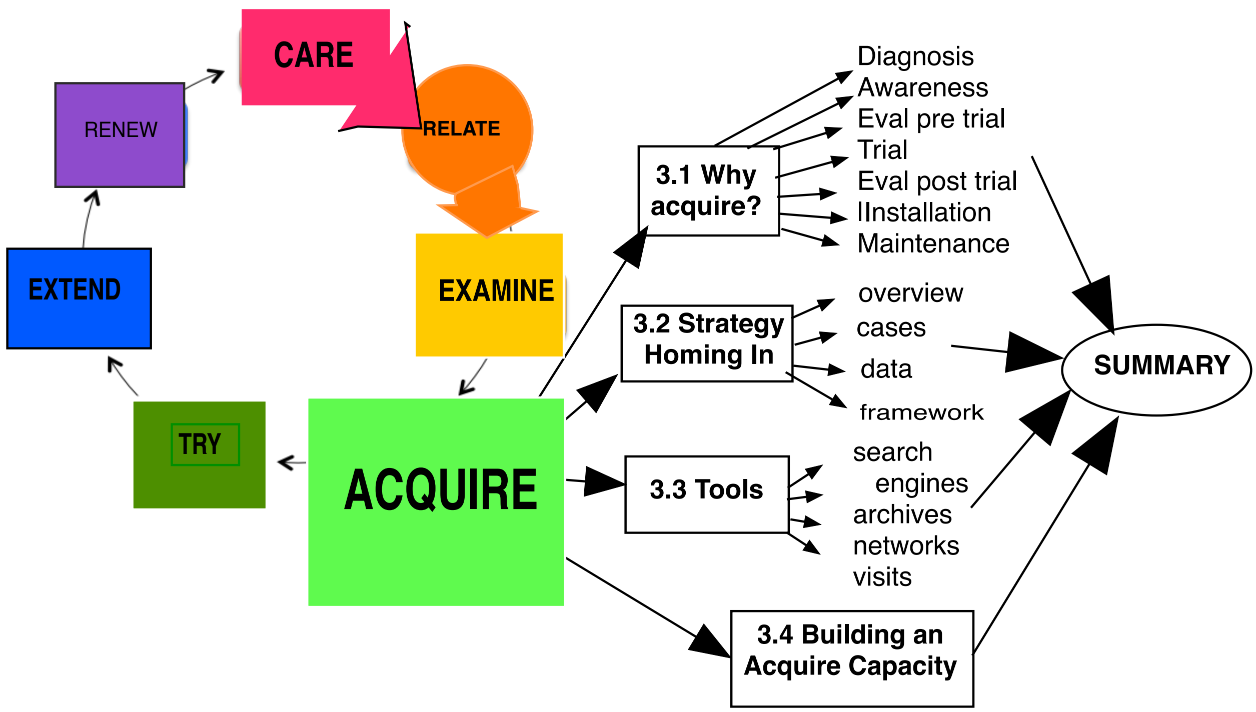
Change Agent's Guide

Excerpt from the 2021 edition
From the Seven Stages of Change

Stage 3: ACQUIRE

With an adequate definition in hand, the change agent and the system can begin to reach out for resources that might be relevant. "Resources" come in many forms: people, finances, space, time, technology, and especially knowledge of other change efforts, successful and otherwise. Just plain ideas can also be useful resources.

Figure 3.1 Elements of the Acquire Stage



Resource acquisition is the stage most underrated and most frequently slighted by busy and confident change agents, too easily deluding themselves that they know it all already. IGNORE THIS STEP AT YOUR PERIL.

Think you already have all the resources that could be useful?
YOU DON'T!
Think that this project is so innovative that past experience is irrelevant?
IT ISN'T!
No project is ever so new and creative
that it can't be improved substantially
by applying information from the past
Think there is no relevant knowledge elsewhere that applies to this case?
THAT IS NEVER THE CASE!
Feel that other resources are too hard to go after?

WRONG! IT IS ALWAYS WORTH A TRY,

***IN THE DIGITAL AGE**,*
it is increasingly easy and inexpensive
to gain access
to an incredibly rich and diverse resource universe

The task of information retrieval can be handled with a minimum of effort if searchers think about what they need before they start and set an acquisition strategy that makes sense in terms of their needs.

STAGE 3 is divided into four sections. Section 1 lists the major purposes of acquisition. These purposes can be summarized in seven concepts comprising the acronym "D-A-E-T-E-I-M." Section 2 suggests a strategy for *homing in* on specific solutions. In Section 3 considers the different kinds of *tools* that are usually available for any acquisition strategy. Finally, in Section 4 we consider how to build and maintain a permanent resource acquisition capability.

For the change agent, acquiring *knowledge about the process* of change may be the most important type of resource acquisition. As you read through STAGE 3, keep in mind that we are only discussing resource *acquisition,* not resource *evaluation* or *utilization;* these will be the topics of subsequent chapters. Here we are concerned with how to get it, not what to do with it once we have it.

