

CHANGE ON THE INSIDE CHANGE IN THE ORGANIZATION

Two practical models that work

Oregon ODN
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MEET YOUR PRESENTERS



Judith Sugg, MBA, PhD

Judith combines her training and experience in business and psychology for her work as a coach, trainer, and consultant. She is skilled at helping individuals and organization clarify their vision, improve their interactions, and understand conflict. She has taught mindfulness and psychology for 25 years, and brings these skills to her trainings with healthcare organizations, nonprofits, government, and technology.

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Stephanie Fleming, Viri Group

Stephanie's passion is guiding organizations and teams through challenging situations and change. From over 20 years of leadership experience with Fortune 500 companies, startups, and nonprofits, she believes team dynamics is the biggest contributor to strategy success and failure; therefore, as a consultant, she integrates teaming and psychological safety into her approach to create impactful and sustainable results. Her mission is to change the world, one team at a time!

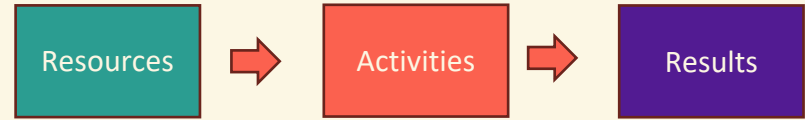
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FRAMEWORK 1: THE LOGIC MODEL

LOGIC MODEL

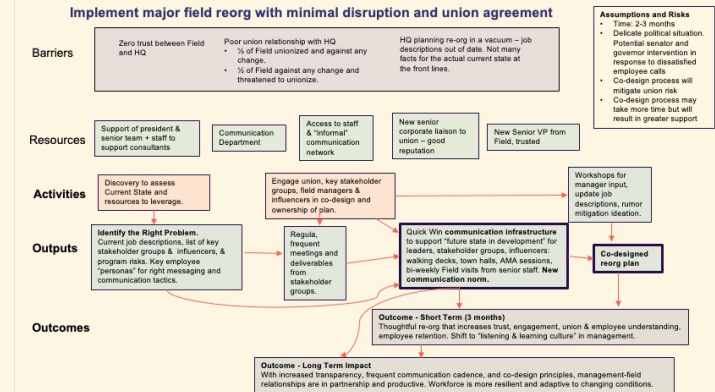
A systematic and visual representation of the group's *shared understanding* of the relationships among:

- **Resources** you have to operate your program
- **Activities** you plan
- **Results** the program is expected to achieve

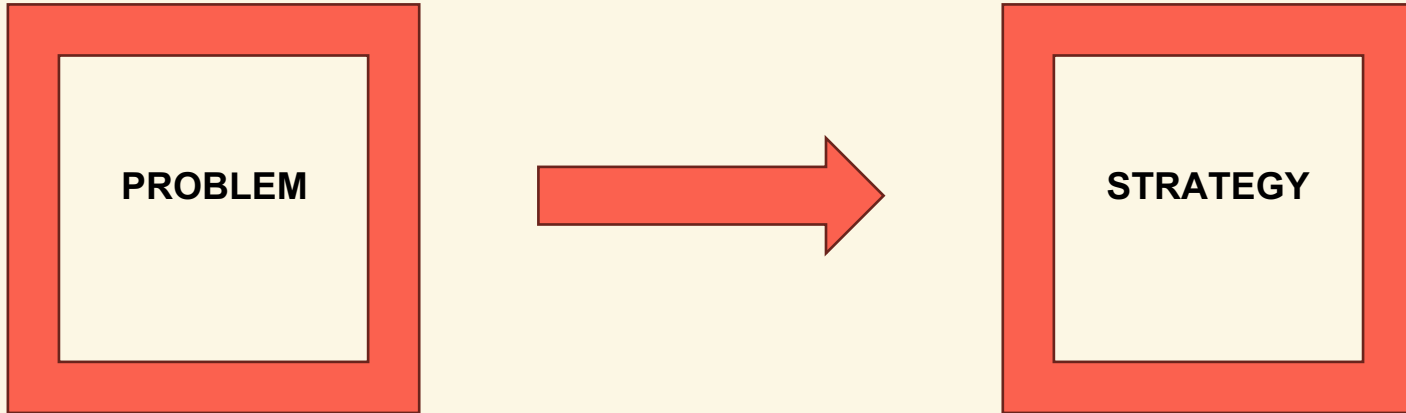


A road map of how you expect your initiative to work.

