

# ORGANIZATIONAL CHANGE UNIVERSAL SCREENER ASSESSMENT

*Lippitt-First Adaptive Version*

<p><b>PART 1</b> QUICK DIAGNOSTIC 6 items • 5 minutes <i>What symptoms are you seeing?</i></p>	<p><b>PART 2</b> TARGETED DEEP DIVE Based on your gaps <i>Where are the root causes?</i></p>
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An adaptive assessment: shorter for healthy organizations,  
deeper where you need it most.

<b>Name:</b>	
<b>Role:</b>	
<b>Date:</b>	

# How This Assessment Works

This diagnostic uses a two-part structure designed to be efficient and targeted:

## Part 1: Quick Diagnostic (Everyone Completes)

Six questions based on the Lippitt-Knostrer change model—a well-established framework for understanding why change efforts fail. These questions identify which foundational change elements may be missing.

## Part 2: Targeted Deep Dive (Based on Your Gaps)

For each element you rated 3 or below in Part 1, you'll complete a deeper assessment of the underlying organizational factors. This reveals whether your gaps stem from Culture (deep patterns), Climate (current conditions), or implementation Conditions.

## Why This Structure?

Organizations don't have unlimited time. If you're strong in an area, you don't need to dig deeper there. But where you're struggling, understanding root causes prevents the common mistake of treating symptoms instead of sources.

## RATING SCALE

<b>1</b> <b>Strongly Disagree</b> Rarely or never true	<b>2</b> <b>Disagree</b> Sometimes true	<b>3</b> <b>Neutral</b> Mixed or uncertain	<b>4</b> <b>Agree</b> Usually true	<b>5</b> <b>Strongly Agree</b> Almost always true
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**Important:** Rate how things actually are, not how you wish they were or how policies say they should be. Honest assessment produces useful data.

## PART 1: QUICK DIAGNOSTIC

Rate each statement based on your honest assessment of the organization. Circle one number per row.

#	Statement	1	2	3	4	5
1	We have a clear, shared understanding of what we're trying to achieve and why it matters.	1	2	3	4	5
2	Key stakeholders genuinely support our change efforts (not just publicly complying).	1	2	3	4	5
3	People have the knowledge and capabilities needed to implement changes successfully.	1	2	3	4	5
4	The benefits of changing outweigh the costs for those who must change their behavior.	1	2	3	4	5
5	We have adequate time, funding, and support to sustain this work.	1	2	3	4	5
6	We have clear next steps and accountability for making progress.	1	2	3	4	5

### What Gaps Produce:

VISION ↓ Confusion	CONSENSUS ↓ Sabotage	SKILLS ↓ Anxiety	INCENTIVES ↓ Resistance	RESOURCES ↓ Frustration	ACTION PLAN ↓ False Starts
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### YOUR PART 1 RESULTS

Transfer your ratings below. For any item rated 3 or below, check the box to indicate you need the deep dive:

Element	Your Score	Need Deep Dive?	Go To
1. VISION	_____	<input type="checkbox"/> Yes (if ≤3)	<a href="#">Section 2A</a>
2. CONSENSUS	_____	<input type="checkbox"/> Yes (if ≤3)	<a href="#">Section 2B</a>
3. SKILLS	_____	<input type="checkbox"/> Yes (if ≤3)	<a href="#">Section 2C</a>
4. INCENTIVES	_____	<input type="checkbox"/> Yes (if ≤3)	<a href="#">Section 2D</a>
5. RESOURCES	_____	<input type="checkbox"/> Yes (if ≤3)	<a href="#">Section 2E</a>
6. ACTION PLAN	_____	<input type="checkbox"/> Yes (if ≤3)	<a href="#">Section 2F</a>

**If all scores are 4 or 5:** Skip to the Summary Page. Your organization shows strong change readiness across all foundational elements.

## PART 2: TARGETED DEEP DIVES

Complete only the sections that correspond to your gaps from Part 1. Each section explores the organizational factors that produce that gap.

### Understanding the Three Layers:



**The Key Diagnostic Question:** *"If you got a new leader tomorrow, would this problem go away?"*

YES = Climate problem (dependent on current leadership). NO = Culture problem (embedded in how we operate).

## SECTION 2A: WHEN VISION IS WEAK

*Symptom: Confusion* — Complete this section if your Part 1 score for VISION was 3 or below.