A Prime Example of Resource Acquisition

On June 1, 1965, *Robert Manry set out from Falmouth, Massachusetts, in* a *13-foot sailboat to cross the Atlantic to Falmouth, England. Manry was confident that he could make it, not because he was foolhardy or exceptionally brave, but because he had done* a *very thorough and systematic job of resource retrieval. He had read the accounts of past voyages; he knew the weather patterns, the currents, and the shipping traffic. He knew what food, navigational gear, emergency equip-ment, and clothing to provide for himself, and above all he knew his boat. He knew what it could take and how it would behave in various conditions. Manry made* a *successful crossing largely because he had done such* a *complete job of resource acquisition.*

Stage 3.1: D-A-E-T-E-I-M

Seven Reasons to Acquire Resources

Resource acquisition is appropriate at any point in the change process when the change agent and his/her clients find that they need additional facts, ideas, materials, or equip-ment to help them make a decision or understand their situation more fully. These general purposes for resource acquisition are summed up in seven concepts: Diagnosis; Awareness; Evaluation-Before-Trial; Trial; Evaluation-After- Trial; Installation; and Maintenance.

***D**iagnosis; Examining cares, needs, problems, and circumstances of the client*

There are resources to help us understand the client system, its needs and problems. Most systems keep records. All members keep mental records. Some members are observers. All these sources of information need to be surfaced and sifted to get a clear picture of what is going on.

Awareness. Scan the horizon for a wide range of alternative possibilities.

*What has been tried elsewhere having similarity to what we are have here?
*What are the new technologies that might have some relevance?
*What are some ideas talked about in the literature or floated in the media?

A broad awareness of what is "new" provides images of solutions.
It liberates our vision.
It breaks us out of traditional molds.

Evaluation-before-trial

There is information which allows us to judge and compare alternative solutions; information about "validity," "reliability," and "effectiveness" of the innovation as demonstrated in other settings. What really works? What is the proof that it works?

Trial

Some resources allow us to demonstrate the innovation in our own setting. Information that explains in detail how to try out an innovation on an experimental basis can be very helpful. Usually the best source for such information is someone who has actually tried it. Those who have succeeded and those who have failed can be equally helpful. A visit to a site where something like the innovation you are planning is already in practice is ideal.

Evaluation-after-trial

There is information which helps us to evaluate the success of the trial and helps us determine if the innovation solves *our* problems and meets *our* needs. Such information must be generated within the client system itself. It cannot be acquired from outside sources.

Installation

There are resources which provide detailed information on start-up costs and requirements for new staff, training, and readjustments so that we can plan for system-wide adoption of an innovation.

Maintenance

Serious continued adoption of an innovation requires information on long-term costs and problems of upkeep. What do we need to know to evaluate and to assist in maintaining the innovation on a continuing basis after successful installation?

The DAETEIM formula corresponds roughly to the process of planned change as it is experienced by the client system. However, two points should be kept in mind in reviewing this list. First, because different client systems experience the change process differently, the sequence in which information is acquired rarely follows the order in which we have presented these purposes. For example, the clients' "awareness" of change possibilities may *precede* their "diagnosis" of a need for change in their system. Second, it is likely that resources relevant to several purposes will often be acquired simultaneously. The following examples illustrate how certain resources can serve these DAETEIM purposes:

Example A
If the change agent and the clients want to learn more about how their system operates and what the sources of some of their problems may be (Diagnosis), they may find help in internet searches, books and articles on organization development (sometimes referred to in professional circles as "OD"). Such information will provide them with a general understanding (Awareness) of the nature of systems and of human interaction and will familiarize them with concepts such as "role," "influence," "communication networks," etc. If they wish to explore the operation of their own system further, they might get information on procedures and instruments for diagnosis from other people's research. They might even call in a specialist in diagnosis.
Example B
Quite different resources might be tapped by members of a system whose purpose in resource acquisition is to *install* an innovation which they have tried, evaluated, and decided to adopt. These change agents need facts and figures on installation costs, necessary space, training, etc. They also may want to show all members of their system how effective the pilot model has been, and so they may choose to find out how to conduct a successful demonstration. They will want to involve their own people who participated in the pilot project in the demonstration and training aspects of the installation. They may also call on outsiders who have had experience with the innovation to get advice on time, cost, and special requirements of installation. Websites or other promotional material from developers or manufacturers may also be very useful at this stage.

Stage 3.2 Acquisition Strategies
Each user has habitual methods of searching for and tracking down needed resources. Often these methods are efficient and reliable and at times they are not, but however effective they may be, they are probably going to be hard to change. The "rational" strategy described below should be seen in this light. It should be viewed as a model which some change agents will find compatible and others will not. However, many of the ideas about acquisition contained herein should be adaptable in part even if they are not adoptable in whole.

