

GETTING SMART ABOUT SYSTEM CHANGE DEVELOPING WHOLE SYSTEM IQ™

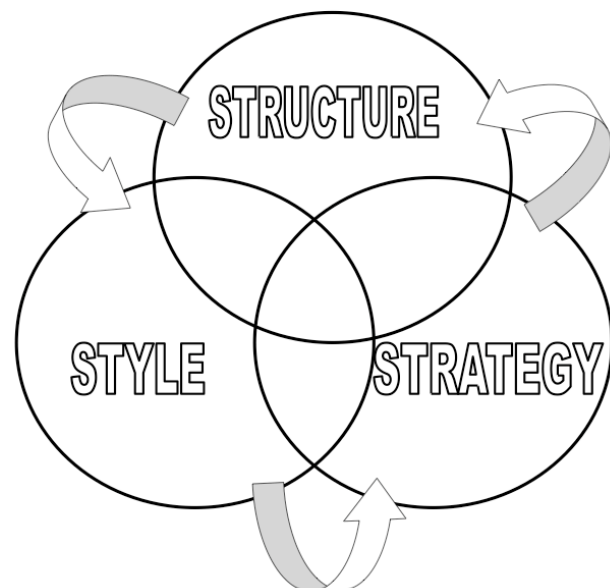
(the new intelligence you need to do whole system change work)

with Sherene Zolno,
ProAction Associates

Business, government and non-profit leaders are saying that, more than ever before, they need to have exceptional skills and creative new approaches to respond to the complex challenges facing their organizations. However, structuring a change process to effect whole system change is a new knowledge area for most of these leaders, and for many of us that consult to them.

Identifying this as *Whole System Intelligence* (WSIQ™), the new intelligence OD coaches and consultants need to have to assess and gather data about their client's whole system, this session will introduce you to a method for ensuring that change interventions are *systemic*.

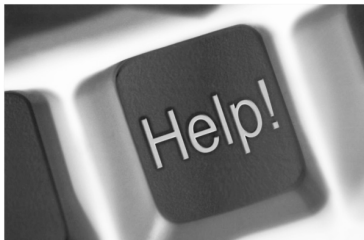
In addition, we will discuss what components should be included in a whole system (large-scale, long-term) change process to ensure that a critical mass for change is achieved – assuring that the change process is *systematic* as well.



Getting Smart about System Change: Developing Whole System IQ™

Some provocative questions for our session today:

1. Why do you need a system model?
2. What's the difference between whole system change and whole system meetings (such as Future Search, AI Summit, and other well-known models),
3. How do I design for whole system change?
4. What is "Field Alignment" and how do I use this idea/model for assessment and intervention planning
5. Can you show me how to apply the model and the template in my own consulting practice? Make it simple, please!



1. Why do you need a system model?

– The Leader's Adaptive Challenge



2. Whole System Events (meetings) vs Whole System Change

A **whole system event** (meeting/gathering) serves as the integrating gathering for an organization going through change. It is a time for envisioning the organization in the future and used to link change initiatives that are underway or needing to begin.

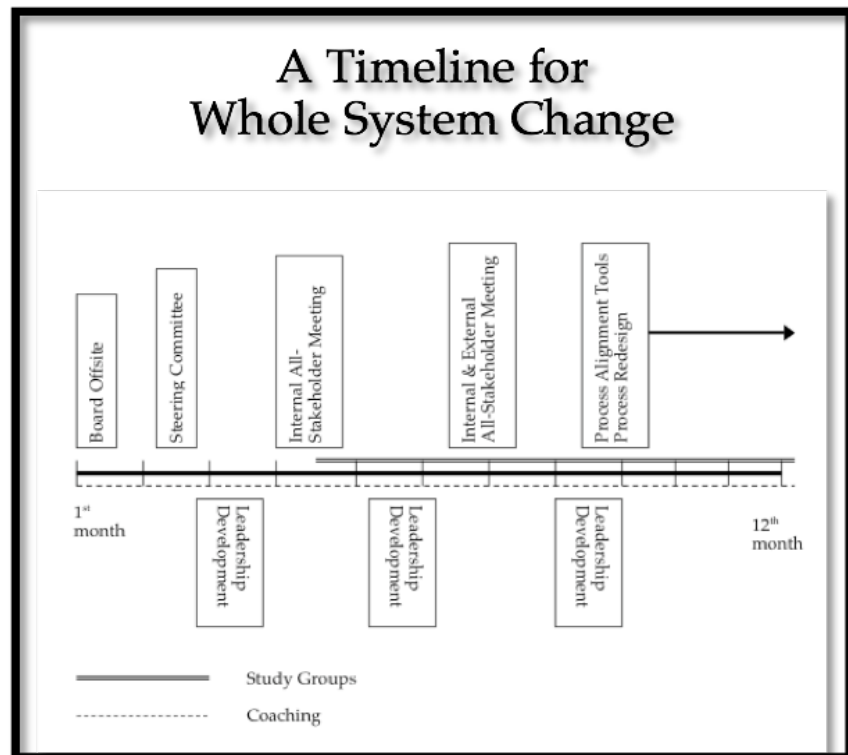
Uses:

