

ROADMAP TO INCLUSION

A Guide to Change Management
for Service Agencies



WORKBOOK



Acknowledgment

Our thanks to
John Policicchio,
Executive Director
Community Living Algoma

For his time,
insights and advice
generously provided
to the author

© 2018, Ontario Disability Employment Network

Author: Peter de Jager & Company
pdejager@technobility.com www.vimeo.com/technobility

Roadmap to Inclusion: A Guide to Change Management for Service Agencies
ISBN: 978-1-7752655-0-4

Preface

This workbook is designed to provide a detailed roadmap to guide an organization through a specific—and unique—transformational Change.

The challenges to accomplishing this are many. Even agreeing on the starting point for the discussion poses its own challenges.

- **If we start by defining the Change, then we're presupposing that everyone agrees the Change is necessary and that it is the correct Change to consider out of all the possible.**
- **If we start by focusing on the existing situation, or the status quo, then some might perceive that we're critical of existing practices.**

If we ignore these two considerations by jumping directly to “Here's what we must do,” then we're guilty of presuming we know best, which is a poor start to any Change initiative.

In his work *The Prince*, published in 1532, Machiavelli wrote about leading Change.

“*There is nothing more difficult to take in hand, more perilous to conduct, or more uncertain in its success, than to take the lead in the introduction of a new order of things.*”

He continues to explain why this is so;

“*For the reformer has enemies in all those who profit by the old order, and only lukewarm defenders in all those who would profit by the new order, this lukewarmness (sic) arising partly from fear of their adversaries... and partly from the incredulity of mankind, who do not truly believe in anything new until they have had actual experience of it.*”

Although the quotation is almost 500 years old, it still has immense value to anyone contemplating significant Change in any organization.

We have not defined Change. And we have not criticized the status quo. But, the option of remaining with the current Sheltered Workshop approach to the services offered no longer exists. The provincial government has decided to move away from Sheltered Workshops and we must respond to their new vision of the future.

Irrespective of the government's mandate, society's perspective on developmental disability has been evolving, supported in many ways by those whose daily work is in providing supports and services to this demographic. The move away from segregated and congregated support models has been underway for over three decades. In many ways, the current government decree is simply ratifying what is already underway with the additional encouragement of a deadline.

Let's begin to think about Change with a simple exercise.

This workbook offers an opportunity to actively participate in creating the Roadmap for Change. The first steps on that roadmap begin here.

Over the past month, how many places did you visit and how many options did you have each time you chose where to go?

Some examples to get you started;

My wife and I went out to breakfast twice, but we have about five places we visit from time to time.

Stores? About ten visits – Too many options to list

Coffee shops? Three to five visits – Too many options to mention

Parks? Three visits – About a dozen local choices

Friends? Three visits – Half a dozen local relationships

Bookstores? Two visits – A dozen that I frequent on a regular basis

Relatives? Two visits – More than two dozen within a 100-km radius

Movies? One movie – Half a dozen cinemas in our area

Restaurants? Two visits – Too many options to list

Other places I could have visited if I'd wanted to: museums, festivals, farmers' markets, sports events, the theatre, science museum, winery tour and the list goes on.

Now use the work page to list your places. Your list will be unique to you.

Perhaps you believe completing this exercise, writing down the places you've been is redundant. But the act of writing—making lists, putting your thoughts on paper—forces us to think more deeply than usual. Taking the time to complete this exercise is good practice for the upcoming, more-demanding exercises.

You may copy the blank form on the next page if you don't want to write in the book itself.



Where have I been, and where could I have gone last month?

Type of location	I visited...	The options I had

Now for the next part of the exercise. Think of a specific person you support and complete the same form for that person.

Or, you could extend the exercise and select six people you support and perform this exercise for all of them.

One of the ways we measure our quality of life is our ability to do what we want, when we want. Our quality of life can be adversely affected by many things. Our health can make certain activities impossible for us. Our economic status also affects our enjoyment of life. For example, can we afford to do what we'd like to do? Then there's the aspect of life most people take for granted: being able to make both small and large decisions for ourselves. This exercise is intended to highlight that last aspect, more than any of the others.

“*Being part of a community seems like such a “natural” thing. Yet, as the experience of those involved in supporting this work can attest, supporting people who are isolated into community does not just happen “naturally”. There are aspects of this work that challenge us to rethink our roles and our commitments to the people we care about. Building connections is intentional, strategic and purpose driven.*”

Belonging to One Another: Building Personal Support Networks.
Community Living British Columbia

<http://www.communitylivingbc.ca/wp-content/uploads/Belonging-To-One-Another-final.pdf>

Where has the person I support been, where could they have gone last month?

