will be affected by this):

When (key dates/timing of this item):

How (What are the critical aspects of this action item?):

Action Item:

Who (will do this, will be affected by this):

When (key dates/timing of this item):

How (What are the critical aspects of this action item?):

Difficult Conversations

	Your Department Head	The Dean	Colleague who is most comfortable with the status quo
What's each person's "story"? How does s/he see the situation?			
What is each person's "story" missing?			
For each person, craft an opening sentence that would start a conversation with an inviting Third Story.			

	Difficult Conversation Partner #1	Difficult Conversation Partner #2	Difficult Conversation Partner #3
What's each person's "story"? How does s/he see the situation?			
What is each person's "story" missing?			
For each person, craft an opening sentence that would start a conversation with an inviting Third Story.			

Buy-In

Your department chair stands up in the meeting and says "You are abandoning our traditional values!"

Step 1: Acknowledge and deflect

Step 2: Generalize in your favor

Step 3: Provide a familiar example

Step 4: Summarize in your favor

A colleague who always works against your ideas says "You haven't considered all of the downstream ramifications of your proposal. Your idea will inevitably lead to disaster."

Step 1: Acknowledge and deflect

Step 2: Generalize in your favor

Step 3: Provide a familiar example

Step 4: Summarize in your favor

Engines and Anchors

What are your anchors really made of? Choose an anchor, and fill in the blanks below to briefly describe the problem that anchor poses. Then, answer the following 'five whys.'

" _____ will likely hold back my proposed change by _____."
(anchor) (probable action(s) of anchor)

1. Why?

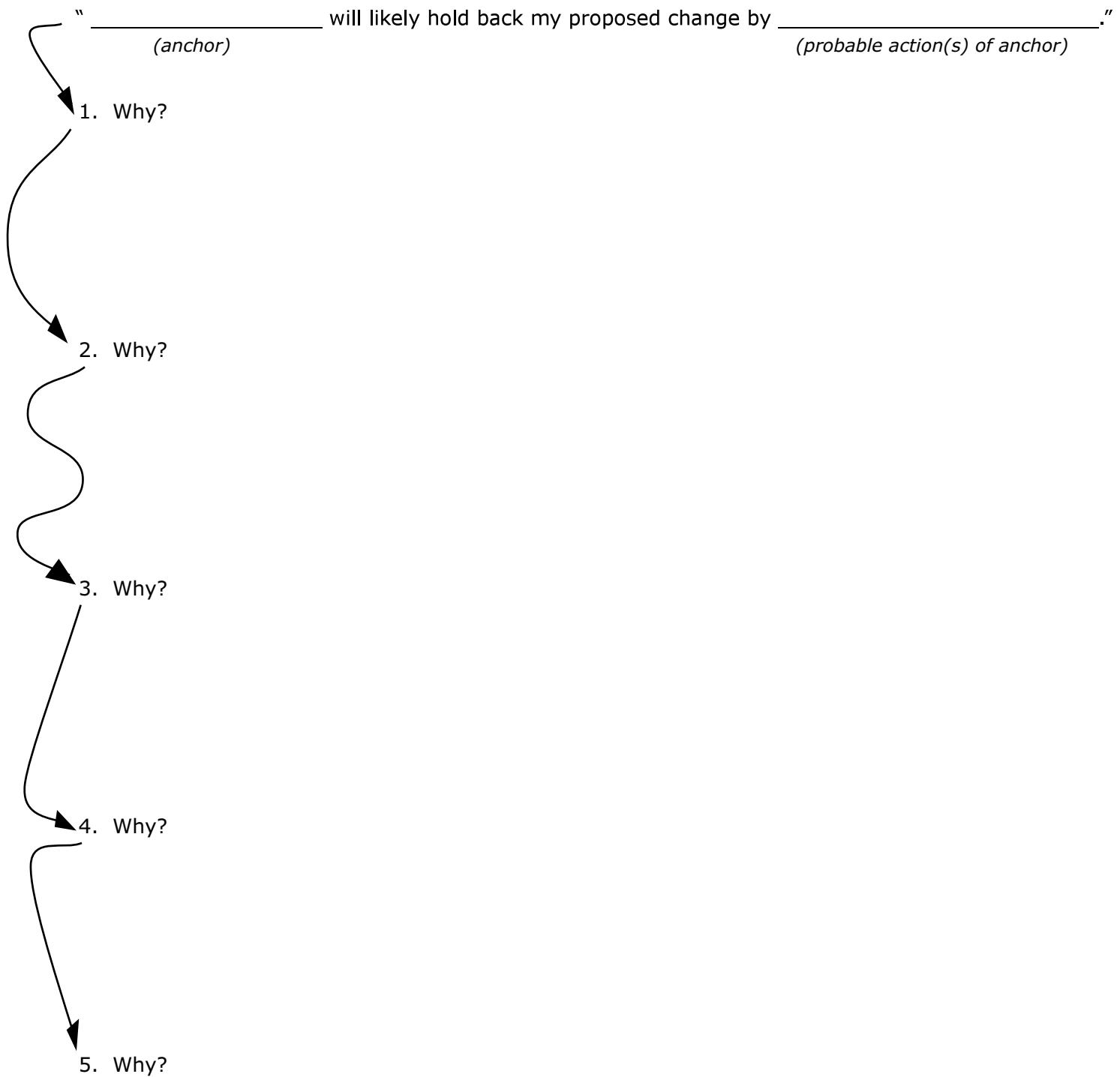
2. Why?