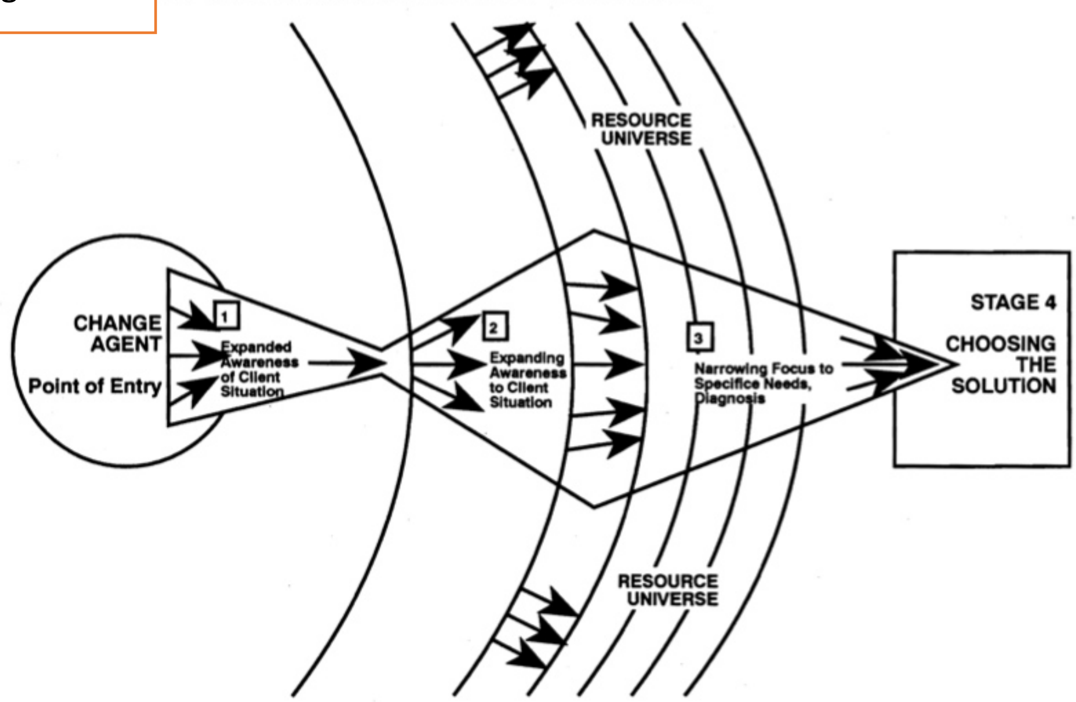
Problem-solving calls for four kinds of search/acquisition processes which parallel the purposes described above. The first starts with your point of entry into the situation, the initiating concern or catalyst which brought you to the point that you would do something to try to bring about change in this place, in this system, with these clients, at this time. Your search orientation at the outset should be *expansive*. You are learning about the environment that you are in, the levels of caring about different issues (Stage 0), the numbers and types of people involved and their inter-relationships (Stage 1), and how the client group works as a system, identifying the various needs of different stakeholders (Stage 2).

At some point you will feel you have enough raw data about what is going on. Then you will want to shift gears, setting yourself on a path toward *narrowing* the alternatives, the potential targets of change, the range of cares and concerns to be dealt with. In this first narrowing process, you will be tentatively setting a lot of things aside, not because they are unimportant, but because they cannot be reasonably accommodated in this first change effort. As you move toward a definition of the problem that you are really going to deal with in this first round, you will be engaged in a different sort of search, far more directed. You will now have a number of *key words* which can increase the efficiency of searches of websites, digital libraries, databases, and information services. You will also have some much more specific questions to put to various informants and key players, questions which will allow you to get underneath the surface of the problem.

Now with the problem situation, the need, and perhaps even some of the goals well-defined, you should shift gears again, expanding your search once more to take in the widest consideration of potential solution ideas.

The resource environment is extremely rich. Indeed, it is so rich that you can't possibly know all that is there. It presents you and your client with a bewildering universe of "potential" resources. Yet optimal problem-solving also requires a general *awareness* of potential resources. The key to success in matching problems with solutions is awareness of this resource universe. Users with a broad span of resource awareness are rarely stopped by a problem because they know where to go to start homing in on solutions. When they hear a problem stated, they say to themselves: "I remember reading (or hearing or seeing) something that pertains to that problem." Once that mental connection has been made they can start *"homing in"* on solutions, contacting the relevant people and orga-nizations, retrieving the relevant research, acquiring the relevant materials, etc. Finally there will again come a point in the proceedings when it will be essential to limit the task of retrieval, and to settle on a sequence of steps which permits *homing in* on sources which have the highest probability of payoff. This "homing in" strategy is the fourth and final acquisition process that is required for problem solving.

Figure 3.2 **RESOURCE ACQUISITION STRATEGY**



Chronologically, Figure 3-2 starts at the far left with the client's situation at the time the change agent enters the picture. Moving right, we see the diagnostic information retrieval from the client's situation leading to identification of some specific problems and perhaps the statement of objectives in behavioral. These pin-pointed problems feed into the awareness net of the change agent, and hopefully they trigger connections in his or her mind with various resources i.e. print, people, and products. With such resources in mind, he or she can begin to *home in,* acquiring a range of solution-relevant items which can be used in choosing the solution alternatives, discussed in STAGE 4.

*Acquiring an expanded awareness of the universe of client concerns*As you, the change agent, enters the scene, you want to start by setting aside as many assumptions and presuppositions as possible. You should be in a *listening* mode. Make like everything is up for grabs, e.g.:

- what the real need is,
- who the client is,
- what can or should be done,
- even what your own role might be.

It is very difficult to be this open about anything. Humans are orderly beings. We crave definition and position, but as a change agent, you should try to restrain these tendencies at the outset. There will be plenty of time for them later. Here are four ways to begin an expanded search to determine where you are, who they are, what they need, and where you belong in their process:

Using the problem vocalizer as first information source
If the change agent enters the client system by invitation of some individual in the system, that person is usually the one individual who has the most concern or the most acute sense of the problem. This person is necessarily your initial source for diagnostic information. Keeping in mind that he or she may not have the clearest, most perceptive, or most objective view of the total situation, you may still use him or her as an informant to obtain most of what you need to know. Above all, it is important that you make face-to-face contact with this individual, preferably at his or her place of work or residence or both. It is also important that you have a chance for extended contact so that you can get to know each other (see Stage 1) and so that he or she can really share perceptions of the problem in an honest straightforward manner.