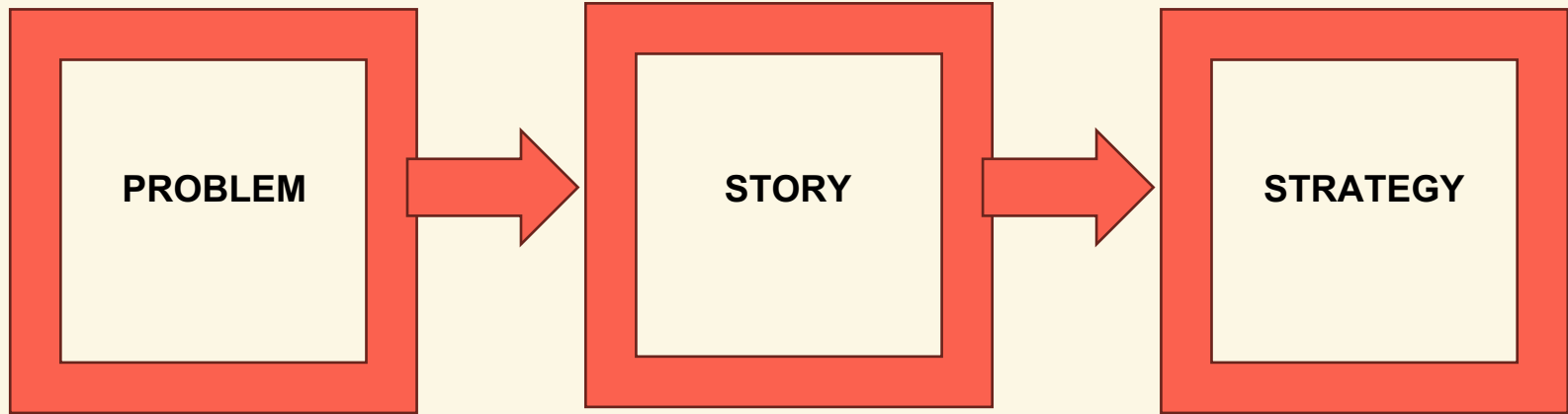
Makes visible the connections between different slices of the same program.



