Leading Organizational Change: Seven Steps to Success

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SEPTEMBER 19, 2011
PRIMARY REFERENCE

“Managing Transitions: Making the Most of Change”
by William Bridges
De Capo Lifelong Books, 2009

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Small group discussion

What change are you facing?

• Break into groups of four
• Name a change facing your organization
• Share one thing that might be particularly tough or challenging about managing that change
• Ten minutes
Transition
- Experience
- Psychological
- Process based
- Gradual and slow

Change
- Events
- Situational
- Outcome - focused
- Relatively quick
Transition – Coming to Terms with Change

The New Beginning:
Commitment, Rebirth, New Energy, New Sense of Purpose

The Neutral Zone:
Confusion, Anxiety, Direction Finding, Re-patterning

The Ending:
Loss, Letting Go... Relinquishing Old Way, Old Identity

Source: William Bridges
SEVEN STEPS TO SUCCESS
One: Connect the change to the bigger picture

- Your strategic vision
  - Major changes are best be done in the context of strategic planning
- A problem to be solved, e.g., overcoming a barrier to client satisfaction or staff efficiency

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Two: Create a detailed change plan

- Assign the “change team” leader & the team members
- Create the workplan – the specific steps to designing the change & the timeline
- Allocate resources – staff time, funding, outside expertise, if needed
Three: Get input on the planned change from affected parties

- Sources of input:
  - Staff, clients, volunteers, board, funders

- Venues for input:
  - Online survey—maybe anonymous
  - Group interviews
  - One-on-one interviews with a sample

- When
  - At critical points in the development of the change
Four: Get endorsements from leadership

- Board, when appropriate
- Executive Director
- Department Head
- Other?
*Five: Communicate, Communicate, Communicate*

- At the roll out of the planning process provide information to affected parties on:
  - leader & team members
  - workplan & timeline
  - who will have input & how
  - what’s changing & what’s not changing

- Provide regular progress reports
Six: Facilitate the staff “transition”

- Provide a forum(s) for staff to process their reactions to the change
- Be empathic with and “normalize” their reactions
- Help them move from letting go of the old to excitement for the “new beginning”
- Understand that staff move through the transition phases at different speeds

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Seven: Be the “container”

- Exude confidence, calm, empathy
- Present a clear vision of the “new beginning”
- Give space to staff reactions
- Process your own anxieties within your personal support network
Small group discussion

Creating your change plan

• Fill out your “Change Management Plan”
• Share your plan in your group of four
• Note themes and questions that emerge in your group
• Be prepared to share a theme or question with the full group
• 20 minutes

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Please Fill Out Your Evaluations

Session Objectives

• Learn basic techniques for successfully moving your organization through a significant change
• Understand the importance of addressing the transition side of change, i.e., staff reactions to change
• Outline a partial plan for managing a change

Session Materials and Additional Resources available at:
www.compasspoint.org/nonprofitday

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