To get the most out of your informants you should follow a three-step strategy of (1) listening, (2) reflecting, and (3) inquiring.

(1) You should begin by *listening,* allowing your informants to tell as much as they want to tell and as much as they think you need to know. If they are very experienced and adept at using consultative help, they may give you all you need to know without any active inquiry from you.

The "reflection" process described here, is also a *good way to build* a *relationship or to resolve* a *conflict. The end product is "trust," in the literal sense of knowing where the other person stands.*

(2) Once the initial contact persons have stated the situation to their satisfaction, you should *tell them what you heard them saying to you,* restating as accurately and concisely as you can what you thought they were saying. When you are done, ask them if

that is what they meant to say. If you are really communicating with each other, they will agree with your *reflection* of their statement; however, there may be points of misunderstanding or unclarity. Repeating the same statement-and-reflection process again and again, you and they will gradually move toward consensus.

(3) Finally, when you have consensus on their story you may want to make some more detailed *inquiry* or probing, especially to fill in gaps in your understanding.

Recording diagnostic information received from human sources (vocalizers, key informants, groups, etc.) can be a tricky problem. Most interviewers prefer not to take extensive notes while the interview is in progress because this interferes with their ability to listen, reflect, observe, and respond. If accuracy and comprehensiveness of the data are very important, there is no substitute for the recording, but if only highlights and overall impressions are needed, the simplest procedure is to record your summary of what was said *immediately after* the interview either on paper or into a recording app. An open-ended form such as might be generated from the diagnostic inventory described in Stage 2 would be useful for this purpose. Do not record more than you need.

Using key informants within the system
It is usually important to acquire this preliminary situation-definitional information from more than one source and, in a complex client system, from more than one level and more than one faction. The same general rules apply to the use of key informants as apply to the problem vocalizer described above, with one significant exception: you cannot assume that key informants will be eager to tell you their views of the problem because it is you, *not they,* who are initiating the contact. You need to establish your legitimacy and sincerity as a diagnostician and a consultant (see again Stage 1). You may have to start by telling them why you are in the system in the first place and why you are asking them questions. For this purpose, face-to-face contact is vital. Once you have established yourself with them as a trustworthy individual who is sincerely trying to help, you can proceed through the listening -reflecting -inquiring sequence.

Group interviewing
When time is short and it is essential to get a variety of perspectives, the change agent may ask the spokesperson from the client system to bring together a representative group. With the assembled group you can then proceed through the same listening--reflecting-inquiring sequence, but there are important differences from individual interviewing: e.g., you should observe how the members of the group are relating to each other, the extent to which they defer to authority, and their reticence about disagreeing or speaking up to add to or to correct the story. The interviewer should be able to test the group's willingness to open up on what the real issues are. In order to do this, you need to have a good understanding of group dynamics and preferably some experience in human relations training. With such a background, you will be able to derive much valuable diagnostic information not only from *listening* to what members of the group say, but also from *observing* how they react to one another.

A possible alternative to group interviewing would be a blog site where individuals can interact and contribute information at will. Unique in this environment is a digital log of the input and conversation, which may provide more insight into the issues. Like group interviewing it is important to understand how individuals may interact in the digital environment. Social media can open new doors to gaining information that will be helpful in the gathering of information.

Observation
Using human resources in face-to-face interchange as described in the techniques listed provides *verbal/written* information, but there is also an important dividend: the chance to observe the people in the system, how they relate to you and to each other, how they act and react in response to a number of situations. It is also sometimes valuable to make site visits solely for the sake of observing what is going on, without asking questions. Early on you may conduct such visits without having a very clear idea of what you are looking for. However, being a good observer, requires training and experience as well as open eyes and ears. Be especially sensitive to how others will see you and whether or not they will accept your "observer" status. Usually, strangers have to have a pretty good reason for doing whatever they are doing to be accepted.

An alternative or supplementary source of observational information is *other outsiders* who have known the client system for a number of years. Other outside consultants who have worked with the system from time to time should also be able to provide valuable insights.

How to acquire more systematic diagnostic information
To narrow the search to a specific diagnosis, the change agent must acquire more detailed information about the client system and about the specific problem under consideration. This information should be acquired in a systematic manner and in a form, which allows quantitative comparison so that we know the dimension and importance of the problem relative to other problems in the same system and the same problem in other systems. In Stage 2 we offered a number of conceptual models and suggested a number of dimensions that could be applied in making a systematic diagnosis, but we said little about the actual mechanisms that could be used for acquiring information to put in these categories.

Five such mechanisms in increasing order of complexity and difficulty are:

Observing and measuring system outputs (intended and unintended)
Hard evidence of the attainment of meaningful objectives is difficult to obtain from schools, non-profits and government agencies. Although there is much pressure to move toward systems which are "accountable" for attainment of measurable objectives, the availability of such hard data is difficult in some environments. However, there are some telltale signs that things are not going well, such as employee turnover and accounting reports. Outputs of the system's website, newsletters, catalogues, may reveal a good deal about the range of activities, the degree of participation and the orientation of the system. It is not possible to provide a detailed guide to varied sources for diagnostic information, but only to point out what a variety of potential sources there are. Be flexible and cast your net widely.