TYPICAL STRATEGY DEVELOPMENT

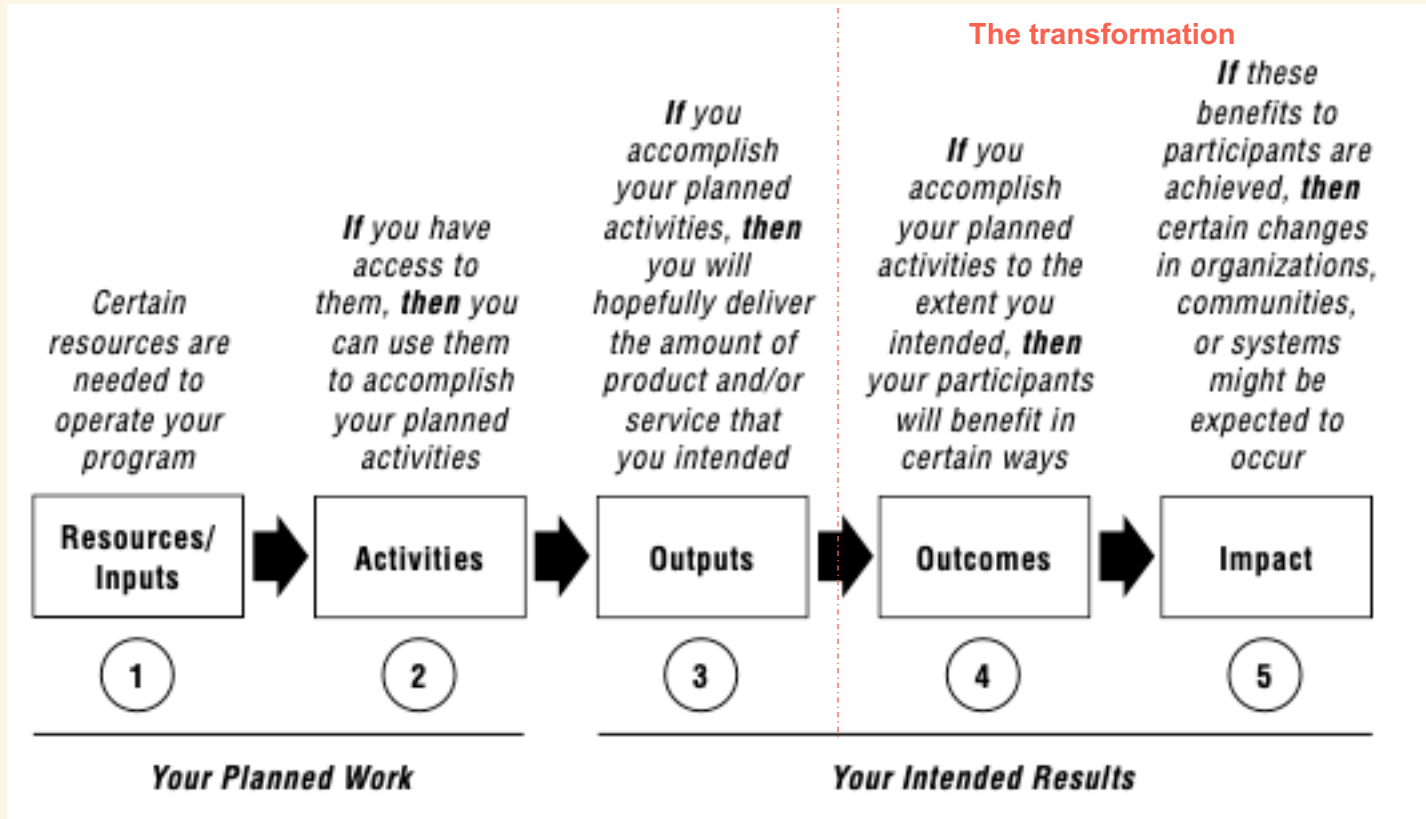


BUT WHAT IF THAT DOESN'T WORK?



LOGIC MODEL

IF WE DO "X", THEN "Y" WILL HAPPEN



Desired Outcome: Field reorganization that did not antagonize the union and supported by front line management.

Barriers

Zero trust between front line workers and HQ

Poor union-HQ relationship

- ½ of front line workers unionized and against any change.
- ½ of front line workers against any change and threaten to unionize.

Lack of data and “current state” definition. We don’t know what we don’t know.

Assumptions and Risks

- Time: 2-3 months
- Delicate political situation.
- Co-design process will mitigate union risk
- Co-design process may take more time but will result in greater support

Resources

Support of president & senior team + staff to support consultants

Communication Department

Access to staff & “Informal” communication network

New senior corporate liaison to union – good reputation

New Senior VP from Field, trusted

Activities

Discovery to assess Current State and resources to leverage.

Engage union, key stakeholder groups, field managers & influencers in co-design and ownership of plan.

Workshops for manager input, update job descriptions, rumor mitigation ideation.

Outputs

Current State & Right Problem ID'd.
Current job descriptions, list of key stakeholder groups & influencers, & program risks. Key employee “personas” for right messaging and communication tactics.

