

Change Management Tools, Templates and References

Force Field Analysis (Lewin's Tool)

Description:

Force Field Analysis – originally developed by Kurt Lewin in 1951 – is a method for listing and weighing “driving forces” and “restraining forces” in a change process. It helps change facilitators identify factors that support a proposed change and those that hinder it, in order to strengthen the drivers and reduce the barriers. By visualizing change as a balance of forces, this tool aligns with Lewin's model of unfreeze–change–refreeze (preparing for change, making the change, and solidifying the new state) ifm.eng.cam.ac.uk. It is widely used in organizational change management to diagnose the situation and strategize interventions. For example, in adopting agroforestry, driving forces might include available subsidies and community interest, while restraining forces might include lack of know-how and upfront costs. Using Force Field Analysis, an advisor can collaboratively find ways to increase the driving forces and reduce the restraining forces, tipping the balance toward successful change.

Force Field Analysis is a structured tool to identify and compare the driving and restraining forces for a specific change, and is used to plan strategies for strengthening supports and weakening barriers to change.

Template Instructions:

- Draw a two-column table: one for 'Driving Forces' and one for 'Restraining Forces'.
- Brainstorm with stakeholders to list at least five forces in each column.
- Assign a weight (1-5) to each force to assess its impact.
- Discuss actions to strengthen driving forces or reduce restraining ones.

Kotter's 8-Step Process for Leading Change

Description:

Kotter's 8-Step Model – introduced by Harvard professor John P. Kotter in 1995 – provides a comprehensive roadmap for implementing change in organisations. The eight steps are:

- (1) Create a Sense of Urgency;
- (2) Build a Guiding Coalition;
- (3) Form a Strategic Vision and Initiatives;
- (4) Enlist a Volunteer Army (communicate the vision and gain broad support);
- (5) Enable Action by Removing Barriers;
- (6) Generate Short-Term Wins;
- (7) Sustain Acceleration (consolidate gains and keep moving);
- (8) Institute Change (anchor the new approaches in the culture) kotterinc.com

Kotter's framework expands on Lewin's simpler three-stage model by detailing specific actions that leaders should take to drive change and ensure it sticks. This model is especially useful for large-scale or organizational changes. Following these steps helps change agents avoid common pitfalls — for instance, establishing urgency



and building a coalition at the start prevents complacency, and celebrating short-term wins helps maintain momentum. Kotter's approach has become a widely cited guide for managing change effectively in businesses, communities, and various institutions.

Kotter's model is a step-by-step framework to lead change processes effectively, focussing on urgency, coalition-building, vision, empowerment, wins, and institutionalizing change.

Template Instructions:

- Create a table with eight rows – one for each step.
- Fill in actions, stakeholders involved, timeline, and indicators of success per step.
- Use for planning and tracking progress of a community or organizational change project.

Appreciative Inquiry (AI) – Strengths-Focused Change

Description:

Appreciative Inquiry is a participatory change approach pioneered by David Cooperrider and Suresh Srivastva in 1987 as a positive alternative to traditional problem-solving. Instead of asking “What’s wrong and how do we fix it?”, AI asks “What’s working well, and how can we build on it?”. It operates on the principle that every organization or community has strengths and successful experiences that can be the foundation for future growth. AI typically follows a 4D cycle:

Discovery (identifying what gives life – the best of what is);

Dream (envisioning what could be – a hopeful future);

Design (co-constructing the future – what should be);

Destiny/Delivery (sustaining the change – what will be) .

By engaging stakeholders in sharing success stories and envisioning an ideal future, Appreciative Inquiry generates enthusiasm, hope, and a shared vision for change. It contrasts with deficit-based approaches by focusing on opportunities and existing assets, which can increase motivation and collective buy-in. This strengths-focused methodology has been applied in organizational development, community change, and team building to unlock creativity and positive energy for change.

Appreciative Inquiry is a positive, strengths-based approach to change. It builds energy by focusing on what works well and co-creating a shared vision for the future.

Template Instructions:

- Interview individuals or groups using the 4-D cycle: Discover, Dream, Design, Deliver.
- Document key strengths and positive experiences (Discovery).
- Facilitate visioning conversations (Dream),
- Collaboratively plan actions (Design).
- Agree on commitments and follow-up (Deliver).



