

Presenter's Guide

People to People:
the human side of implementation



Acknowledgements

The IDEA Partnership extends appreciation to, and acknowledges the contributions of, 33 cross-stakeholders representing

- Teachers,
- General Education Administrators,
- Special Education Administrators,
- Specialized Instructional Support Providers,
- Families,
- Higher Education,
- Technical Assistance Providers, and
- Policymakers

from 13 states across the country, in the creation of this presentation.

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Purpose of this guide:

This presenter's guide is intended to support the PowerPoint slides by offering

- Suggested background readings;
- Talking points relative to each slide;
- Suggested activities to enhance learning opportunities for participants;
- Tips to facilitate the professional growth experience; and
- Suggested readings for extension of learning.

About the format:

There are three distinct sections of this document, "Preparation", "Presentation/Process", and "Supplementary Materials".

The **preparation** section begins on the following page and includes:

- Participant objectives;
- Three suggested agenda/timeframes to help you meet the needs of the audience and/or available time allotment;
- Support/background materials the presenter may wish to access prior to preparation for presentation;
- Materials and supplies needed for the presentation; and
- Equipment needed for the presentation.

The **presentation/process** section follows preparation suggestions and includes:

- Suggested minutes for information sharing and/or suggested activities for each of the key concepts of the presentation, within each section minutes are enclosed in boxes and intended to be highlighted ahead of time dependent on the overall timeframe selected for the presentation;
- Slides in miniature, in sequential order, with talking points,
 - Usually in bulleted format, not intended to be read verbatim, and
 - Presenter is encouraged to interject his/her own style;
- Participant activities to enhance learning opportunities, indicated by a vertical line to the left of each activity,
 - May be carried out as suggested, or
 - Adjusted to audience and time allotment;
- Presenter notes to suggest background information or extension readings, noted in bold italic font;
- Presenter tips to suggest facilitation techniques, noted in bold italic font; and
- Suggested segue comments to bridge between ideas and/or activities, also noted in bold italic font.

The **supplementary materials** section contains handouts that may be copied and used to support or enhance the presentation.

People to People: the human side of implementation

Preparation

Objectives:

Participants will increase knowledge relative to

- Why it is important to address the human aspects of implementation
- Key elements of both the technical and human sides of implementation
- Where to find more formation

Participants will explore

- Tools to support people to people interactions

Agenda/Timing:

80 minutes - Total time for information sharing, learning activities, Q&A

50 minutes - Total time for information sharing and Q&A

80 minutes - Total time for information sharing, learning activities, Q&A

Suggested time allotments:

30 min	Introduction
5 min	Two sides of implementation
5 min	Technical implementation and schools
20 min	Adaptive implementation and schools
5 min	Further information and resources
15 min	Question and Answer

50 minutes - Total time for information sharing and Q&A

Suggested time allotments:

10 min	Introduction
5 min	Two sides of implementation
5 min	Technical implementation and schools
15 min	Adaptive implementation and schools
5 min	Further information and resources
10 min	Question and Answer

Support Materials:

- Circle of Adults Focusing on Education (C.A.F.E.) Process
<http://www.parentmentors.org/Community/Cafe.php>
- Graduate First: A Georgia Initiative
<http://www.graduatefirst.org>
- IDEA Partnership: Creating Dialogue
<http://ideapartnership.org/>

Materials and Supplies:

PowerPoint slides - or -
Overheads prepared from the PowerPoint slides
Handout Masters – to be copied in appropriate numbers
Chart paper and markers
Paper and pencils for Participants

Equipment:

Computer and projector -or-
Overhead projector
Projection screen

People to People: the human side of implementation

Presentation/Process

Introduction

30 minutes

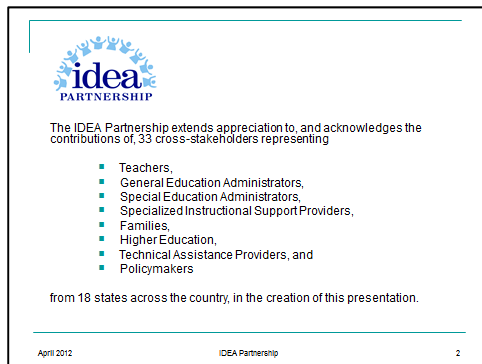
10 minutes



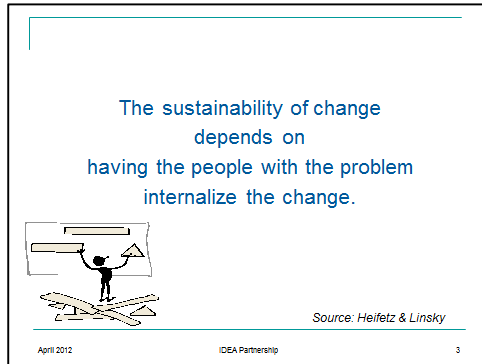
Presenter Tip: The introduction should be very brief and garner interest immediately. The following is a starting point; adapt for the particular audience.