- when high levels of participation and cooperation are required.
- to launch an initiative, accelerate culture change or business development or set new levels of productivity.

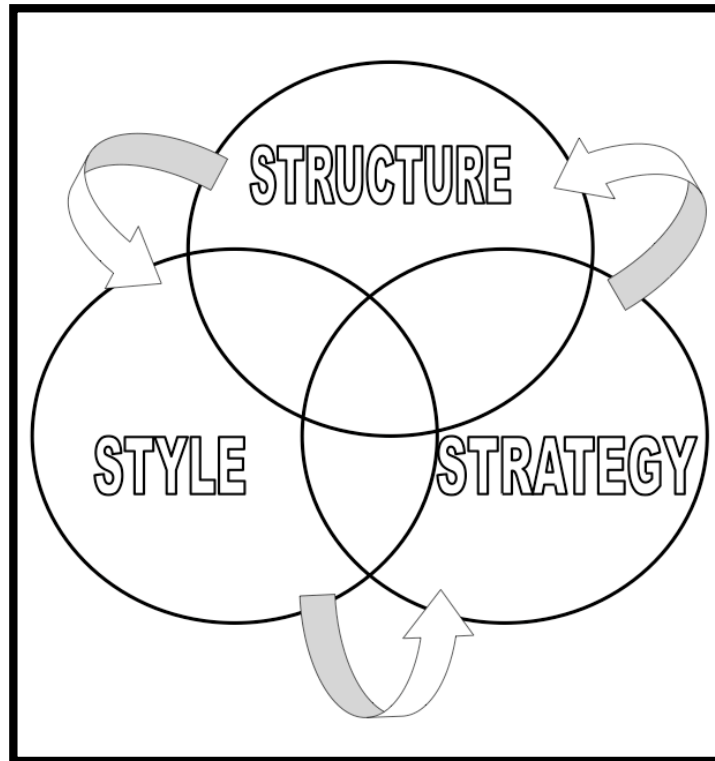
3. Designing for Whole System Change

The best use of a whole system change event is in the context of systemic change, i.e., aligned changes planned to take place throughout the organization.

In this way, the entire planned change process addresses the relationships within the organization system and between it and other systems, with a system of responses intended to bring resources to the organization's current situation.



4. Whole Field Alignment Model¹



Whole Field Alignment is a comprehensive model of organizations that is intended to expand our thinking about how companies can be systemically viewed, improved or changed.

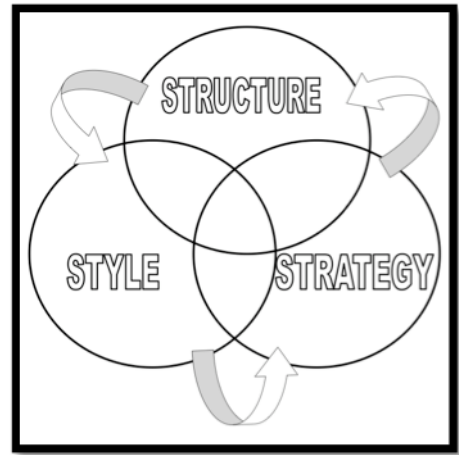
The diagram of the “field”(system), with its three frames (see above), illustrates the interconnectedness of elements that define an organization.

Assessing an organization and coming to understand it fully requires gathering information about the organization in each of these three categories. The goal of this analysis would be to understand the organization as a system with interrelating parts, and, ultimately, design or re-align the system to prepare it to address its adaptive challenges.