3. Why?

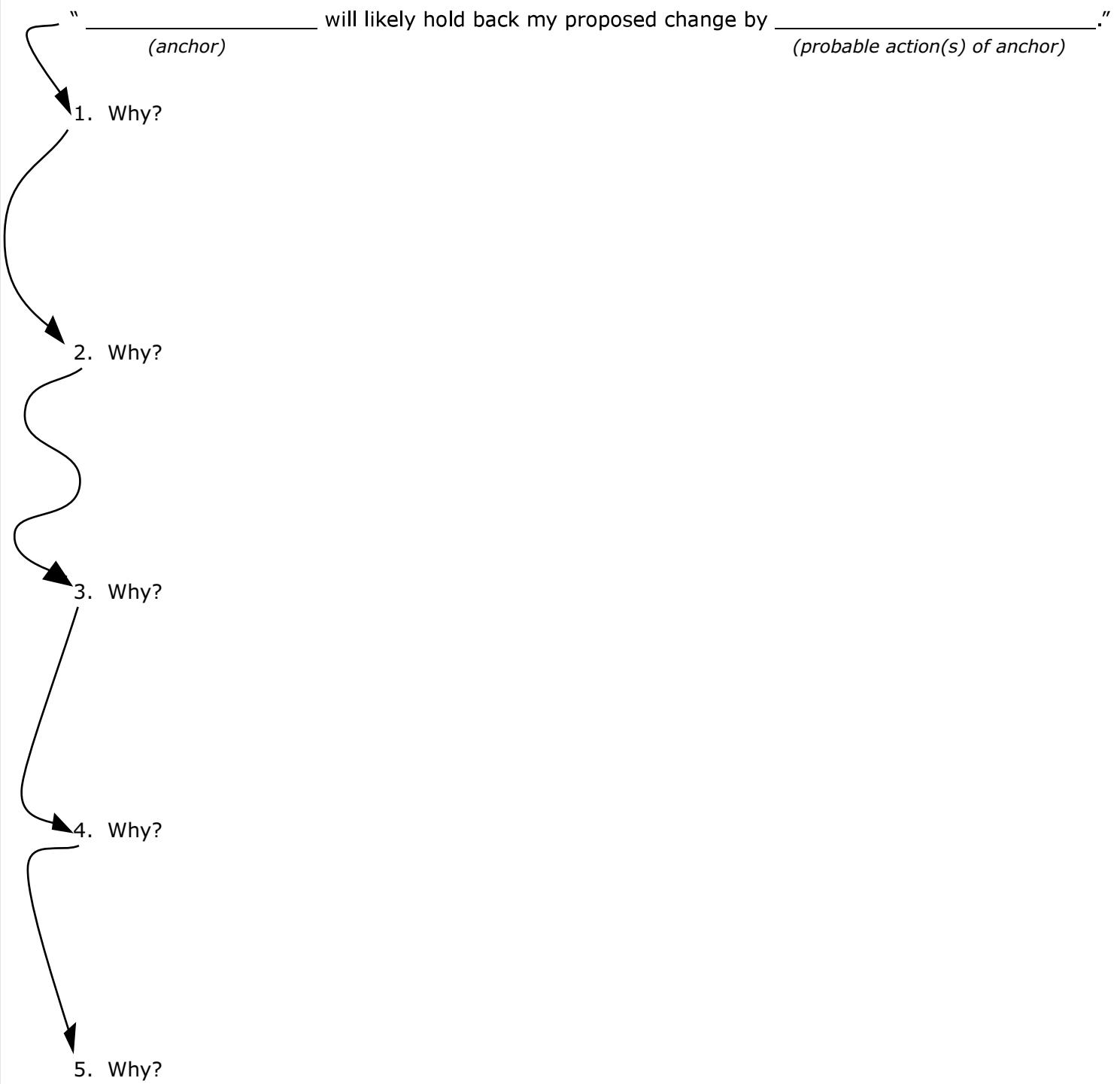
4. Why?

5. Why?

Let's do it again, with another anchor.



Once more.



What are the root causes of your anchors?

What kinds of actions (or potential change projects) would help diminish these root causes?

Turning Anchors into Engines

How might your anchors benefit your change initiative? For example, if you work at a school with many "silos" that don't interact with each other, the lack of collaboration may be an anchor. However, you may be able to undertake a pilot project without the scrutiny of other divisions - providing you some space/safety to try new things and make revisions.

List your main anchors below. For each anchor, describe how it also might be an engine.

Anchors:  **Engines:**

Goals & Action Plan

It's time to pull it all together and make a plan of action.

Fill out a one-year calendar (and a three-year calendar, if appropriate) with items to implement your proposed change, using your action plan packets as a guide. We suggest that your calendars include:

Your academic calendar: breaks, particularly busy time, conferences, etc.

Some time for risk assessment/mitigation planning

Bringing your partners/team on board, time for communication and initial planning

Goals for communicating appropriately with constituencies as needed

Affinity-building activities with your partners/team

Creating and conducting assessment activities (both formative and summative)

Analyzing data from assessment activities and planning any needed changes

Goals related to using your 'engines' - when and how?

Goals related to having the necessary 'difficult conversations' - when and how?

Goals that are Specific, Measurable, Achievable, Realistic and Timely

Specific project planning deadlines and needs (depends on your particular project):

budget approval? external publicity? web site development? internal administrative reports or presentations?

Other items...?