Ideas to share with the participants:

- An initiative (raising test scores, increasing student attendance, dealing with behavioral issues, etc.) may be successful or not
- Often the data are clear what needs to be done; but the how to accomplish the goal may be the difficult part
- Implementation efforts rely on good planning; part of that planning should address the human side of change in order for success to be more likely
- During our time together, we will explore why it is important to address the human side of implementation and share some tools that have been successful in support people throughout a change process



Presenter Note: With information shared by practitioners and researchers at the 2012 Annual IDEA Partnership meeting, this presentation was created through collaborative efforts of many individuals working together. Participants represented a wide-range of roles concerned about education and the children and youth of this country. [noted on slide] Time on this slide is very brief; however, it is important to recognize the efforts of those who worked to make this presentation accessible to the field and the public.



Presenter Note: Allow time for the participants to read the quote before continuing with the presentation. It is not necessary to read aloud unless there is a person with vision issues in the group.

Ideas for sharing with the participants:

- Simple solutions to simple problems often result in success, e.g.
 - High blood pressure – medication
 - Flat tire on bicycle – patch and pump with air
 - Knowing math facts – memorization activities
- When asking people to think differently, act differently, believe differently the success rate is less, e.g.,
 - Eating better and exercising more to lose weight (involves changing values, commitment, follow through for the individual)
 - Community agencies come together to solve dropout problem (involves both contributions of each agency and how each agency can benefit; when not seeing the benefit may withdraw from the effort)
 - School district preschool initiative (involves both the school personnel and classroom readiness as well as the parent education component for support)
- The reality is
 - Unlike our graphic where one person is orchestrating steps in the plan
 - If people do not believe or value the effort, they will not support it
 - Many efforts fail due to failure to address the human elements involved in change

Presenter Note: If using the optional activity, it is conducted before sharing the ideas listed below the miniature slide above. The emphasis should be on the human side of implementation (creating buy-in, attending to needs of people, not just looking at the target, etc.)

Optional Activity for longer presentations:

Depending on number of Participants and how conducted, 10 to 15 minutes

Think, Pair, Share Activity

Lead in questions

- How many of us have been involved in what we believed to be necessary and/or exciting initiatives, only to have them work well or to “fizzle out”?
- What causes initiatives to succeed or come to a halt?

Format of activity:

- Take a few moments (30 to 45 seconds for each question – presenter may signal at the end of the allotted time) to silently think about the question
- Turn to a partner and check in to see if you agree and/or disagree with the same statements.
- At your table, you will then have five minutes to share your rationale. At the end of that time your table will be given a minute to build consensus around the most important points from your discussion.
- Each table will then share their ideas.
- Sharing options:
 - Each spokesperson shares for 2 minutes, 1 minute – dependent on number of tables
 - Each spokesperson shares, careful not to repeat what has been said before and add new insights

Presenter summarizes the statements and includes ideas from the ideas listed below the slide, as needed

Agenda...

- Implementation
 - Technical aspects
 - Adaptive (human) aspects
- Tools to support "People to People"
- Resources for further exploration

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Presenter Tip: The agenda slide is presented as an adult learner organizer tool and should not be omitted. Very little time needs to be spent here for the brief presentation. For the expanded presentation, the presenter may wish to configure the bullets to come in one at a time and give the participants a sentence or two about each as a preview of what is to come.

Ideas for sharing with the participants:

- Why the "human side" of implementation – the research literature speaks to the "adaptive" side of change; we will use that term interchangeably with "human" side of change
- Implementation: Technical and Adaptive
 - Definitions – will briefly define
 - Elements – will look at elements involved and what it takes to support both the technical and adaptive (human) sides of change
- Strategies to support "People to People" – will share some tools that
- Resources for further exploration – will share resources that have been helpful to others as they have taken into consideration the human (adaptive) issues in change efforts

Two sides of implementation

5 minutes

5 minutes

Two sides of implementation

<u>Technical</u>	<u>Adaptive</u>
<ul style="list-style-type: none">■ Identify issue■ Analyze data■ Determine target for correction■ Plan course of action	<ul style="list-style-type: none">■ Human elements■ Relationships■ Engagement and commitment to process

Left unattended: barrier to implementation efforts

Source: Heifetz & Linsky

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Presenter Note: The overlay box (“left unattended...”) enters on CLICK as noted below.