Organizing a *self-diagnostic workshop for the client system*
Change agents with considerable skills in human relations, group work, or conference management may want to initiate a series of meetings, physical or virtual, throughout the client system where members representing all levels interact together to make an

assessment of the problems of their system. This procedure, though complex and risky, has two special advantages:

- first, it allows genuine confrontation of problems and involvement in initiating change on the part of members at all levels; and,
- second, if done well, it provides a more detailed and more accurate accounting of the prevailing situation.

Using an outside diagnostic research team
If the system is very large and the problem is pervasive and if there are considerable financial resources available for diagnosis, the change agent might well consider contracting with a university, a social research center, or a private consulting firm to administer survey instruments for a TIMELY thorough, systematic, and scientific job of diagnosis or needs assessment. The underlying problem will probably be *perceived relevance*. In spite of mountains of data and tests of statistical significance, it may be hard to convince a client that a diagnosis arrived at by a team of outside experts is really relevant and valid unless the client system itself is involved as a collaborator in the development of measures and the collection of the data.

Collaborative systematic diagnostic program
Probably the most elaborate and elegant procedure for acquiring diagnostic information is a combination of "Organizing a self-diagnostic workshop for the client system" and "Using an outside diagnostic research team", wherein an inside-outside team organizes a program for system self-diagnosis using trained outside experts as trainers and instrument developers for the members of the client system. This strategy can have many variants and many components.

Continuous quantitative diagnostic monitoring
The most sophisticated type of diagnostic information is that which is carried on by the client system for itself on a continuous or periodic basis using objective behavioral criteria recognized as legitimate and valid by insiders and by outside experts. To design and install such a monitoring system is a *major change project in itself,* requiring the employment of all the skills, artistry, and know-how that a change agent could muster. However, a system with such a capability has moved a long way toward genuine self-renewal.

How to build an adequate awareness of the resource universe
Awareness is the key to an intelligent overall acquisition strategy. As a change agent you cannot be a universal expert. Rather you should be a knowledge broker, a linker to outside resources who can maintain a generalist's perspective in relation to specific innovations. You should be "a mile wide and an inch deep" when it comes to specific "facts," having the widest possible span of awareness of the resource universe while retaining your capacity to "zero in" on detailed sources when the diagnosis fits and the time is ripe.

Building Awareness
Usually "professionals" in a given field have a broad span of awareness within that field. They were trained in it and carry with them from that formal background a general set of categories associated with names and books and sometimes places. If you are new to

a field, however, or if your training is outdated, you should build or rebuild that awareness memory bank by researching the Internet, joining a social media group, reading an introductory texts on the subject or, if possible, taking an introductory university course. Reviewing research articles is truly a marvelous tool. Research articles are organized and indexed summary/synthesis of knowledge within a given domain, usually written to show how the various pieces of the knowledge domain go together and build on one another

Maintaining Awareness
For *maintaining awareness,* a different set of media and mechanisms is appropriate. The most useful tools for maintaining awareness are websites, blogs, social media sites, periodicals, personal acquaintances, and a knowledge of information systems and services.

Periodicals, Research Journals and Mass Media. There are interesting periodicals / journals which cover a broad range of topics very concisely. They can keep yourself informed on what is new in the field, what is fully developed, and what is projected for the future. Periodicals, Research Journals also provide enough information to steer you to more specifics when you need them. Newspapers and, to a lesser extent, television should also be scanned for relevant items, but the coverage is likely to be spotty and sporadic.

A Personal Acquaintance Network. Maintaining personal contacts with a variety of knowledgeable people is very important. Many studies have shown that the most innovative people in any field have numerous contacts and encounters with others outside their system, people who are different from themselves in background, role, perspective, skill, and knowledge. Maintaining a personal-contact network keeps the change agent aware of new developments in a variety of fields and within easy reach of people who can provide more detailed information when and if he needs it. Activities likely to build and maintain this interpersonal network are:

- attendance at professional meetings;
- visits to other locations, for whatever purpose;
- phone calls to outsiders, for whatever purpose;
- interacting with people who are in different roles and different systems whenever the opportunity arises;
- maintaining good contacts and a habit of consulting with insiders and colleagues who work with you is also important; and
- e-mail, blogging, LinkedIn, Twitter and Facebook access to individuals with similar concerns

For the change agent the critical factor is *awareness* of these sources, awareness of the types of information services and centers available, where they are located, and how they can be utilized.

"Homing in" on a *specific problem and/or solution*
As you and your client begin to focus on the problem and have some notion of possible solutions, you should develop a strategy for "homing in," acquiring the information and

materials you will need for -E-T-E-I-M (Evaluation-Before-Trial,. Trial, Evaluation-After-Trial, Installation, and Maintenance). There are probably as many ways to "home in" as there are change agents, but the optimum strategy proposed below may contain elements you will want to adapt to your own needs. We suggest a six-step sequence:

A *Homing in Strategy*:

a. overview from websites or written sources
b. overview from knowledgeable person
c. observe "live" examples
d. obtain evaluative data
e. obtain innovation for a trial
f. acquire a framework for evaluation-after-trial

Acquire an overview from a *comprehensive written source or website.*

Even if you have a very specific plan in mind, it is good policy to become generally knowledgeable about research, development, theory, and past practice in the area on which you have chosen to focus your attention. This usually means reading or scanning a current or recent scholarly review article in that domain. In many areas of reform there are conflicting theories and competing innovations. To be on firm ground, you should have an overview of the field even if you are committed to one or another of these competing forces.

