

The Wheel of Change in Action

How would we use the Wheel of Change and a transformative approach to help plan a major organizational change initiative?²³ Let's look at an example.

Transforming a board

The relatively new ED of organization XYZ has inherited an ineffectual board. Engagement of individual board members is erratic. A frustrated staff usually ignores the board until just before meetings, when they rush to prepare a last-minute agenda and long reports for the board. Unclear about its role, the board fluctuates from being absent to sporadic bursts of inappropriate interference with staff functions. The board chair is well-intentioned but is working with time constraints and doesn't have a sense of how to intervene effectively. The ED wants to fix these problems but doesn't know where to start.

Undisciplined, ineffective, or interfering boards are an all-too-common source of distress to executive directors, staff, and board members. Let's do an initial scan of ways to affect such a transformation, using the lens of the Wheel of Change.

TRANSFORMING A BOARD:

Examples of work in Hearts & Minds

In order to create a fundamental and sustainable change, here are some possible things we might do to impact how the staff and board think and feel:

- ▶ reconnect board members to their deeper purpose for serving
- ▶ work to ensure alignment around the organizational mission, not just among staff but across the board

- ▶ learn together about the role and responsibilities of effective boards and their chairs
- ▶ have honest, authentic conversations within the board about what's working and not working
- ▶ develop a shared picture of what a high-performing board/staff partnership looks like and what it takes to create it
- ▶ help the board clarify its role, focusing both on organizational needs and meeting board members' desires to make a meaningful contribution
- ▶ support a clear leadership role for the board chair and effective working relationship between the chair and ED
- ▶ surface and address any beliefs and expectations, held individually or collectively, that may be in the way of a successful board/staff partnership and the board's exercise of its responsibilities
- ▶ explore with each board member their commitment, aspirations, needs, and barriers to engagement
- ▶ surface and resolve interpersonal and philosophical differences among individual board members

TRANSFORMING A BOARD:

Examples of work in Behavior

People will not only have to think and feel differently—their behavior needs to change. Here are some possible ways to help create the needed shifts in habits:

- ▶ establish clear expectations and ground rules for board members' behavior with each other and with staff, both in and out of board meetings
- ▶ ED and board chair set priority agendas for board meetings with clear purpose, outcomes, and processes

²³ See our tool the *Wheel of Change Planning Template*, and other assessment tools by visiting <http://www.stproject.org/resources/tools-for-transformation/assessment-for-organizational-transformation/>

- ▶ create opportunities for meaningful and generative exchanges between board and staff at board meetings
- ▶ Board and staff evaluate each meeting to assess learning and progress
- ▶ ED and board chair establish a strong working partnership and ongoing authentic dialogue to support it
- ▶ training for board members in communication and teamwork skills
- ▶ cultivate directness and accountability among board members and between board and staff
- ▶ facilitate board members' self-assessment of how well they fulfill their board responsibilities
- ▶ set clear expectations regarding board members' donations to the organization
- ▶ exit any board members who are not willing or able to operate effectively in the emerging new paradigm
- ▶ establish term limits for board members to allow for a good balance of continuity and fresh perspectives
- ▶ establish explicit criteria to shape board composition and guide the nominations and election process
- ▶ assess and revamp board committee structure to reflect the real needs and capacity of the organization, board, and staff
- ▶ review and update bylaws
- ▶ clarify respective decision-making authority of board and management
- ▶ develop clear roles, processes, and deadlines for long term and annual strategizing, planning, and budgeting
- ▶ develop process for concise and meaningful staff reports to board that support board's fiduciary responsibilities and monitoring of organizational performance
- ▶ establish annual performance evaluation process of the ED by the board
- ▶ explore new methods for communicating with the board both between and in preparation for meetings

TRANSFORMING A BOARD:

Examples of work in Structure

What changes are needed in structures and processes to complete the transformation? Here are some possible levers of change:

- ▶ assess the board's understanding and alignment with existing organizational goals and strategies
- ▶ develop a written "job description" for board members
- ▶ create written individual agreements with each board member that confirm commitments such as attendance, committee participation, and sharing of expertise