Source: Source: Ronal A. Heifetz & Marty Linsky. Leadership on the Line. Harvard Business School Press, 2002

Ideas for sharing with the participants:

- Technical (definition)
 - Problems for which we have the necessary know-how and procedures
 - Generally easy to identify and determine a solution
 - Problem
 - Brainstorming / problem solving
 - Determine course of action
 - Examples
 - Diabetes – medication
 - Low school attendance – implement incentives for attendance
- Adaptive (definition)
 - Cannot be solved by someone else
 - Require experimentation, discovery, adjustment to past practice
 - Generally more difficult to identify and “buy in” to the solution
 - Human elements are involved
 - Values and beliefs
 - Relationships
 - Comfort zone and resistance to change
 - Examples
 - Diabetes – change in lifestyle to eat healthy, exercise more

- Low school attendance – parental education and commitment; student relationships at school; safe learning environment
- CLICK – left unattended – barrier to implementation efforts

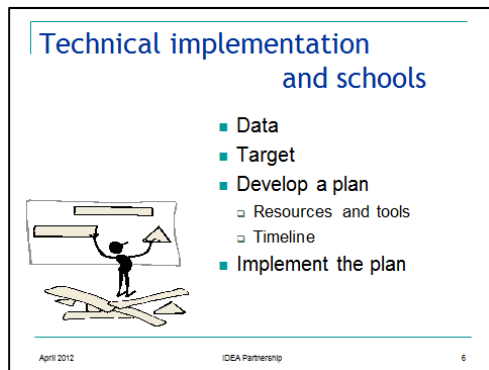
Segue: Let's take a brief look at the elements of both the technical and adaptive sides of change as they relate to school issues.

Technical implementation and schools

5 minutes

5 minutes

Segue: Schools are in a state of constant change these days. Children, teachers, and administrators are being asked to think and work in different ways. There is not a school today that does not have at least one major initiative for school improvement. Such initiatives have both a technical and a human side. Both must be addressed if the initiative is to be as successful as possible



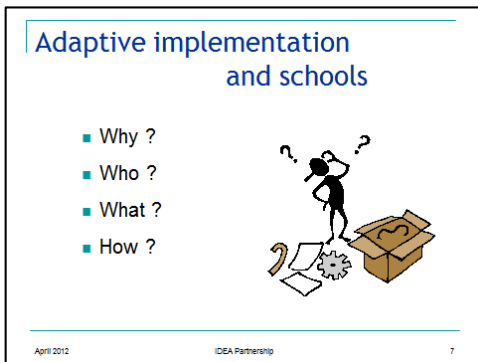
Ideas for sharing with the participants:

- Data - raise an issue
- Target - to improve data outcomes
- Develop a plan
 - Resources and tools – materials needed, personnel for training
 - Timeline – sometimes driven by a grant or mandate
- Implement the plan – as written; according to the timeline developed

Presenter Note: An example of a district initiative is presented below. A personal example to share is suggested.

- Data – over five years; high school student test scores indicate low performance in use of sophisticated language
- Target - to increase student test scores in use of sophisticated language by 10 percentage points over the next three years[short term]; to increase overall use of formal and sophisticated language by 25 percentage points by the time the current kindergarten students graduate from high school [long term]
- Develop a plan
 - Resources and tools – consultant for training in k-12 literacy

- Timeline – 3 years with consultant [short term goal]; build in-house expertise to continue to long term goal
- Implement the plan – work with principals to build a timeline and to provide training and follow-up



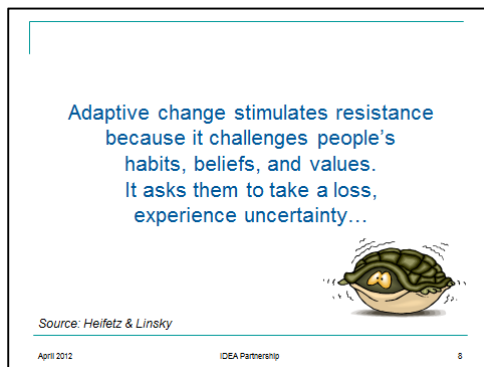
Presenter Note: This slide is included to help the participants organize thinking. Very little time is needed here, but it is important to share briefly to begin thinking differently in comparison to the technical side of implementation.