A scholarly review article, a book, or a discussion list from the Internet, should give you a feel for: (1) the scope of the topic, (2) the work that has been done in various places at various times, (3) the level of solid *research* understanding of the topic, and (4) valuable leads to more detailed sources. However, such general review sources probably will *not* give you information such as: (1) the range of innovations available, (2) enough information to evaluate specific innovations, (3) enough information to diagnose specific problems, or (4) practical suggestions about what to do. These drawbacks can be remedied by referral to more popular books or articles and to knowledgeable human resources.

Contact at least one person who has had direct experience.

Usually there will be others who have successfully or unsuccessfully, done what you are contemplating doing. You should talk to at least one of them, preferably in person, as part of your homing in process. Such individuals will give valuable information for evaluation-before-trial. They will give you leads as to relevance, workability, and problems which promoters of an innovation are unlikely to divulge voluntarily. If you, as a change agent, find this contact person to be articulate and informed, you should also consider him or her as a potential on-site consultant and a resource for your client.

Observe the innovation in a *concrete or* a *"live" form.*

If the innovation under consideration is available online on a website or in a printed or packaged form which can be borrowed or sampled, you should obtain it. In recent years complex innovations have become available in packages which may give a more complete impression of how the innovation will really work when installed. In addition, if the innovation is installed and operating somewhere, you should go and look at it, asking yourself *three key questions:*

- Is it really *working* for them?
- Is it really *benefitting* them?
- Will it really *work for us?*

Are there obvious differences between these users and our clients which might make it unfeasible in our setting? *Conversely,* are there positive advantages to our setting which might make the innovation more effective for us than it is for them?

Obtain evaluative data.

Even if you are really "turned on" by an innovation after observing it, you should still try to find scientific evaluative data to check out your impressions before you or your client actually make a commitment. Such data may or may not confirm what you have already concluded about the innovation and what its promoters claim. In looking for evaluative information, do not restrict yourself to one source if more than one is available. Too often evaluations are partisan and partial, especially when made by the innovation's author or promoter. The more disinterested the evaluation and the more the evaluator adheres to scientific rules of evidence, the more you can count on the results. Evaluative data are often found in formal reports or are reported in research journals. This means the language may be technical and the findings difficult for lay persons to interpret. If you cannot understand what is written or if the implications for practitioners are not clear, it may be worth your while to call or email the author/evaluator and get that person to communicate with you informally. You will probably find that they have thought a great deal about practical implications and can offer their informed judgment in a clear and non-technical way. You will also probably gain more cooperation if you indicate that you have read their research.

If you find that no "hard" data are available to evaluate the innovative program you are considering, you should try to acquire "soft" data in the form of personal evaluations by at least two persons representing different perspectives, e.g., one who has tried it, and one who has critically observed someone else try it.

Obtain the innovation for a *trial.*

If your pre-trial evaluation data confirm your judgment to proceed, you should attempt to acquire the innovation or the necessary materials for use in an experimental trial and demonstration in your client system. This will usually involve direct contact and negotiation with the developers and/or suppliers. In asking for materials or other resources on a trial basis, make sure you also inquire about the availability of written / internet materials on *costs of installation and maintenance, performance specifications,* and *claims concerning benefits* (short-term and long-term), supplementary materials required and provided (e.g., manuals), limiting conditions, guarantees of quality and reliability, and *problems that might be encountered in terminating the innovation at* a *later date*. There probably won't be many answers to these questions, but if you feel that the supplier is being evasive and you find you are getting *none* of your questions answered, it is probably a good clue that you should search elsewhere.

Acquire a *framework for evaluating the results of the trial,*

Even before an actual trial effort takes place, the client system should be committed to a plan or procedure for evaluating the trial and making a "go-no-go" decision. This is critical because all too often a so-called "trial" experiment results in permanent adoption simply because the clients have no plan for evaluating and, if necessary, rejecting what does not work; they accept it because it is there and for no better reason.

In establishing a framework for evaluation, your first information need is for criteria on which to base a judgment. In Stage 4 we will discuss some of the criteria which are relevant under three headings: "potential benefit" "workability," and "diffusability." At the trial stage, you and your client should be collecting *your own* data, judgments, and impressions about *installation* costs and problems and *maintenance* costs and problems. The criteria used in available evaluation reports on the same innovation in other settings will also provide ideas for criteria to be applied in your setting.

Of special value, and special rarity, are research evaluations which use the fulfillment of specific objectives as criteria. Because of the specificity and observability of the measures in such cases, you will have little trouble adapting them for use in your setting.

If an innovation is expensive, complex, or unusually risky, you may want to acquire the services of an outside professional evaluator or evaluation team. A vigorous search should get you an experienced evaluator if you and your client decide that such help is necessary.

In laying out this proposed strategy for "homing in," we may have accentuated the positive intentionally in the belief that most change agents and their clients do not try hard enough to reach out for available resources. However, we also recognize that you will not always succeed in getting the information you want. This fact should not stop you, however, because there are always *human resources,* people with relevant experience and knowledge from which you can benefit. Moreover, as we shall explain in Stage 4, it is also possible for the client system to invent their own innovation to meet a specified need if they cannot find adequate outside resources.