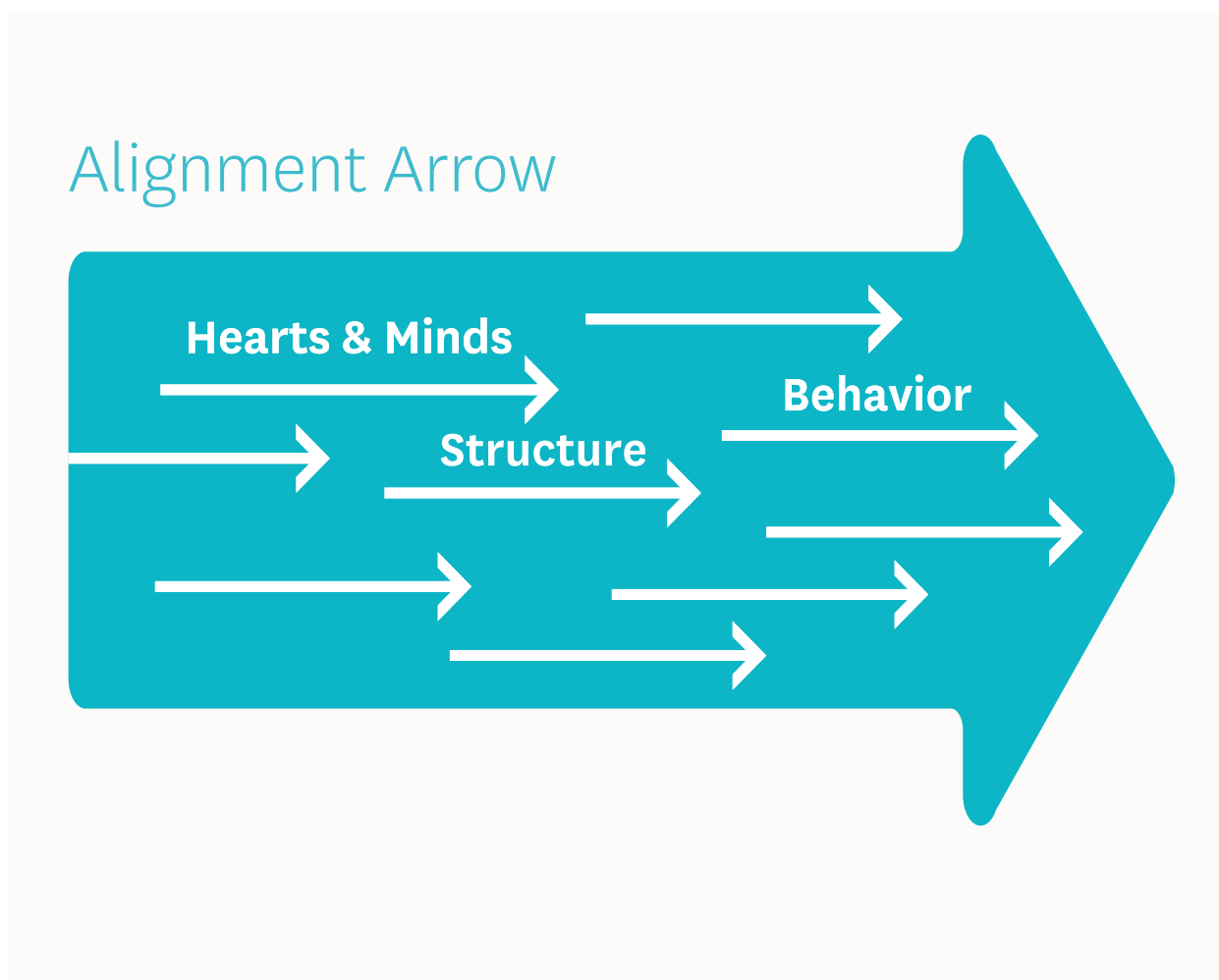
While no one change process would likely implement all of these suggestions, looking at organizational change through the lenses of the three domains of the Wheel of Change helps ensure a systemic, transformative approach to change.