#	Statement	1	2	3	4	5
<b>Strategic vs. Operational Balance [CLIMATE]</b>						
1	Leadership time is protected for strategic thinking, not consumed by daily operations.	1	2	3	4	5
2	We regularly step back to ask 'Are we doing the right things?' not just 'Are we doing things right?'	1	2	3	4	5
3	Long-term goals consistently guide short-term decisions.	1	2	3	4	5
<b>Diagnostic Clarity [CONDITIONS]</b>						
4	We distinguish clearly between problems requiring technical fixes versus adaptive change.	1	2	3	4	5
5	Before launching initiatives, we invest time in understanding root causes.	1	2	3	4	5
6	Our diagnosis of challenges is shared and understood across leadership.	1	2	3	4	5

### Section 2A Scores:

Element	Layer	Score (sum/15)
Strategic vs. Operational Balance	CLIMATE	____ / 15
Diagnostic Clarity	CONDITIONS	____ / 15

**Interpretation:** Your VISION gap is rooted in:  Culture (long-term work)  Climate (medium-term)  Conditions (immediate actions)

## SECTION 2B: WHEN CONSENSUS IS WEAK

*Symptom: Sabotage* — Complete this section if your Part 1 score for CONSENSUS was 3 or below.

#	Statement	1	2	3	4	5
<b>Relational Infrastructure [CULTURE]</b>						
1	People across the organization genuinely trust one another's intentions.	1	2	3	4	5
2	Relationships are strong enough to withstand honest disagreement.	1	2	3	4	5
3	When someone makes a mistake, others respond with curiosity rather than blame.	1	2	3	4	5
<b>Coalition Building [CONDITIONS]</b>						
4	We identify and actively engage key influencers beyond formal leadership.	1	2	3	4	5
5	Skeptics are brought into dialogue early rather than worked around.	1	2	3	4	5
6	We have a clear coalition of people committed to making change succeed.	1	2	3	4	5
<b>Undercurrents [CULTURE]</b>						
7	Important concerns get raised openly rather than circulating as hallway talk.	1	2	3	4	5
8	People say what they really think in meetings, not just afterward.	1	2	3	4	5
9	Underground resistance to initiatives is addressed rather than ignored.	1	2	3	4	5

### Section 2B Scores:

Element	Layer	Score (sum/15)
Relational Infrastructure	CULTURE	____ / 15
Coalition Building	CONDITIONS	____ / 15
Undercurrents	CULTURE	____ / 15

**Interpretation:** Your CONSENSUS gap is rooted in:  Culture (long-term work)  Climate (medium-term)  Conditions (immediate actions)

## SECTION 2C: WHEN SKILLS IS WEAK

*Symptom: Anxiety* — Complete this section if your Part 1 score for SKILLS was 3 or below.

#	Statement	1	2	3	4	5
<b>Learning Architecture [CULTURE]</b>						
1	We regularly examine our assumptions and practices, not just our outcomes.	1	2	3	4	5
2	When something isn't working, we ask 'What might we be wrong about?' not just 'Who's not doing it right?'	1	2	3	4	5
3	Professional learning translates into actual changes in practice.	1	2	3	4	5
<b>Collective Capability [CULTURE]</b>						
4	We believe together we can solve problems that no individual could solve alone.	1	2	3	4	5
5	Teams regularly accomplish things that exceed what individuals contribute.	1	2	3	4	5
6	There's a genuine sense that 'we can figure this out' when facing challenges.	1	2	3	4	5

### Section 2C Scores:

Element	Layer	Score (sum/15)
Learning Architecture	CULTURE	____ / 15
Collective Capability	CULTURE	____ / 15

**Interpretation:** Your SKILLS gap is rooted in:  Culture (long-term work)  Climate (medium-term)  Conditions (immediate actions)

## SECTION 2D: WHEN INCENTIVES IS WEAK

*Symptom: Resistance* — Complete this section if your Part 1 score for INCENTIVES was 3 or below.

#	Statement	1	2	3	4	5
<b>Operating Norms [CULTURE]</b>						
1	The informal rules about 'how things work here' support rather than undermine our goals.	1	2	3	4	5
2	What gets rewarded and what gets punished aligns with what we say we value.	1	2	3	4	5
3	New initiatives fit with (or intentionally challenge) existing ways of working.	1	2	3	4	5
<b>Energy &amp; Morale [CLIMATE]</b>						
4	People bring genuine enthusiasm to their work, not just compliance.	1	2	3	4	5
5	There's a sense of optimism that our efforts will lead somewhere meaningful.	1	2	3	4	5
6	Fatigue or burnout, when present, is acknowledged and addressed.	1	2	3	4	5
<b>Adult Engagement [CLIMATE]</b>						
7	Staff feel ownership over their work, not just responsibility for tasks.	1	2	3	4	5
8	People are treated as professionals with judgment, not workers needing monitoring.	1	2	3	4	5
9	There are genuine opportunities for voice and influence on decisions that affect people.	1	2	3	4	5

### Section 2D Scores:

Element	Layer	Score (sum/15)
Operating Norms	CULTURE	____ / 15
Energy & Morale	CLIMATE	____ / 15
Adult Engagement	CLIMATE	____ / 15

**Interpretation:** Your INCENTIVES gap is rooted in:  Culture (long-term work)  Climate (medium-term)  Conditions (immediate actions)

## SECTION 2E: WHEN RESOURCES IS WEAK

*Symptom: Frustration* — Complete this section if your Part 1 score for RESOURCES was 3 or below.