Ideas for sharing with the participants:

- Why ? - What does this mean for me and my students? Importance, value
- Who ? - Who develops the plan? Central office, committee of grade level teachers who are affected, etc. Who implements at which levels? Who is going to support me as I work to implement the plan? Collaboration , shared leadership
- What is my level of responsibility?
- How ? - How do we get all to buy-in to need for implementation? How do we ensure all have the opportunity to gain necessary skills? How we monitor progress? Back to what is my responsibility? Collaboration

Segue: In this quote from Heifetz and Linsky, they talk about resistance to change. We know that it is not as black and white as stated in this quotation; however, we do know that often there is resistance to change.

Presenter Tip: If you have used the previous optional activity, cite a few of the comments made by participants that relate to the resistance to change.



Ideas for sharing with the participants:

- Simple solutions to simple problems often result in success, e.g.
 - High blood pressure – medication
 - Flat tire on bicycle – patch and pump with air
 - Knowing math facts – memorization activities
- When asking people to think differently, act differently, believe differently the success rate is less, e.g.,
 - Eating better and exercising more to lose weight (involves changing values, commitment, follow through for the individual)
 - Community agencies come together to solve dropout problem (involves both contributions of each agency and how each agency can benefit; when not seeing the benefit may withdraw from the effort)
 - School district preschool initiative (involves both the school personnel and classroom readiness as well as the parent education component for support)
- The reality is
 - If people do not believe or value the effort, they will not support it
 - Many efforts fail due to failure to address the human elements involved in change

Segue: The human side of change includes the relationships that engage us.

Key elements to support people in the change process

- Clearly articulate the goal
- Acknowledge and honor all perspectives
- Identify human capital
- Create the solution together
- Recognize change is not always “comfortable”
- Embrace the effort / celebrate along the way

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Ideas for sharing with the participants:

- Clearly articulate the goal – needs to be measurable so that all can see and understand results
- Acknowledge and honor all perspectives – people in different roles look at an issue in different ways based on their own knowledge and experiences; there is no right or wrong perspective; exploring all sides of an issue adds richness to the conversation and helps to identify points of agreement
- Identify human capital – who has the expertise in what areas that relates to this issue; what expertise do we have; what expertise do we need to seek out
- Create the solution together – creating a solution together creates buy-in and dedication to the implementation of the plan
- Recognize change is not always “comfortable” – doing things differently stretches and challenges us to think differently; while some thrive on change, many find parts or all of a change effort uncomfortable; acknowledging and talking about the difficulties is important
- Embrace the effort / celebrate along the way – at intervals take stock of progress (even small increments); publish and celebrate

Presenter Note: Continuation of the district initiative example is presented below. A personal example to share is suggested.

- Clearly articulate the goal – short term goal (3 years and 10 %age points); long term goal (13 years and 25 %age points)
- Acknowledge and honor all perspectives – teachers, principals, central office meet and discuss the data; its relevance to each grade level, each building

- Identify human capital – a principal strong in data analysis; five elementary teachers recently trained in current reading strategies; need outside consultation particularly at the middle and high school levels
- Create the solution together – district literacy initiative discussed and created by committee of principals and a teacher from each building in the district
- Recognize change is not always “comfortable” – addressing the difficulty of some parts of the literacy initiative throughout implementation with small groups of teachers or individually
- Embrace the effort / celebrate along the way – grade levels meet regularly with principals to review current data; principals meet regularly with superintendent to review current data

People to people skills...

- Knowledge/understanding of the issue
- Clear communication
- Ability to network
- Sharing leadership
- Facilitation
- Cheer-leading

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Ideas for sharing with the participants:

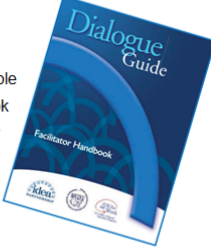
- Knowledge/understanding of the issue – in order to support others in understanding an issue, one must first understand it well him/herself
- Clear communication – oral, written, even considering parallel gestures and facial expressions; ask questions when not fully understanding the other person
- Ability to network – recognizing skills and abilities; accessing as needed; linking others together; not just networking for own purposes
- Sharing leadership – different phases of an initiative need different leadership skills
- Facilitation – sometimes an outside person, disinterested party, is needed to support a group in finding agreement and developing a plan
- Cheer-leading – remember to acknowledge and celebrate small gains as well as large; support with a “can do” attitude

Segue: A process that has found success on addressing the human side of change is dialogue guide engagement; a process developed within the IDEA Partnership. The facilitator handbook is available on the Partnership website.