A Key Ingredient: Alignment

You may have noticed the word “alignment” appearing a number of times throughout this paper. Alignment is defined as “the proper adjustment of the components of an electronic circuit, machine, etc., for coordinated functioning,” or “a state of agreement or cooperation among persons.”²⁴

Alignment is a fundamental transformative principle. In organizational transformation, we want everyone and everything moving in the same direction, all pulling together towards a common goal. We can represent this with a model called the Alignment Arrow. (fig. 1)

We often find that while some elements of an organizational system are in alignment with where the organization says it wants to go, others are not.



(fig. 1)

²⁴ <http://www.dictionary.reference.com>

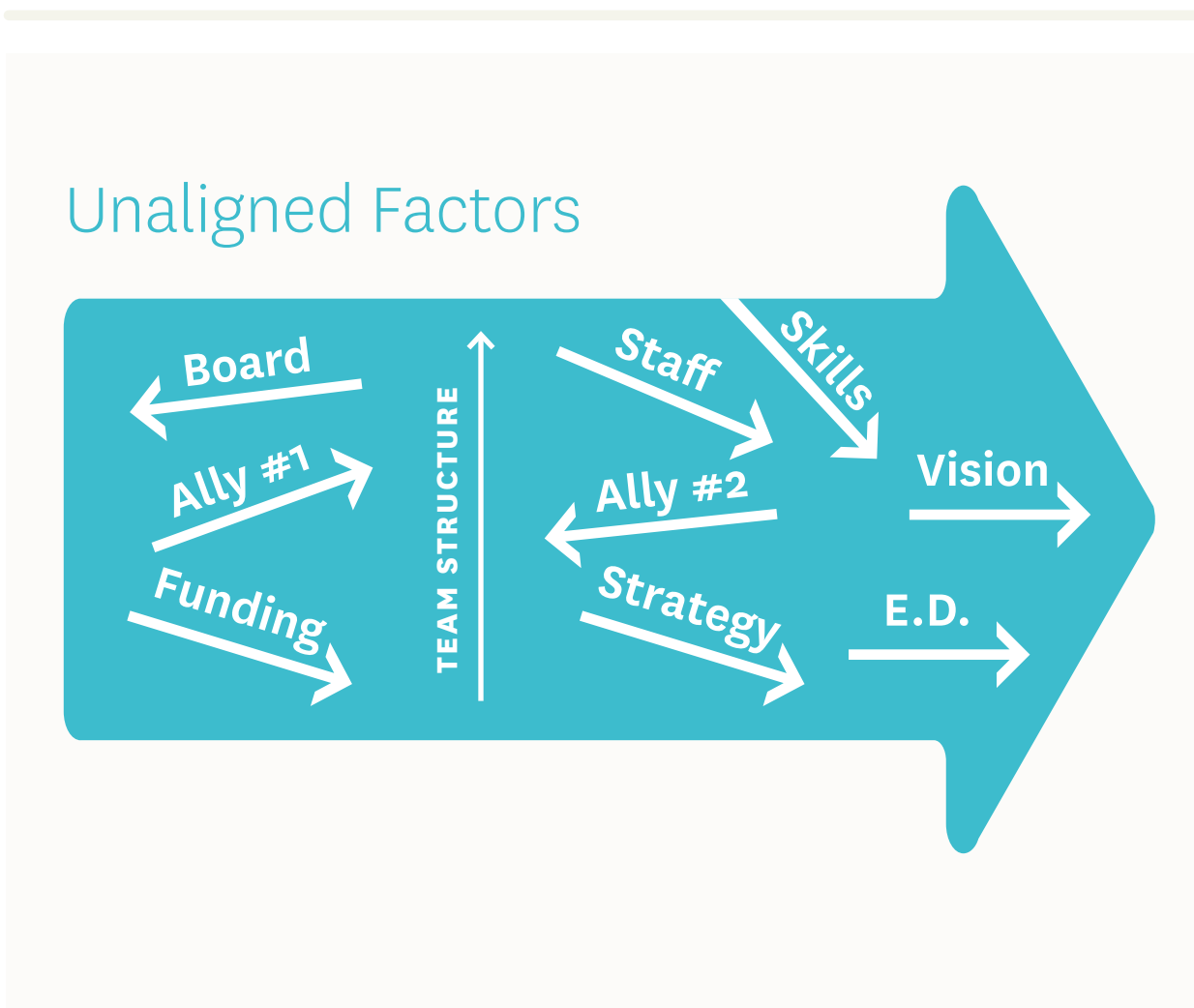
Imagine an advocacy organization that is preparing to launch a new campaign. Certain factors are aligned, primed and ready to implement:

- ▶ a clear vision of success
- ▶ a good strategy
- ▶ the ED owns the vision and strategy
- ▶ staff are on board and enthusiastic
- ▶ funding is in place
- ▶ a critical ally has committed to join forces

However, other factors are not aligned:

- ▶ Some key board members are skeptical of the new direction.
- ▶ The current structure of the campaign teams isn't the best platform for implementing the new strategy.
- ▶ Another very critical ally remains unconvinced, and may choose not to collaborate.
- ▶ The new campaign has some elements that are outside the team's experience base. It's likely that some new skills will be needed.

In the Alignment Arrow model we represent the situation like this: (fig. 2)



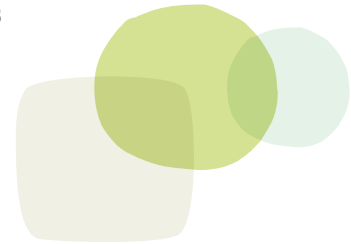
(fig. 2)

Think of each element of any organizational system as having potential energy to add to the collective power of the whole. Like individual streams joining to form a mighty river, we want all organizational energy aligned so that the full power of the organization is unleashed to fulfill its mission.

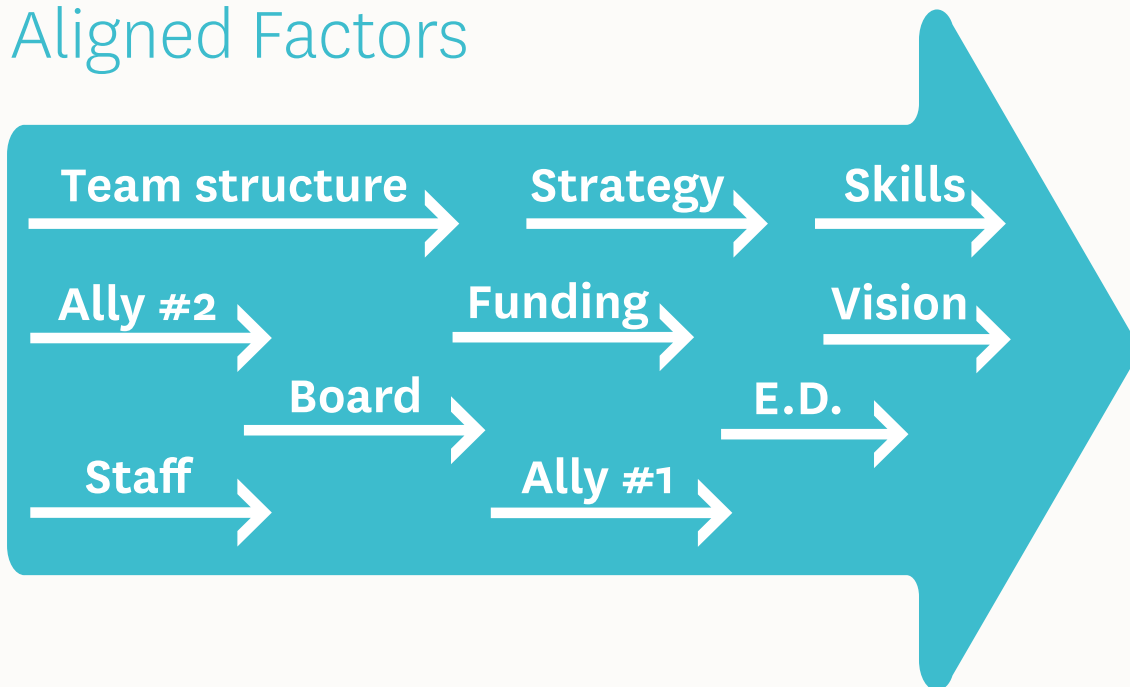
One of the fundamental tasks in organizational transformation is to get all the arrows moving in the direction of agreed-upon goals. (fig. 3)

*A thousand spider webs
linked together can
catch and hold
the king of beasts.*

YORUBA PROVERB



Aligned Factors



(fig. 3)