

## How to design a change program: **The Changeology process** (v2 Feb 2011)

This is a methodical step-by-step process for designing programs that aim to tackle complex social, health and environmental problems. It's been co-evolved with many hundreds of practitioners who've developed their programs in Les's Enabling Change workshops over the past eight years.

It's informed by other methodical design models, especially:

### **Program logic**

For instance:

<http://www.uwex.edu/ces/pdande/evaluation/evallogicmodel.html>

### **PROCEED-PRECEDE**

For instance:

<http://www.ottawaheart.ca/UOHI/doc/CSW-Building.pdf>

### **Social Marketing**

For instance:

[http://socialmarketing.blogs.com/r\\_craig\\_lefebvres\\_social/2008/09/planning-a-social-marketing-program.html](http://socialmarketing.blogs.com/r_craig_lefebvres_social/2008/09/planning-a-social-marketing-program.html)

In the Enabling Change approach there are two levels of planning:

*A: Program level planning.* This defines your medium/long-term objectives for tackling a social, health or environmental problem. It is done once at the start of a program and then reviewed every few years.

*B: Project level planning.* This is how you design on-ground projects that engage people and decision-makers in changes that contribute to the longer-term objectives.

In the Enabling Change workshop, the process is supported by a suite of collaborative tools that allow multi-disciplinary teams to develop coherent plans together.

### **Who plans?**

The experiential gene pool of university trained professionals is far too narrow to ensure that change programs are well designed. It's therefore vital for lay members of the target audience<sup>1</sup> to participate in this planning process. The involvement of such external stakeholders has tremendous benefits. They are an essential reality check. They bring in valuable experiences, knowledge and perspectives that result in better design decisions. They can deliver great credibility to your program in the eyes of the community and gatekeepers. Most importantly, their participation is the single greatest factor in determining whether the work will be sustained once your funding runs out.



Good project development practice involves individuals from a mix of disciplines collaborating "on one page".

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<sup>1</sup> "Target audience" is not an ideal term since it suggests that the agency is the active player while the audience the passive player, which never the case. I prefer the term "actors".

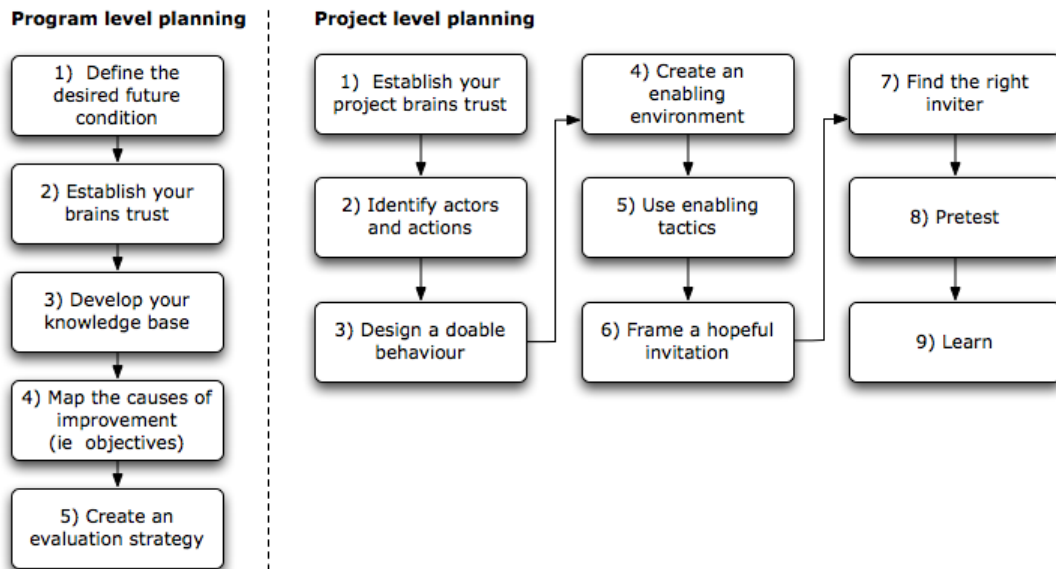


Diagram: The Enabling Change process. A single program may have several projects.

## A: Program level planning

It's vital to involve a diversity of stakeholders in this level of planning, for instance through a facilitated forum or workshop like that described at:

[http://www.enablingchange.com.au/How\\_to\\_make\\_a\\_theory\\_of\\_change.pdf](http://www.enablingchange.com.au/How_to_make_a_theory_of_change.pdf)

### Step 1: Define the future condition you want to contribute to

Start with an observable problem, then flip it into a "desired future condition". Agree on indicators so you can measure progress. Finally define your geographic boundary of your investment – one that matches your resources.

Example:

*Observable problem:* High use of private motor vehicles in Logan City.

*Desired future condition:* Reduced use of private vehicles in Logan City.

Indicator: • kms per head travelled by different modes.

### **Step 2: Establish your brains trust**

Convene a working party of advisory group with a diversity of experts, stakeholders and members of the target audience. Spend time getting them “on the same page”: invite them to share their assumptions about change and their definitions of success. Use this group to brainstorm your research agenda for Step 3.

### **Step 3: Develop your knowledge base**

Carry out thorough desk research on the problem and its causes; talk to people who have run similar programs; organise focus groups or informal discussions to find out what the target audience is saying about the problem and various solutions.

Assemble this knowledge into a book, presentation or briefing so all who subsequently participate in the program can be well informed.

