

# Defining the desired change in capacity

## INTRODUCTION

The first step in building someone's capacity is identifying the change in behavior or practice that they need to make. This exercise allows participants to reflect on their current capacity using a rubric (the leadership competency framework rubric) that breaks down the overall question of leadership capacity into the common competencies that education leaders need to deploy in order to drive change. Participants are then asked to identify the specific changes in behavior they are going to prioritize, the barriers that are currently preventing them from making these changes, and the specific actions they need to take in order to overcome those barriers. The leadership competency framework rubric is available to download free at [www.deliveryinstitute.org/5A](http://www.deliveryinstitute.org/5A).

The key to this exercise is specificity. The more clearly each participant is able to articulate the specific changes or "critical moves" they need to make, the easier it is to work out what support they need to make those changes, and the more likely it becomes that they will make the change successfully.

Although the tools involved in this exercise can be used to conduct a general audit of leadership capacity, it is likely that you will want to prioritize those areas of capacity that are most critical to delivering on your system's goals. The exercise starts with a reaffirmation of the goals and a brainstorm discussion about the areas of capacity that most support delivery. You may choose to focus the exercise even more tightly by looking at only one or two competencies in the rubric.

This exercise is best conducted in groups of no more than 10 to allow full participation. For larger groups (more than 10) consider conducting the discussions in sub-groups with facilitators for each sub-group.

## OBJECTIVES

- Reaffirm our goals and consider the capacities we need to build in order to deliver on them
- Use the leadership competency framework rubric to self-assess our current individual capacity and identify the specific changes we need to make
- Identify the barriers that might be holding us back from making our desired changes
- Identify the actions we need to take in order to overcome barriers and make our desired change

## TIME

- 1 hour 40 minutes

## MATERIALS NEEDED

- Copies of rubric for each participant
- Handouts of the system's goals for each participant
- Markers
- Flipchart for taking notes



## INSTRUCTIONS

Time	Exercise instructions	Facilitator notes	Materials
10 minutes	<ul style="list-style-type: none"> <li>■ Facilitator outlines system/team goals.</li> <li>■ Discuss as a group: What skills, behaviors, and attitudes do we need to build in order to deliver on our goals?</li> <li>■ Capture on flipchart.</li> </ul>	<ul style="list-style-type: none"> <li>■ The aim here is to reaffirm <b>existing</b> goals. Use an official source (e.g. your delivery plan) to remind participants of your goals or give a reminder of system/team priorities.</li> <li>■ Focus the discussion on generating broad ideas for skills, behaviors, and attitudes that <b>the team</b> needs to develop to deliver on the goals. The discussion of individual needs will come later.</li> <li>■ Capture the ideas on a flipchart.</li> </ul>	<ul style="list-style-type: none"> <li>■ Slides or handouts with goals</li> <li>■ Flipchart</li> <li>■ Markers</li> </ul>
20 minutes	<ul style="list-style-type: none"> <li>■ Facilitator introduces the leadership competency framework rubric</li> <li>■ Individually: <ul style="list-style-type: none"> <li>– Read through the rubric.</li> <li>– Use the individual reflection worksheet at the end of the rubric to: <ul style="list-style-type: none"> <li>□ Rate yourself from 1 to 4 on each competency.</li> <li>□ Capture your strengths in each competency area.</li> <li>□ Capture the things you want to change in each competency area.</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Walk through the basic structure of the rubric, explain the 1 to 4 rating scale, and outline the next part of the exercise.</li> <li>■ <b>Note:</b> If you know in advance that you want to focus the group on one or two particular competencies (instead of using the whole framework) explain this now.</li> <li>■ <b>Note:</b> In this exercise participants are not asked to share their ratings. Depending on the group dynamic it may be appropriate to ask participants to share their ratings (e.g. by placing dots on a table you have drawn on a flipchart, or by using an online voting service like <a href="http://polleverywhere.com">polleverywhere.com</a>). You may also ask participants to share their ratings with a supervisor or coach. Whatever you decide make clear <b>at the start of the exercise</b> whether participants will be asked to share their ratings.</li> </ul>	<ul style="list-style-type: none"> <li>■ Copies of rubric for each participant</li> <li>■ Pens</li> </ul>
20 minutes	<p>In pairs:</p> <ul style="list-style-type: none"> <li>■ Discuss your <b>biggest takeaways</b> from the self-assessment – what stood out?</li> <li>■ Identify the <b>top 3 changes</b> each of you wants to make.</li> <li>■ Push each other to define your top 3 changes as <b>specific behaviors</b> and capture on your worksheets.</li> </ul>	<ul style="list-style-type: none"> <li>■ Assign pairs or – if appropriate – ask participants to choose a partner with whom they are comfortable talking openly.</li> <li>■ Remind participants that we are using the rubric as a tool to help us focus on our desired change – defining the specific change actually matters more the ratings we just did.</li> </ul>	<ul style="list-style-type: none"> <li>■ Copies of rubric</li> <li>■ Pens</li> </ul>