People to people tools...

Dialogue guide process

- Engage a facilitator
- Invite stakeholders to the table
- Read the same article or look at the same information/data
- Share reactions
- Explore application of newly created knowledge
- Create a plan of action



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Ideas for sharing with the participants:

- Engage a facilitator – the handbook can support anyone in becoming a facilitator of dialogue
- Invite stakeholders to the table – all interested; those who are already committed; those who may be against change
- Read the same article or look at the same information/data – to start the conversation with the same knowledge base
- Share reactions – the facilitator asks questions that clarify reactions to the data/information; while acknowledging and validating differing perspectives
- Explore application of newly created knowledge – the facilitator asks questions that cause the group to think about shared concerns, shared visions; finding common ground
- Create a plan of action – creating a plan that has both technical and human elements

Presenter Note: Adoption and adaptation of the dialogue guide process has been successful in supporting schools to analyze data, develop plans, and implement initiatives that lead to higher graduation rates. You can read about these efforts at

- Circle of Adults Focusing on Education (C.A.F.E.) Process
<http://www.parentmentors.org/Community/Cafe.php>
- Graduate First: A Georgia Initiative
<http://www.graduatefirst.org>

Sharing this information or a personal story about use of dialogue guides is suggested.

Further information and resources:

5 minutes

5 minutes

For further information...

- Circle of Adults Focusing on Education (C.A.F.E.) Process
<http://www.parentmentors.org/Community/Cafe.php>
- Graduate First: A Georgia Initiative
<http://www.graduatefirst.org>
- IDEA Partnership: Creating Dialogue
<http://ideapartnership.org/>

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Presenter Note: Handout #1: *People to People: the human side of implementation Resources for Further Exploration* is available for distribution at this time. Note that more resources are listed in the Resource list on the Partnership website than are presented on this slide.

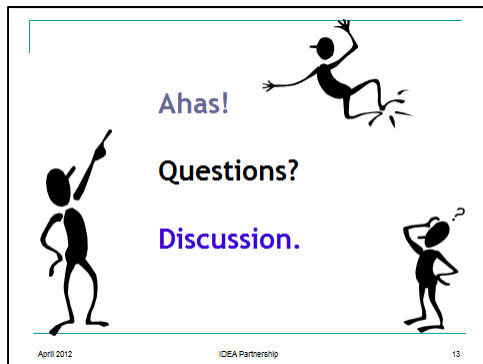
Ideas for sharing with participants:

- Encourage exploration of resources
- Ask if they know of additional resources (federal, state, local) that they can share with all
- Share there is a comprehensive resource list located in the IDEA Partnership Collection (may wish to copy and distribute the longer resource list, based on your audience)

Question and Answer:

15 minutes

10 minutes



Presenter Note: This slide is recommended for use with the longer presentation.

Q&A: depending on time available, takes 5 to 15 minutes

Whole Group Discussion Activity

Lead in statement and questions:

Now that we have spent time in an overview of People to People: the human side of implementation...

- What issues are coming to the forefront for you?
- What questions are uppermost in your mind?

Format of activity:

- Open the floor for discussion
- Paraphrase and repeat whenever clarity is needed
- Answer questions that are answerable
- Record
 - Questions for which there are no answers at this time
 - Issues to explore
 - Suggestions for moving forward
- Facilitate so that all may share in the discussion. Should one or two persons seem to be dominating the discussion, ask for a response from a specific table or from a specific person.

Trainer Tip: Capture key ideas on chart paper. Visual recording for all to see indicates that there will be something done after the discussion and that this is not an exercise in futility.

Presenter paraphrases and summarizes the discussion. He/she indicates where the responses from the discussion will go from here.

People to People: the human side of implementation
Supplementary Materials

Handout #1: *Resources for Further Exploration*

People to People: the human side of implementation

Resources for Further Exploration

Circle of Adults Focusing on Education (C.A.F.E.) Process

<http://www.parentmentors.org/Community/Cafe.php>

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