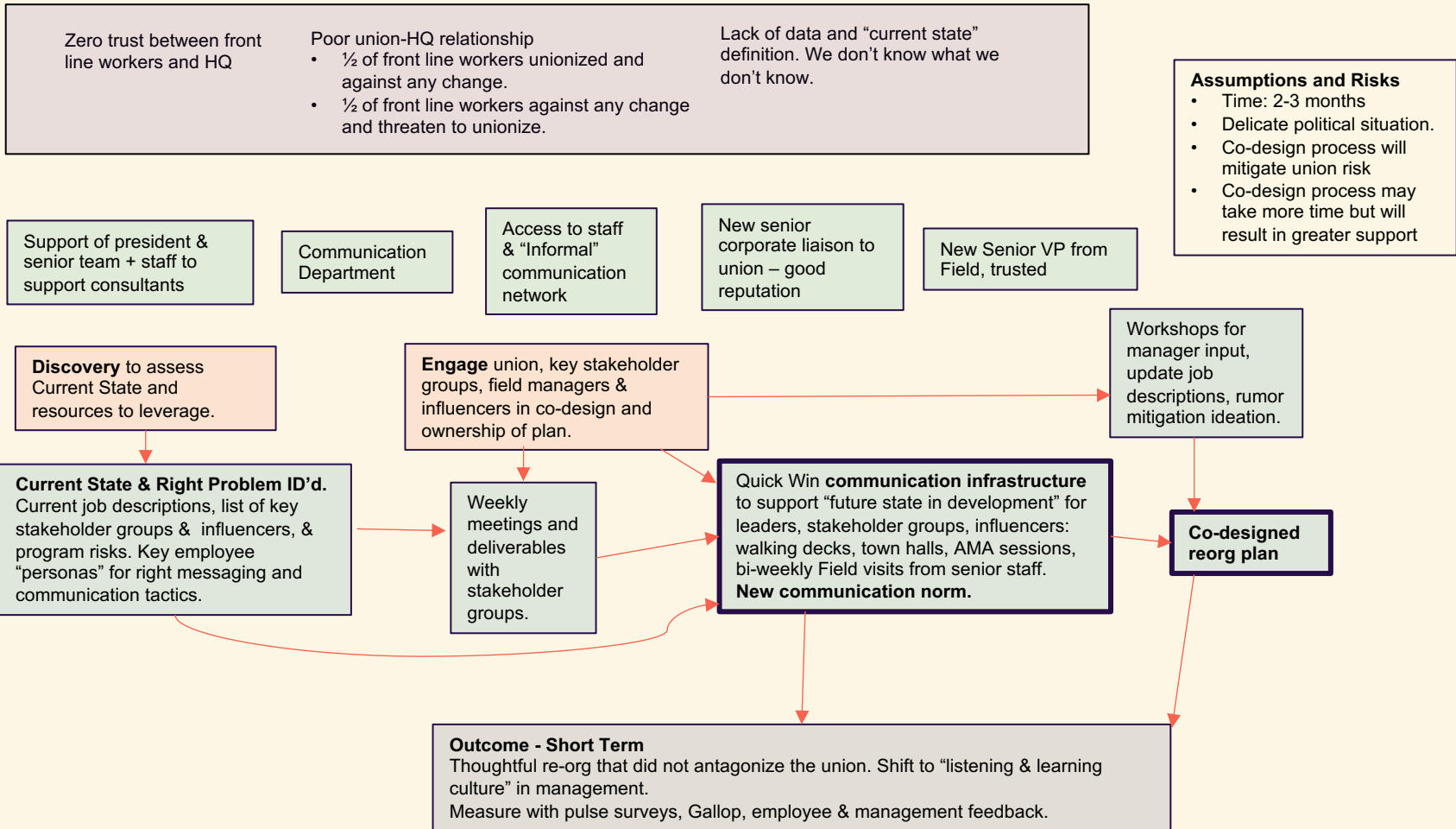
Weekly meetings and deliverables with stakeholder groups.

Quick Win communication infrastructure to support “future state in development” for leaders, stakeholder groups, influencers: walking decks, town halls, AMA sessions, bi-weekly Field visits from senior staff.
New communication norm.

Co-designed reorg plan

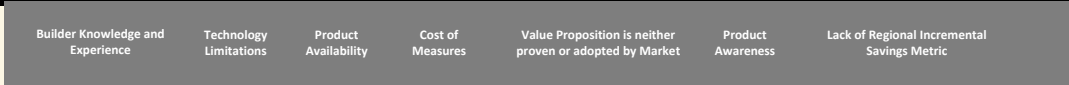
Outcomes

Outcome - Short Term
Thoughtful re-org that did not antagonize the union. Shift to “listening & learning culture” in management.
Measure with pulse surveys, Gallop, employee & management feedback.