### **Step 4: Map the “causes of improvement” and select intervention points**

Don’t assume that social, health or environmental problems are caused by the behaviour of one group of individuals. The institutional, human and physical context matters greatly. There are usually a host of players and groups whose practices, or lack of them, are contributing to the problem.

Use your brains trust + your knowledge base to map the “causes of improvement” and identify the intervention points where you can make the biggest difference with your available resources. These become your program objectives. Attach indicators and evaluation methods to each objective to create your program evaluation strategy.

For an example of a map of enabling factors, see:  
[www.enablingchange.com.au/Cycling\\_logic\\_model.pdf](http://www.enablingchange.com.au/Cycling_logic_model.pdf)

Example of program objectives:

Objective 1: Improve bus frequency to major employment centres. Indicator: number of buses per hour in peak to key centres.

Objective 2: Reduce free car parking at major employment centres. Indicator: number of all day free parking spaces at key centres.

Objective 3: Increase the number of students walking and bicycling to schools. Indicator: per cent changes of mode of travel to school.

### **Step 5: Create an evaluation strategy**

Now attach methods, baselines, targets to the indicators. Plan how you'll involve your brains trust in periodic evaluation workshops.

## **B: Project level planning**

Once you agree on measurable program objectives, you can move on to devising projects that contribute to those objectives.

Example:

A project to increase walking and cycling at four Logan City schools.

### **1) Establish your project brains trust**

Convene a small group or team of stakeholders and members of the target audience. Share your knowledge base with them and spend time sharing your respective assumptions as in step 2 above.

### **2) Identify actors and actions**

With your brains trust, map the potential actors. Identify a primary actor and supporting actors then specify the measurable behaviours you hope each one will adopt.

Note that it's vital to define both the actor and the action with concrete, measurable accuracy, so that a lay person would be able to imagine exactly who and what you mean (see the example below).

Example:

Primary actor: parents at the four schools.

Primary action: give written permission for children to walk or cycle to school.

Supporting actors: Logan City Director of Road Engineering; School Principals; supportive teachers.

### **3) Design the action or behaviour to maximise doability**

Don't accept the action or behaviour as a given. Instead do some social research. Spend time listening to the needs and concerns of potential actors and actively modify the desired action(s) to ensure they are the most compatible fit for their lives.

Consider ways to make them more beneficial, easier, quicker, with fewer hassles and uncertainties.

Note that at this stage you should be prepared to abandon your assumptions about what behaviours are appropriate. You may learn that innovators in that community have already adopted behaviours which are more effective in solving a particular problem. In that case you should learn from them.

Example:

Initial action: give permission for your children to walk or cycle to school.

Modified action: give *written* permission for your children to walk or cycle *on specified routes to school, after children qualify on safe walking/cycling skills programs.*

#### **4) Create an enabling environment**

The doability of a behaviour depends on the existence of a supportive environment. Audit the environment with the assistance of your brains trust and the potential actors. Use your brains trust to identify and prioritise achievable changes that are most likely to enable the desired behaviour.

Example:

- Council, school, P&C reps audit the safety of intersections, road signs and road markings on main walking/cycling routes to schools.
- Council carries out necessary improvement works to ensure safer routes.
- Principal establishes programs of safe walking and cycle skills for all students.

#### **5) Use enabling tactics**

Recognise that fear of the unfamiliar can destroy confidence in even highly able people. Use enabling tactics to increase people's comfort zones. Enabling tactics include:

- Familiarity (via modelling and hands-on learning)
- Autonomy (giving people free choice over whether and how they participate)
- Social proof (hearing/seeing similar others do it successfully)
- Being part of a purposeful group
- Clear goals and regular feedback
- Generous personal interactions, incentives, gifts
- Commitments/pledges
- Enjoyment

Examples:

- Parents and Citizens groups participate in auditing the safety of local routes and planning the project.
- Parents invited to help with cycling skills classes.
- Parents invited to join in a fun "Walk and Ride Wednesday".
- Parents hear inspiring presentations from parents at similar schools who have achieved progress, and have a chance to discuss their concerns with each other.

## **6) Frame your invitation around the actors' "hot hopes"**

Don't try to pressure people, convince them of facts, or use fear to persuade them to change.

Instead listen to the actors and imaginatively frame the new behaviour as a hopeful solution to real fears and frustrations they are experiencing in their lives.

Example:



Identified hot hopes: #1 = children's safety; #2 = children's health; #3 = children's educational performance.

Invitation: "Join the Safe Walking and Cycling to School program. It's about getting our kids to school safely so they're fit, healthy, and ready to learn."

## **7) Find the right inviter**

Who makes an invitation to act is more important than the invitation itself. Find a passionate-similar-connected-respected person to issue the invitation to act.

Example:

Pam Burgess, respected chair of Parents and Citizens group, whose daughter is a champion cyclist, will issue the invitation to parents.

## **8) Pretest**

Pretest your messages, stories, images and materials on representatives of the target audience(s) before you spend money on production.

## **9) Learn**

Put in place your evaluation methods before you launch your project. Collect data and stories as you go. Stand back and review the results at intervals, with a focus on lessons you can use to actively improve the project.

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The fictional example was based, in part, on the successful Tewantin TravelSmart program run by TravelSmart Queensland. See: <http://changemoments.blogspot.com/2009/08/walking-to-school-how-to-make-it-feel.html>