#	Statement	1	2	3	4	5
<b>Sustained Execution [CONDITIONS]</b>						
1	We protect implementation from the 'initiative of the month' syndrome.	1	2	3	4	5
2	When obstacles arise, we problem-solve rather than abandon ship.	1	2	3	4	5
3	There's genuine follow-through on commitments, not just launch enthusiasm.	1	2	3	4	5
<b>Systems Integration [CONDITIONS]</b>						
4	Our various initiatives and systems work together rather than compete.	1	2	3	4	5
5	Changes in one area account for ripple effects in other areas.	1	2	3	4	5
6	We actively manage the portfolio of initiatives to prevent overload.	1	2	3	4	5

### Section 2E Scores:

Element	Layer	Score (sum/15)
Sustained Execution	CONDITIONS	____ / 15
Systems Integration	CONDITIONS	____ / 15

**Interpretation:** Your RESOURCES gap is rooted in:  Culture (long-term work)  Climate (medium-term)  Conditions (immediate actions)

## SECTION 2F: WHEN ACTION PLAN IS WEAK

*Symptom: False Starts* — Complete this section if your Part 1 score for ACTION PLAN was 3 or below.

#	Statement	1	2	3	4	5
<b>Psychological Safety [CLIMATE]</b>						
1	People feel safe to raise concerns without fear of negative consequences.	1	2	3	4	5
2	Mistakes are treated as learning opportunities rather than occasions for blame.	1	2	3	4	5
3	It's safe to say 'I don't know' or 'I need help' without losing credibility.	1	2	3	4	5
<b>Tension &amp; Pushback [CLIMATE]</b>						
4	Disagreement is seen as productive rather than disloyal.	1	2	3	4	5
5	We can have difficult conversations without damaging relationships.	1	2	3	4	5
6	Constructive conflict leads to better decisions rather than ongoing resentment.	1	2	3	4	5
<b>Transformation Scorecard [CONDITIONS]</b>						
7	We track leading indicators (early signs), not just lagging outcomes.	1	2	3	4	5
8	Progress measures are used for learning, not just accountability.	1	2	3	4	5
9	We regularly check: Is this working? What are we learning? What should we adjust?	1	2	3	4	5

### Section 2F Scores:

Element	Layer	Score (sum/15)
Psychological Safety	CLIMATE	___ / 15
Tension & Pushback	CLIMATE	___ / 15
Transformation Scorecard	CONDITIONS	___ / 15

**Interpretation:** Your ACTION PLAN gap is rooted in:  Culture (long-term work)  Climate (medium-term)  Conditions (immediate actions)

# SUMMARY: YOUR ORGANIZATIONAL PROFILE

Transfer your results from both parts to see your complete picture:

## Part 1 Overview:

Change Element	Score	Status	If Weak →
VISION	_____	<input type="checkbox"/> Strong <input type="checkbox"/> Gap	Confusion
CONSENSUS	_____	<input type="checkbox"/> Strong <input type="checkbox"/> Gap	Sabotage
SKILLS	_____	<input type="checkbox"/> Strong <input type="checkbox"/> Gap	Anxiety
INCENTIVES	_____	<input type="checkbox"/> Strong <input type="checkbox"/> Gap	Resistance
RESOURCES	_____	<input type="checkbox"/> Strong <input type="checkbox"/> Gap	Frustration
ACTION PLAN	_____	<input type="checkbox"/> Strong <input type="checkbox"/> Gap	False Starts

## Part 2 Deep Dive Results (completed sections only):

Element	Layer	Score	Interpretation
Strategic vs. Operational Balance	CLIMATE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Diagnostic Clarity	CONDITIONS	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Relational Infrastructure	CULTURE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Coalition Building	CONDITIONS	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Undercurrents	CULTURE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Learning Architecture	CULTURE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Collective Capability	CULTURE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Operating Norms	CULTURE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Energy & Morale	CLIMATE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Adult Engagement	CLIMATE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Sustained Execution	CONDITIONS	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Systems Integration	CONDITIONS	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Psychological Safety	CLIMATE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Tension & Pushback	CLIMATE	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong
Transformation Scorecard	CONDITIONS	_____ / 15	3-6: Critical   7-10: Developing   11-15: Strong

### Key Insights:

1. My primary gaps are in (circle): CULTURE / CLIMATE / CONDITIONS
2. The Lippitt element I most need to address: \_\_\_\_\_
3. The root cause is primarily: \_\_\_\_\_
4. One action I can take in the next 30 days: \_\_\_\_\_

## What to Do With These Results:

- **Culture gaps** require long-term, consistent work. Don't expect quick fixes. Focus on modeling, norms, and repeated practice.
- **Climate gaps** can often be addressed more quickly through leadership behavior, communication, and immediate environmental changes.
- **Conditions gaps** are implementation mechanics—often the quickest to address but won't stick without Culture and Climate support.

**Remember:** Culture enables Climate enables Conditions. Working on Conditions while ignoring Culture is like building on sand.