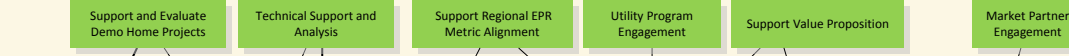
Next Step Homes - LOGIC MODEL

Barriers



Next Step Home Product Definition:
New site built single family home built to the NSH spec. The spec is based on a whole building approach with the best blend of efficiency technologies and practices such that reduces cost, increases build-ability, human comfort, air quality and new home industry profitability

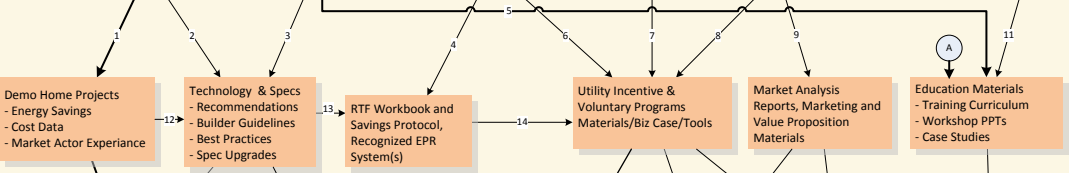
Activities



Opportunities

1. 3 year Code Cycle and Code Goals
2. Emergence of Market Facing Performance Tools
3. Builder Interest in getting ahead of competition and code advancements

Outputs

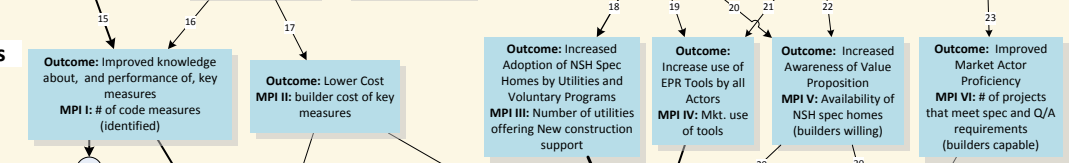


Leveraged Regional Efficient Homes Infrastructure:

1. Utility New Construction Programs
2. Efficient Home Appraisal
3. Residential Code Process
4. Training Organizations
5. Builder and Utility Marketing
6. Mfrs Product Development
7. Market Facing Performance Tools and above code standards (EA, LEED, ESTAR, Passive House)

MT Outcomes

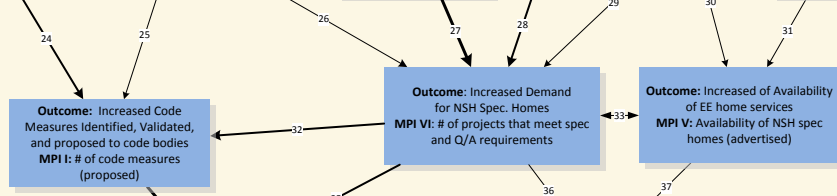
Shallow



Key Assumptions:

1. Small market share (<10%) is sufficient for a technology to be adoptable by code if it is cost effective
2. RTF will approve a market facing savings metric tool that will calculate above and below spec savings on a home by home basis
3. Periodic comprehensive validation studies can be the basis of increased valuation of homes built with NSH features and specs

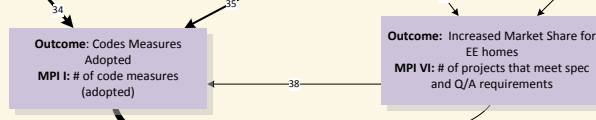
Medium



Increase Value for all Market Actors

1. Builders & Subcontractors
2. Homebuyers
3. Realtors
4. Utilities
5. Raters/Verifiers & Providers
6. Voluntary Programs
7. Appraisers
8. Others

Deep



End State



Commercial Real Estate Initiative



Making energy efficiency a measurable asset in commercial office real estate through adoption of Strategic Energy Management practices

MARKET BARRIERS

- Insufficient knowledge of business case for energy efficiency by owners, developers & managers
- Lack of owner- and tenant-side tools, knowledge and practices to finance and manage energy-efficient commercial office buildings and portfolios
- Insufficient whole building energy data to manage sustained energy performance
- Inadequate supply of skilled commercial office building operators and engineers practicing Strategic Energy Management