Resource Mapping (Asset-Based Community Development)

Description:

Resource Mapping is an asset-based approach to change, emphasizing identification of existing resources, capacities, and strengths in a community or organization. Popularized by John P. Kretzmann and John L. McKnight's work (1993) on Asset-Based Community Development (ABCD), this tool shifts focus from needs and deficiencies to assets and opportunities. In practice, resource mapping involves cataloguing all types of resources — human (skills, knowledge, local champions), natural (land, materials), social (groups, networks), institutional (programs, organizations), and financial assets — that can support the change initiative.

For example, a farming community mapping its assets might highlight knowledgeable locals, an unused plot for tree nurseries, active cooperatives, or existing grant programs. By creating a visual “map” or list of these assets, stakeholders often realize they have more to work with than they thought, building confidence and a sense of empowerment. Resource mapping (also known as community asset mapping) is typically done early in a change project to inform planning: it helps the group leverage what they already have and identify where external support is truly needed. This builds self-reliance and positive momentum for change, as people see that local strengths can be harnessed to achieve their goals.

Resource Mapping identifies local human, natural, social, and institutional resources to support change. Builds confidence by shifting focus from deficits to assets.

Template Instructions:

- Draw five resource categories: Human, Natural, Social, Institutional, Financial.
- Facilitate group brainstorming to list resources under each category.
- Create a visual map or chart for future use and planning.
- Use this map to identify which assets can support your initiative and where gaps exist.

Visioning Exercises (Guided Visualization and Future Visioning)

Description

Visioning Exercises are creative techniques that help stakeholders imagine a desired future state in vivid detail, making the abstract idea of change more tangible and inspiring. Rooted in practices of guided imagery and organizational development (e.g., “Preferred Futuring” outlined by L. Lippitt in 1998), these exercises engage people's emotions and imagination in the change process. Common visioning methods include guided visualization, where a facilitator asks participants to close their eyes and picture their community or organization years after a successful change (for instance, “Imagine your farm 10 years after adopting agroforestry – what do you see, hear, and feel?”). Others involve creating vision boards or drawings in small groups to depict the ideal future (“our village in 2030 if our project succeeds”). Scenario mapping or even role-playing a future success story (e.g., acting out a news interview after the change) are also forms of visioning. The purpose is to help participants articulate a shared vision and emotionally connect with it. By envisioning positive outcomes – greener landscapes, thriving farms, healthier communities – people can break out of present-day limitations and generate innovative ideas for achieving that future. Visioning builds a sense of possibility (“seeing is believing”) and can increase commitment to the change, as stakeholders have co-created a compelling picture of what they are working toward.



Visioning Exercise are tools to help stakeholders imagine a successful future and articulate a shared vision. Encourages creativity and emotional engagement.

Template Instructions:

- Use guided imagery: Ask participants to close eyes and visualize their future farm or village.
- Facilitate drawing or collage-making: Have groups depict their ideal future landscape.
- Summarize common themes into a vision statement.
- Display and use these visions to anchor change efforts.

References

Cooperrider, D. L., & Srivastva, S. (1987). "Appreciative Inquiry in Organizational Life." *Research in Organizational Change and Development*, 1: 129–169. (Foundational paper on Appreciative Inquiry.) Available via: Case Western Reserve Univ. (AI Commons) and other academic archives.

Kotter, J. P. (1995). "Leading Change: Why Transformation Efforts Fail." *Harvard Business Review*, 73(2): 59–67. (Introduces Kotter's 8-Step change model.) Available at: Harvard Business Review website hbr.org/hbr.org.

Kretzmann, J. P., & McKnight, J. L. (1993). *Building Communities from the Inside Out: A Path Toward Finding and Mobilizing a Community's Assets*. Evanston, IL: Institute for Policy Research. (Classic handbook on asset-based community development.) Available at: Internet Archive archive.org/archive.org.

Lewin, K. (1951). *Field Theory in Social Science*. New York: Harper & Row. (Origin of Force Field Analysis concept.) Available at: Institute for Manufacturing, University of Cambridge – "Force Field Analysis" (Summary) ifm.eng.cam.ac.uk/ifm.eng.cam.ac.uk.

Lippitt, L. (1998). *Preferred Futuring: Envision the Future You Want and Unleash the Energy to Get There*. San Francisco: Berrett-Koehler. (Guide to guided visioning and collaborative future planning.) Available at: Berrett-Koehler Publishers (book overview) bkconnection.com/bkconnection.com.

OUTCOMES OF THE COURSE MODULE

- Understanding of key change models (Lewin, Kotter, change curve)
- Strong communication and stakeholder engagement skills
- Practical tools to plan and support change processes

Get to know more!



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