Time	Exercise instructions	Facilitator notes	Materials
5 minutes 10 minutes	<ul style="list-style-type: none"> <li>■ Share out as a group:               <ul style="list-style-type: none"> <li>– A few pairs share out examples of the changes they each identified.</li> </ul> </li> <li>■ Discuss as a group:               <ul style="list-style-type: none"> <li>– What sort of <b>barriers</b> might be holding us back from making the changes we identified?</li> <li>– Are these barriers                   <ul style="list-style-type: none"> <li>□ Matters of <b>skill</b>?</li> <li>□ Matters of <b>will</b>?</li> <li>□ Aspects of the <b>structures or environment</b> in which we work?</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ The share-out gives the group a brief opportunity to calibrate; there is no need for every pair to share out.</li> <li>■ Ask the group to be as specific and honest with themselves as possible in describing their barriers.</li> <li>■ Although there may be structural and environmental factors beyond the group’s control, set up the next part of the exercise by encouraging participants to focus on things they can influence themselves.</li> </ul>	
5 minutes 10 minutes	<ul style="list-style-type: none"> <li>■ Individually:               <ul style="list-style-type: none"> <li>– Think about the barriers that are preventing you from making your top 3 changes.</li> <li>– Think about the <b>action steps</b> you can take to address these barriers and the support you would need. In particular, think about:                   <ul style="list-style-type: none"> <li>□ Any <b>formal learning</b> you need.</li> <li>□ How you might seek out opportunities to <b>practice</b> the change.</li> <li>□ How you might build in opportunities to <b>reflect</b> on your learning.</li> </ul> </li> <li>– Capture your ideas on the worksheet.</li> </ul> </li> <li>■ In pairs:               <ul style="list-style-type: none"> <li>– Ask probing questions and suggest ideas to help your partner refine their action steps.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ This builds on the previous group discussion.</li> <li>■ In generating ideas for action steps, encourage participants to capture practical action steps that they know are available, but not to be completely limited by this.</li> <li>■ For example, in thinking about formal learning opportunities they should not limit themselves to the menu of professional development courses available in their organization. Could they go on an external course, or learn about the same skills from job shadowing, online learning, or reading a book?</li> </ul>	<ul style="list-style-type: none"> <li>■ Copies of rubric</li> <li>■ Pens</li> </ul>
10 minutes 10 minutes	<ul style="list-style-type: none"> <li>■ Share out as a group:               <ul style="list-style-type: none"> <li>– Everybody shares one change, one barrier and one action step.</li> </ul> </li> <li>■ Discuss as a group:               <ul style="list-style-type: none"> <li>– What are the next steps we need to take to support each other in making these changes?</li> <li>– Capture on flipchart.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Before you finish the exercise, make sure that the group’s expectations for follow-up activity are clear:               <ul style="list-style-type: none"> <li>– What are participants expect to do to take forward the action steps identified?</li> <li>– What will you/additional coaches and supervisors be doing by way of follow-up?</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ Flipchart</li> <li>■ Markers</li> </ul>