INTERVENTIONS

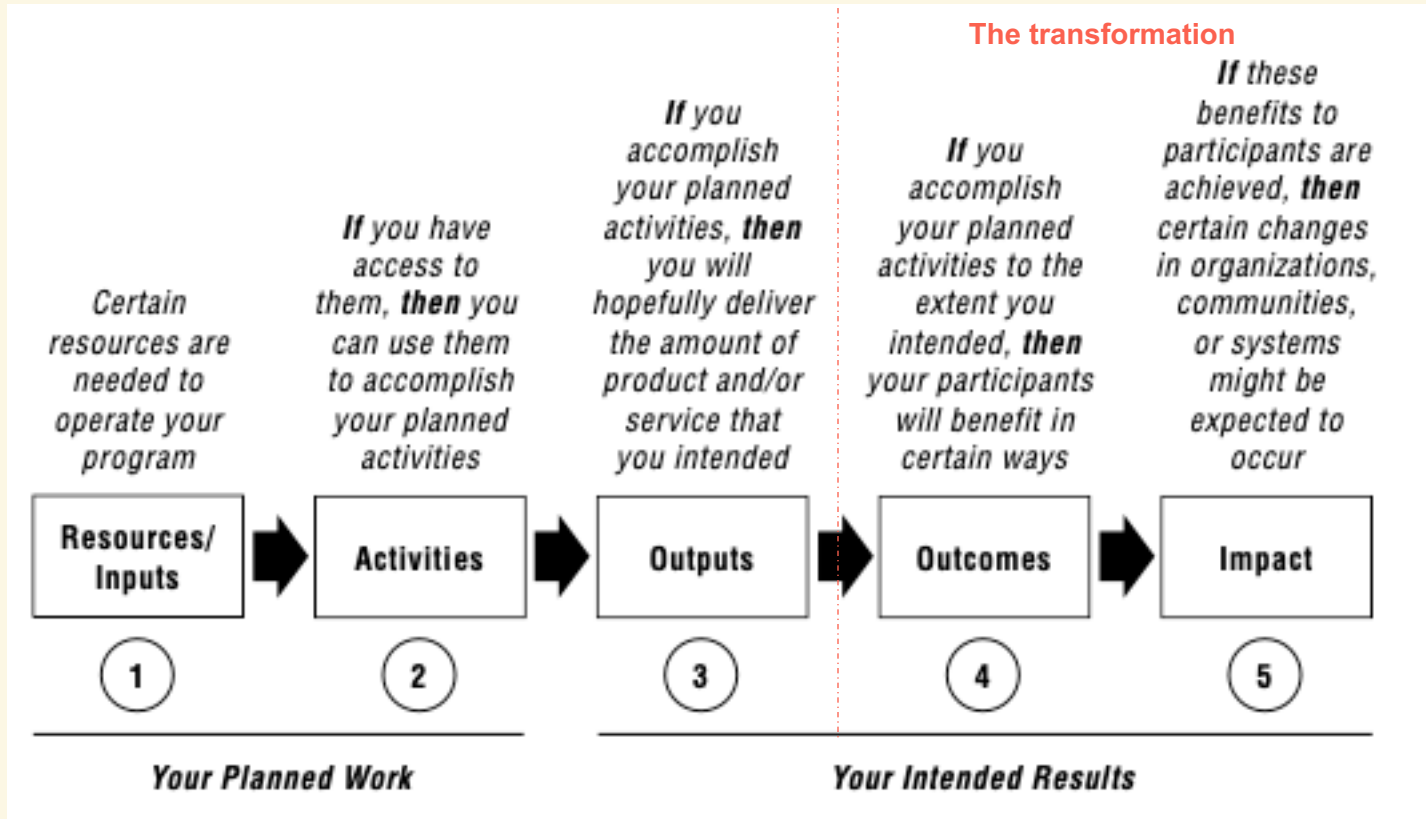
- Market Partner Program: Accelerate adoption of Strategic Energy Management by leading real estate firms by demonstrating the cost-savings, value-creation and competitive advantage of SEM
- Kilowatt Crackdown: Engage broader commercial office market in competitions that advance regional diffusion of Strategic Energy Management practices
- Education and Training: Build market supply of skilled operators and engineers through knowledge-transfer programs
- Grow financial industry practices to quantify energy efficiency through knowledge transfer programs

OUTCOMES

- A majority of building owners and managers in commercial office real estate practice Strategic Energy Management for competitive advantage, decreasing costs and increasing portfolio value
- A majority of building operations and engineering professionals actively practice Strategic Energy Management, resulting in more profitable buildings
- Region's utilities and market actors offer Strategic Energy Management resources for commercial real estate industry

LOGIC MODEL

IF WE DO "X", THEN "Y" WILL HAPPEN



LET'S PROCESS

1 minute on your own

- Think of an organizational intervention that went wrong or didn't result in the desired outcome.
- What was missing that a logic model approach could have surfaced?
 - Missing or wrong stories/perspectives?
 - Components: Resources, Activities, Outputs, Outcomes, Impact

10 minute breakout group discussion

- Meet each other!
- Share your organization mishap.
- Any patterns?
- Any additional insights?