Stage 3.3 Acquisition Tools

THE INTERNET TOOLS

Using the Internet (wisely and economically)

At present time, the internet is almost always the first stop, and probably ought to be. There are many caveats, however. The successful change agent needs to be an intelligent internet explorer. Consider the following.

<u>What's right with internet search engines? Fast, Vast, & Easy</u>

Fast: at the fingertips, any place, any time, 24-7.
Vast- every conceivable topic is covered
Easy to use, superficially at least
Almost everybody uses it as an information highway
Connects to everything the change agent may need: people, financial sources, ideas, facts, stories, pictures, film, lectures, discussions, dialogs
There is always a chance that you will find exactly what you are looking for!

What's wrong with existing internet search engines?

Validity: scientifically validated knowledge may be there in some cases, but how do we know? What are the signs that indicate credibility?

Statistics: the gold standard

Testimonials from credible witnesses: why are they credible?

Knowledge, surmise, conjecture, half-truths, and even lies may all be lumped in together. There is no referee.

They are all competing for your attention, your interest, and your acceptance of what they are offering or selling

It is easy to be misled. We may get some of the truth, but rarely the whole truth, and even more rarely nothing but the truth

There are numerous internet players out there whose entire job is to *mislead*, even guiding users in directions opposite from where they intended to go.

If there is anything *controversial or political* about your change project, you can count on there being many web sites that are deliberately designed to bias the searcher in one direction or another.

Always keep in mind that the most valuable information is not always given away free. If the offeror seems to have exactly what we are looking for, it may well be worth the cost of walking through that pay wall, but how do we know what is worth paying for even if we have the money?

Specific Internet Tools

Search Engines

Within the Internet there has mushroomed up any number of specialized tools, starting with key-word dependent Search Engines such as Google, Bing, Yahoo Search, Ask, and Aol Search, create portals to acquiring information.

When searching for information on the Internet:

1. Use specific and unique, i.e., Keywords that identify the concept
2. Put important words first
3. Quotation marks narrow searches and are helpful
4. Use the "AutoComplete", allowing the search engine to assist in selecting websites
5. Combine phrases with the (+) and or the (-)sign to expand or limit a search
6. Pinpoint and analyze your results from your initial search list
7. Use subject specific databases
8. Use Library gateways and subject specific databases for specific links, multimedia files, archives, mailing lists or special topics

Setting search parameters and having assessment tools are critical when evaluating the digital information. Always ask yourself what are the essential pieces of information and who are the critical individuals to help provide good information.

- Do the examples and case studies match the issues you and your client are facing?
- Do the solutions fit within the parameters definition of the problem?
- What are the qualifications of the individuals you are connecting with?
- How well do they communicate issues they have dealt with?
- Do they provide credible references?
- What tools did they use in their "change process"?
- What assessments were used in evaluating solutions?

Social Networking

Sites such as Facebook, Twitter, LinkedIn, Pinterest, Google Plus+, Instagram, and Tumblr connect individuals and create opportunities to interact and exchange information.

Blogs open doors to electronic forums that can be content specific. The range of connectivity to resources, information, data, and people is wide and deep.

Subject Specific Database

Library gateways and subject specific databases are useful for specific links, multimedia files, archives, mailing lists or special topics

Have a Plan for Using the Internet Tools

1. Define dimensions of problem or situation with *key words*. Write them down!

2. Brainstorm with the change team or key members of the client system

3. Use specific and unique terms, i.e., Keywords that identify the concept

4. Put important words first

5. Quotation marks narrow searches and are helpful

6. "AutoComplete", allows the search engine to assist in selecting websites

7. Combine phrases with (+) and or (-)sign to expand or limit a search
   Note *names* that crop up associated with topics, especially names of *authors of recent textbooks* or important reports or studies.

8. Set aside specific amounts of time and resources to conduct search stage

9. Ration Search; set limits on time, topics, extent of collective involvement

10. Encourage Participation in Search

11. Delegate search tasks to members of change team

12. Discuss search strategy among members

13. Leave room for serendipity
    Sometimes you may want to look for inspiration or stimulation, allowing you to refocus or to think outside the box
    Strategies that are too narrowly focused may block fresh thinking

TOOLS BEYOND THE INTERNET

Think of resources in several different terms:

- Funds,
- People (several types),
- Ideas,
- Documents,
- Products, Projects

Networks and Networking as Tools

For the Change Agent, "connecting the dots" and analyzing information is a challenge because of the shear mass of available information. A necessary critical skill of the Change Agent is the ability to sort data and understand what information fits the problem and what should be ignored or bypassed. Finding examples and case studies of successful implementation plans, and individuals who have expertise helps create the opportunity to facilitate solution findings.

The Internet can provide data, and lots of it. The question for the Change Agent is when to "reach-out" beyond the digital to connect directly to individuals. It is important to remember the different roles individuals play in the "Change Process." Key types:

leaders,
key stakeholders,
good observers,
advocates,
skeptics,
typical users, and
observers.

Each will provide a unique perspective and viewpoint.

When making connections, it is also important to keep in mind the complex web of social links from your Stage 1 RELATE analysis. These relationships are not only beneficial to your client but also to the individual you are talking with. This web is your main avenue you to deeper understanding, providing critical information for solving problems and finding workable solutions.

Which People Are Likely to be the most valuable connections?