*Try to approach this on an individualized basis. Don't include group outings or field trips with others you support.

Type of location	They visited...	The options they had	Who decided for them?

When you compare these lists, note the differences.

They are different for many reasons, and there are many more arguments for why they cannot, even should not, be the same.

Your first list is a snapshot of someone who lives within a community, and the other is that of someone living at the edge of community looking in, or perhaps even unaware of what is possible. Is it possible to create a situation where these lists match more closely?

In 1994, Community Living Algoma (www.communitylivingalgoma.org) supported about 150 individuals in their Sheltered Workshop programmes. In 2017, they had zero people remaining in those programmes. All 150 individuals had been integrated in their community. That is 150 people whose lists of where they visit, their choices of exploration and life experiences, their connections to their own personal circle of friends, acquaintances and chance encounters with strangers are indistinguishable from everyone around them.

Being part of community is crucial to who we are. We are first and foremost social animals. We need to be with others. We know this intuitively because the need to be part of a community is embedded within us. Whether it is in the unstated need for human touch, the power of a hug, or a passing nod of recognition, being part of community keeps us sane.

Our thought leaders know this:

“*We humans want to be together. We only isolate ourselves when we’re hurt by others, but alone is not our natural state. Today, we live in an unnatural state—separating ourselves rather than being together.*”

Margaret Wheatley, 2002

The vision that sustains Community Living Algoma is this, *“That all people live in a state of dignity in their community, where they can access supports needed to ensure full inclusion”*

The goal of this workbook, simply put, is to place our feet firmly on the path towards community.

We’ll begin that journey now.

Table of Contents

Preface	3
The Steps Before the First Step.....	10
Understand Change in General.....	18
Virginia Satir – Change Process Model.....	19
1. The Status Quo	21
2. Foreign Element	25
3. Threat Analysis.....	28
4. Resistance	31
5. Denial	33
6. Chaos	34
7. Integration	36
8. New Status Quo	37
Understand Your Specific Change.....	38
Establish Rapport.....	49
Understanding the Status Quo.....	53
Create a Desire to Change.....	57
Desire becomes Action.....	62
Reinforce New Behaviours.....	66
Create Closure.....	70
The Communication Plan.....	72
The Seven Questions of Change.....	73
The First Steps Forward.....	77
In Closing.....	86
APPENDICES.....	87
About the Author – Peter de Jager.....	91

The Steps Before the First Step

This workbook assumes you agree that society's perceptions of those with a developmental disability has evolved over time, that there is a stage beyond Sheltered Workshops and that moving to a stage where community reunites with all its members is a desirable goal. Based on that assumption, you will use this workbook as a guide for bringing others towards that vision. The guide will contain arguments in favour of taking the journey, but that is not the primary goal.

The question before us is simple enough: How do we move our organizations and communities, from the current normality of some form of Sheltered Workshop, or similar congregated care model, towards full community inclusion?

How should we implement ANY Change? A simple enough question that must have a simple answer. After all, every time we implement a new system or install a new process, we're implementing Change. Some steps work and some steps fail. It is your role to sift out the good from the bad.

First, let's understand how Change Implementation affects the target audience. Effective Change implementation requires that you

- **Make it their Change not your Change**
- **Provide support during the transition**
- **Celebrate small successes**

These points seem to be common sense, which may be why they are often overlooked. But we must pay attention to these simple observations. We ignore them at our own peril.

When faced with Change—any Change—the immediate response is “How will this affect me?” Will it destroy a way of life or just disrupt a sense of comfort? Will it put my child at risk or is that a mistaken belief? Will it reduce our effectiveness, or will it just be **perceived** as threatening our ability to deliver the services we value? Does it matter, in terms of how people respond to the proposed Change, if it is a perception rather than reality?

Everyone shares these simple, personal, self-preserving questions. Answer them and you've solved the problem of implementing Change. Ignore them and you guarantee yourself a difficult, if not impossible, transformation.

There is no easy path for Change Management. The Change strategy depends on the present situation, the history, the future you are trying to create and how difficult you make the journey from here to there. For that last point, your ability to communicate well during a change can make the journey easier.