EXTRAS

RESOURCES

- The O.G. guide to Logic Models: <https://wkkf.issuelab.org/resource/logic-model-development-guide.html>
- Online Logic Model course from University of Wisconsin-Madison: <https://logicmodel.extension.wisc.edu/>
- Complete Logic Model Workshop Toolkit from the Institute of Education Sciences, US Dept of Education: https://ies.ed.gov/ncee/edlabs/regions/northeast/pdf/rel_2015057.pdf
- *Mind Your Mindset* by Michael Hyatt & Megan Hyatt Miller. Combines changing your mindset to develop better strategies. Similarities to the Logic Model approach.

WHEN TO USE A LOGIC MODEL

- When the primary goal is to achieve a specific desired change or outcome, rather than solely focusing on financial or operational targets.
- When there are multiple stakeholders involved and you need a shared understanding.
- When the change initiative involves complex, multi-component activities and outcomes.
- When uncertainty is high.
- When you need to surface and test the underlying assumptions behind your strategy.
- When continuous monitoring, learning and adaptation is critical.

BENEFITS OF A LOGIC MODEL

- More collaborative and inclusive - facilitates stakeholder involvement and buy-in by creating a shared understanding of the program or change.
- Aids in strategic planning by explicitly linking investments to intended results.
- Helps identify, test, and clarify assumptions about how change happens.
- Provides a comprehensive view by focusing on both implementation and outcomes from the start.
- Flexibility to modify components as circumstances change.
- Facilitates monitoring and evaluation by mapping expected results.

LOGIC MODELS VS TRADITIONAL PLANNING

- Traditional corporate planning approaches often focus on financial metrics, market analyses, and operational efficiencies.
- Logic models are particularly useful when planning and implementing programs or initiatives that aim to achieve specific outcomes or changes within an organization or community.
- Logic models should be used when the desired outcomes are more qualitative or impact-oriented, such as improving organizational culture, enhancing employee engagement, or driving strategic organizational change.

Logic Model Worksheet

IES, US Dept. of Education

Barriers/Risks

Problem statement: _____

Resources	Strategies and activities	Outputs	Short-term outcomes	Long term outcomes	Impacts
What resources are or could reasonably be available?	What will the activities, events, and such be?	What are the initial products of these activities?	What changes are expected in the short term?	What changes do you want to occur after the initial outcomes?	What are the anticipated changes over the long haul?
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Assumptions: _____



**FRAMEWORK 2:
THE OUTCOME FRAME**

Outcome Frame

Coaching Questions for Exploring Systematically What is Wanted

A little history.....

Humanistic Psychology (1950s)

Solution Focused Therapy (1970s)

Appreciative Inquiry (1987)

Positive Psychology (1998)

All this systems thinking stuff has no meaning without understanding that we're part of something larger than ourselves. Peter Senge

The Blame Frame

Pick a problem

Notice your internal responses

What's wrong?

How long has it been going on?

Whose fault is it?

What's the worst example of this?

Crafting the “want”

1. What is it that you want?

Positive statement

You have responsibility/control over it

Right size/specificity

I want people to listen to me
at work

2. What does that do for you?

The underlying reason; core value

Eventually core values

Make an impact

So if you are able to do that...

What is it that you want?

Be who I really am

3. When, where, with whom? (Specifics)

4. How will you know when you have achieved the goal?

Evidence – what you can see, hear, feel

The outcome as part of the client's system....

5. When you achieve what you want, what else in your life will improve?
6. What stops you from already having this?
7. What happens if you don't achieve this?
8. Does any part of you object to achieving this? (Go inside, what objections arise?)
9. What's at risk when you achieve this outcome? (Relationships, security, time, etc.)

Getting Started....

10. What resources do you already have to help? (Info, people, funding, attitude, etc)

11. What's your first step?

12. Imagine: Into the future; look back; what had to happen?

Your turn!

- Groups of 2-3
- Go through Questions 1, 2, 4
- Switch, or continue with one person to do more
- Make sure it is something you really want