

Thumb Rules for Change Facilitators

(Herb Shepard-1974/edited Medina 2014)

Rule 1: Stay alive– Maintain your personal balance (head, heart and health).

- Staying alive means knowing your core beliefs and values.
- Staying alive means loving yourself...staying in touch with your purpose.
- It means using your skills, your emotions, your labels and positions, rather than being used by them.
- It means not being trapped in other people's games.
- It means turning yourself on and off, rather than being dependent upon the situation.
- It means choosing with a view to the consequences as well as the impulse.
- It means going with the flow even while swimming against it.
- It means seeing dilemmas as opportunities for creativity.
- It means greeting absurdity with laughter while trying to unscramble it.
- It means capturing the in moment in the light of the future.
- It means seeing the environment through the eyes of your purpose", belief and values.

Rule 2: Start where the system is.

- Start where the client is. Understand how the client sees themselves, their situation. Learn about, know and understand the culture of the system.
- Remember that sometimes "where the client is", is wondering "where the consultant is".
- It is important to understand this work as organic rather than mechanistic. Build strength and build upon it.

Rule 3: Never work uphill.

- Don't build hills as you go.
- Work in the most promising arena for building success.

- Don't use one when two could do it. (use small groups and teams).
- Don't over organize. Remember ready, fire, aim (Fullan)
- Don't argue if you can't win.
- Play God a little. If there is a moral obligation, remember you ethics, personal core.

Rule 4: Innovation calls for a good idea, initiative, understanding change and transition and a few friends.

- Using your "scanner" to find people who are ready willing and able to work, link them to one another and work with them (teams).
- Identify and grow an internal talent pool.
- Work on building individual's personal senses of responsibility (ownership in the issue)
- Take time to assess the knowledge, skills and talents that people bring to the table. Use your instincts/observation. Sometimes written responses work.
- Build on talents and strengths.

Rule 5: Load for success

- Work for early small successes.
- Focus on incremental progress.
- Celebrate success.
- Try new behaviors, new experiences to succeed.

Rule 6: Light lots of fires.

- Remember, large "monolithic change" efforts have high visibility and other qualities of a good target, but it also tends to prevent subsystems from developing ownership of or commitment to the work.
- Additionally, remember that focusing work in one subsystem is a determinant to "systemic" change. The subsystem will experience tremendous pressures to move back to its previous level of performance and security of succeed.
- Understand what default behaviors are.

- In systemic change efforts, subsystems tend to see safety in their comfort zones. This is exhibited by default behaviors in challenging time (challenges to try new practices).
- Encourage, model and tryout new behaviors.
- Light lots of subsystem fires and link them up. If many interdependent subsystems are stimulated, and the consultant can bring them together to facilitate one another's efforts, the entire system begins to move.

Rule 7: Keep an optimistic outlook---don't let the buggers get you down.

- The glass is half full rather than half empty.

Example. People have a great capacity for joy as well as for resentment, but resentment causes them to overlook opportunities for joy. In a workshop where a married couple was discussing their "sexual problem" and how they were working on it, it became clear that it would never be solved simply because sex is not a problem but an opportunity.

-Good mantra: **We are not "problem solving" but rather creating opportunity. We are not fixing the past but rather creating the future.**

Rule 8: Capture the moment. Take action with opportunity.

- One captures the moment when everything one has learned is readily available, and when one is in touch with the events of the moment.
- Watch the behaviors and environment and look for opportunities to catch good stuff. Catch them doing it "right".
- Being wrong is irrelevant in creating our future. We just learn how to do the "right stuff" better.