If you're trying to get a target audience to accept a new way of doing things, a new system or a new set of standards, then there are some solutions. Solutions that will allow the target audience to gain some control over their destiny while implementing the necessary Changes.

Contemplating changing a situation can lead to a powerful desire to simply begin implementing the Change. But, without a plan of action or consideration for how people will respond when Change is thrust upon them, that course of action will create unnecessary problems.

The Change you are about to embark on is large, complicated, controversial to many, disruptive to existing belief systems and will generate strong resistance. With so much at stake, it is necessary to move slowly and take the time to fully understand the goals we need to accomplish.

The key here is that life becomes difficult when we decide to take the lead. It is worth repeating the Machiavelli quote from the Preface:

“*There is nothing more difficult to take in hand, more perilous to conduct, or more uncertain in its success, than to take the lead in the introduction of a new order of things.*”

Let's start with a simple example;

Think back to when you were a child and you first noticed another child riding a bicycle. The thing that caught your attention was likely how fast the child could ride, and that they could move that fast without the involvement of an adult.

To you, this brought one word to mind: freedom. At that point, you decided **for yourself** that you wanted to ride a bicycle. When you finally got your bike and rode it for the first time, you probably fell. You might have even cut yourself in the process. That was irrelevant. You wanted to learn to ride a bike and nothing was going to stop you. You got back up and you continued getting back up until you'd mastered the art of riding a bike.

In short, you decided, **on your own**, to embrace a meaningful Change, even though it involved a painful process. And we all continue to do this, all the time. We will embrace and sacrifice for a Change that **we** think is necessary or important to us.

Now consider a related experience. Have you ever decided that a child should learn how to ride a bike even though the child had no desire to ride a bike? If you have attempted this, then you the perilousness and uncertainty that Machiavelli talked about. In all likelihood, your attempt at Change played out with the child falling, crying and saying to you, "I told you this wouldn't work!"

This simple example contains an important lesson. We will embrace Change willingly, when it's **our own** idea. When it is not, then the Change will become difficult, if not impossible, to accomplish.

The Change you are about to initiate—moving from Sheltered Workshops to Community Inclusion—is considerably more difficult than learning to ride a bike. But the simple example provides an opportunity to ask how to begin the journey.

Here is the Methodology we're going to follow in this workbook as we attempt our journey:

1. **Understand Change in General**
2. **Understand Your Specific Change**
3. **Establish Rapport**
4. **Understand the Status Quo**
5. **Create a Desire to Change**
6. **Transform Desire into Action**
7. **Reinforce New Behaviours**
8. **Create Closure**
9. **A Template for Communicating Change**

This list is an overview of what is covered in this workbook. After working through the workbook, you will discover a list of questions in Section 9 (pg. 73). These are questions we must answer to the satisfaction of the people who will be affected by the Change.

1. **WHY is this Change necessary?**
2. **WIIFM - What's in it for me?**
3. **WHAT will I be doing differently on Monday?**
4. **What WON'T Change?**
5. **What MIGHT go wrong?**
6. **What WILL hurt?**
7. **SIGNPOSTS—or how will we measure our progress?**

If this all seems complicated and detailed, it is. It needs to be as complicated and challenging as the Change we are trying to accomplish.

Before we look at some Change models, let's consider Changes you've experienced in the past. Past Change, both good and bad, contains lessons that we can examine and learn from.

Post-Mortem of a Bad Change

For this exercise, identify a Change, preferably one in an organizational context, that was deemed either a failed implementation or a very difficult implementation.

Provide a brief description of the Change.

In what way was it a failure, or how did you know it was difficult?

In your opinion, what were the top three reasons the Change failed?

1. It failed/was difficult because:

2. It failed/was difficult because:

3. It failed/was difficult because:

Who resisted the Change and why?

Who supported the Change and why?

Looking back, what is one thing you could have done to make that Change implementation better?

Post-Mortem of a Good Change

For this exercise, identify a Change, preferably one in an organizational context, that was deemed either a successful implementation, or a surprisingly easy implementation.

Provide a brief description of the Change.

