Technical Problems & Adaptive Challenges[1] Process & Tool

This document is designed to be a tool for schools or design teams during implementation as they determine how best to approach the various challenges that they encounter in implementing their plans for a school redesign. This approach is best facilitated by a trained coach.

Protocol & Process

Preparation Notes:
- Allow 50-60 minutes for this protocol to be successfully completed
- Ideally, groups should contain 4-12 people and have a set of working norms together
- In establishing groups, consider DEI: diversity (of identity and perspective), equity (of voice) and inclusion (ensuring all participants, including those of non-educator roles, are made welcome)
- Materials required include copies of this tool, a chart or white board and markers, sticky notes, and writing utensils.

5 minutes	**Brainstorm.** On sticky notes (one note per idea), staff should silently and individually brainstorm any current or anticipated challenges/problems arising from implementation, the change process, etc.
8 minutes	**Share.** On a whiteboard or chart paper, the group should share their ideas, by taking turns in a round bringing an urgent idea up to the board until all urgent challenges are included. Then, everyone should work to group together similar and related challenges.
12 minutes	**Sort.** The group should use the "Technical Problems and Adaptive Challenges" tool on the next page to determine which challenges are each type and rate the urgency for each of the challenges/problems identified.
10-15 minutes	**Delegate.** Any problems that the group identified as "Technical" should be assigned to a particular owner (who can be a member not in the group) to be tackled. This can be managed using an Action Planning Tool so as to note owners, deadlines, and other key considerations.
10-15 minutes	**Prioritize:** Any problems that the group identified as "Adaptive" should be considered more closely by the group. The group then should consider which *persons* (very rarely is an adaptive challenge "solved" by one person) should meet to unpack each of these challenges, and determine which of the adaptive problems have first priority. For each problem, the group should also identify an initiator who will work to convene those who will be unpacking and addressing the identified adaptive challenge.
5 minutes	**Debrief:** The group should reflect collectively on how today's process went, how individuals feel about the activity and its outcomes, and review next steps.

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[1] This tool and process is developed by CCE but is inspired by the concepts of adaptive challenges and technical problems introduced by Ron Heifetz in his book: Heifetz, Ron (1994). *Leadership without easy answers.* Cambridge, MA: Harvard University Press.

Technical Problems & Adaptive Challenges Analysis Tool
*To be utilized during the **Sort**, **Delegate**, and **Prioritize** steps of the above protocol.*

Definitions:
- Your problem is a **technical** one if all of the following are true:
  - it is focused on one particular area of your school,
  - an individual expert or small task force could solve the problem permanently if provided time and resources
  - most people would agree on the source of the problem
- Your challenge is an **adaptive** one if most of the following are true:
  - it has ramifications for multiple areas/stakeholder groups in the school
  - you're not sure where to start to unpack this complex issue
  - some people are in denial or do not wish to acknowledge it
  - solving this challenge will require changes in beliefs, attitudes, roles or relationships

Technical Problems			
Problem	**Urgency (hi, med., low)**	**Owner**	**Deadline**

Adaptive Challenges			
Challenge	**Priority (ranked)**	**Stakeholders to engage**	**Initiator**