Someone who has done something similar to what you are thinking of doing
Someone who has evaluated such a project or product
Someone who has experienced something like this as an end user
Someone who is an acknowledged expert, e.g. author of textbook on topic

Live Interviews

There is nothing quite like arranging an extended interview with someone who has had some experience with what you are planning to do. There are four basic types, each with special advantages and cautions.

Advocates:
It is good to talk to some people who are enthusiastic about doing this sort of thing. They can provide some of the energy that comes from high hopes and they can tell you a lot about their experience, intentionally and sometimes unintentionally. You need to get a good idea of the upsides and the potential rewards from getting involved .

Skeptics:
You also need to be aware of the potential downsides of implementing any particular change project, such as costs, difficulties in implementation, training, explaining what you are trying to do. You also need to be aware of the risks of project rejection or failure at any place along the road to full implementation.

Typical Users:
If at all possible, it is good to get a view of the project from the lowest levels, the people who are most directly involved in implementation or the users or customers for whom the innovation is presumed to be a benefit. It is not easy to do this because there is no easy way to identify the most representative user. Nevertheless, incidental contacts with users more or less at random can yield valuable insights. Site visits, as discussed below, can be a gateway to such opportunities.

Neutral Observers:
Probably this is the most useful category except for one thing: how do we know who is really "neutral."

On Site Visits

View & Experience the Innovation in a Natural Setting

The ability to actually view an implemented innovation can also provide critical information. The "living" case study can broaden the Change Agent's understanding and reveal many of the problems of implementing a complex innovation project. It can help identify people, processes and issues of certain solutions, and provide a possible roadmap to implementation.

3.4 Building a Permanent Capacity for Resource Acquisition

Acquiring diagnostic information, maintaining awareness, and homing in are skills and procedures which all change agents should know and have, but they are also activities that client systems should learn to initiate on their own. Resource acquiring know-how is a large part of building a *self-renewal* capacity (see Stage 6 for more discussion of this concept). Above all, your client system should be encouraged to build and maintain a broad span of awareness of the outside world. This means establishing and maintaining meaningful human links with other systems and the resource mechanisms set up by the professional associations and foundations. These linkages are built and maintained through developing habits of visiting, being visited, interacting on the Internet, and generally being curious and open minded about the larger social environment. Extensive use of a variety of resources is not a common practice among many persons. Frequently there is substantial resistance to resource retrieval as a result of people's negative impressions about its "helpfulness." In other words, they do not believe that there is anything in outside resource systems "worth" acquiring. The change agent can encourage his clients to change this un-professional state-of-mind to become more familiar with he advantages of using outside resources.

Listed are several suggestions for helping clients learn more about resources and resource retrieval.

Provide a *supportive atmosphere* for the retrieval of resources by members of the system. Get official recognition and legitimation of the need for the use of resources through the provision of time, money, etc., to carry out retrieval and acquisition operations

Maintain existing interaction and search norms (e.g., the "sharing" of practices). It is always easier to get people to "add on" new behavior than to replace one kind of behavior with another. Some of the old habits of acquiring information are good habits. Your goal should be to support and supplement those good habits.

Seek out and use "creative practitioners" and "in-house experts" in the client system. They may supplant the need for more difficult acquisition outside the system. Also, overlooking their contributions could create antagonism.
Generate open but realistic expectations about the performance capabilities of the new information systems and services. They should not be oversold or undersold. Any resource should be approached with a realistic view of what it is capable of giving. People

who depend too heavily on one resource for a total solution to their problems are bound to be disappointed. The goal of this chapter has been to show how the acquisition of a variety of resources can be useful to the client system. They each have their own special purposes. When utilized in combination they can provide substantial impetus for the change process.

Assess the impact of past experience with resource retrieval on the prevailing attitudes in the client system about retrieval. Experience may have provided a greater sophistication about innovations and resources, but it also may have led to some disillusionment about the difficulties inherent in translating innovation experiences from one setting to another. The change agent may have to work hard initially to turn such expectations around, by demonstrating *successful* resource acquisition and by expanding the client's awareness of both resources and resource-acquiring strategies. Among other things, you should show your clients how creative use of *human* resources can assist and simplify the retrieval, translation, and adaptation of both *print* and *product*.

Demonstrate how acquiring resources can payoff by illustrations from successful cases. Reinforce the message that there is useful information "out there" which can be acquired.

Structure resource acquisition and teach clients how to structure resource acquisition so that they do not get lost in stacks of irrelevant or over technical data.

Localize resources wherever you can. The first law of information use is: People, print, and product resources of *high quality* should be made available locally wherever possible. The Internet and *social media* are very significant tools in resource acquisition since they make almost all people resources proximate.

Stage 3.5 SUMMARY

Stage 3 provides an overview of resource acquisition strategies for problem solving. The change agent and the client system must decide:
(1) how much time? (2) how much money? And (3) how much energy and effort?
Search must be weighed against desired goals of the project or program. Spending time, money, and energy on resource acquisition should always be based on a reasonably clear idea of why you are doing If you are too broad and loose in defining your needs and in defining relevance, you will be swamped with information you cannot use.
On the other hand, if you define your information needs too narrowly, you may overlook some of the critical facts that are required to make problem-solving and innovating effective and beneficial. The knowledge universe is expanding rapidly, so change agents and their clients need to develop the capacity to *plug in* and to *home in* on the contents of this universe whenever and wherever they need help.