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5. Applied: Data Gathering using the Field Alignment Model

In October, Marianne Marks, the new Executive Director of the Good Start Coalition met with two outside consultants, Sharry Burdon and Justin Time, to determine what role they might play in helping her move forward with building her new team. She also hoped to uncover any issues that were holding them back from being successful.



Working with your partner and using the Field Assessment System, sort the information that you have about the Good Start Coalition into one of the three frames: Style, Strategies, Structure

The Good Start Coalition operates fairly autonomously within their local community, mostly operating on local grant funding, but it is part of a larger, state-wide agency.

Some factors affecting them as a result of this relationship include:

- The state-wide agency has come under much scrutiny recently and has received poor evaluations on their operations from physicians, teachers, lawyers and community activists as well as some clients. They do not want any additional negative feedback.
- A new state-wide training program directed to staff is designed to change the agencies' traditional (paternalistic) role to one more client-focused and responsive.
- Recent legislation has affected funding resources. Budget pressure is intense to stretch resources, to "do more with less".
- State-wide, frustration is building among a growing number of middle and senior level managers concerning how information from the central office is shared, the ambiguity of their roles, decisions handed down from above without their input, and a general lack of trust in the state-wide organization's leadership.
- Requests are up, although responding to them is not always timely. Updating records, processing new clients, and other documenting tasks take far more hours than necessary due to bureaucratic structures (approvals, retrieval time, etc.). The job, however, appears to be getting done (i.e., Outputs are acceptable, but at what cost?).
- A statewide affirmative action initiative based on the changing demographics of the state has impacted the local staff selection process. Demographics in the local community, however, haven't changed, resulting in less diversity in their labor pool.

In the initial stages of contracting, it was agreed that the consultants would design and facilitate a session with Marianne and her direct reports to help them identify the most critical issues facing them. Once those issues were articulated, the Consultants would guide Marianne in determining the most appropriate interventions to employ and help her take action. Interviews conducted with members of this team identified some of the following:

While they have a State-wide Mission Statement with local objectives, there is confusion on what the real roles and the emerging roles are for the local organization.

Top management was been repeatedly criticized for providing no clear direction.

They have a strategic plan, but staff are not uniformly aware of, or in agreement with it. They are unclear about what the big picture is or how they should and do fit in.

The Consultants learned that there are at least 8 levels in the local Good Start Coalition:

- Executive Director
- Assistant Director, Administration
- Operations Director
- Senior Supervisor
- Site Supervisor
- Project Team Leader
- Project Assistant
- Receptionist/Clerk

Issues of role clarity, duplication of efforts and inequity of work distribution were raised. Work was distributed by technical specialty but there was no cross-functional teaming up to take advantage of special experience or skills.

The remotely deployed “site” staff are inaccessible (perhaps out of control?).

There is concern regarding how performance is tracked and measured. Some people said that they didn’t know exactly on what they were being evaluated.

Lack of technical support was mentioned: there is no automated mechanism to identify the status of requests, or forecast people hours to complete assignments, for example.

Managers expressed great dissatisfaction with the style of leadership of the ED.

Many staff felt their managers were unresponsive and aloof. Some said that they were left out of the information loop – ignored.

Many staff members thought that they received little feedback or acknowledgment of their efforts and felt they had little or no impact on decision making, either operational or strategic.

There was also some evidence of resentment concerning the perceived preferential status of some staff members.

About Sherene Zolno

Sherene Zolno, RODC, executive director of The Leading Clinic, and lead consultant with ProAction Associates, is a researcher, educator, coach and consultant with an international reputation for excellence in working with leadership teams to ready them for the future, and assisting organizations in identifying strategic intentions, improving operations and transforming culture. Her research-based Model for a Healthy World™ executive leadership program and Timeline for Tomorrow whole system change process are the foundation for sustainable, large scale change in several major organizations.

Ms. Zolno served on ASTD's OD Professional Practice Area board. Her writing has been published in ASTD's Research Monograph and OD Network's OD Practitioner and VisionAction Journals, in Jossey-Bass/Pfeiffer's 2000, 2002, 2008 and 2009 Annuals, and in Kouzes and Posner's The Leadership Challenge Activities Book, as well as in numerous other professional publications.

You can read more about her work at <http://www.proactionassociates.com> and reach her at: szolno@comcast.net