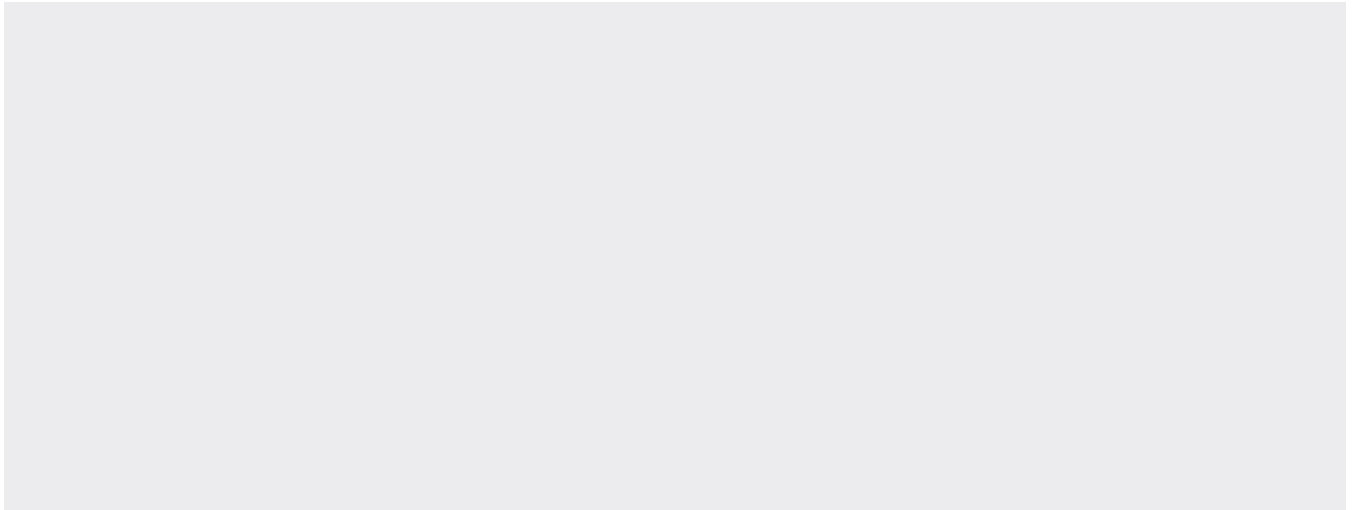
In what way was it a success, or how did you know it was easy?

In your opinion, what were the top three reasons the Change succeeded?

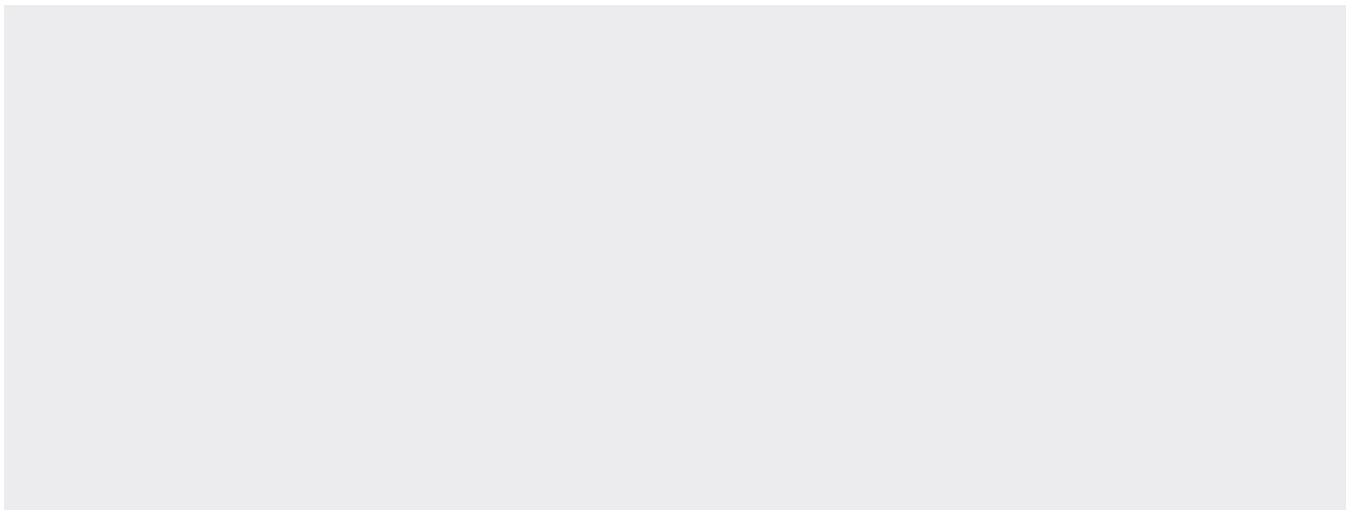
1. It was successful/easy because:

2. It was successful/easy because:

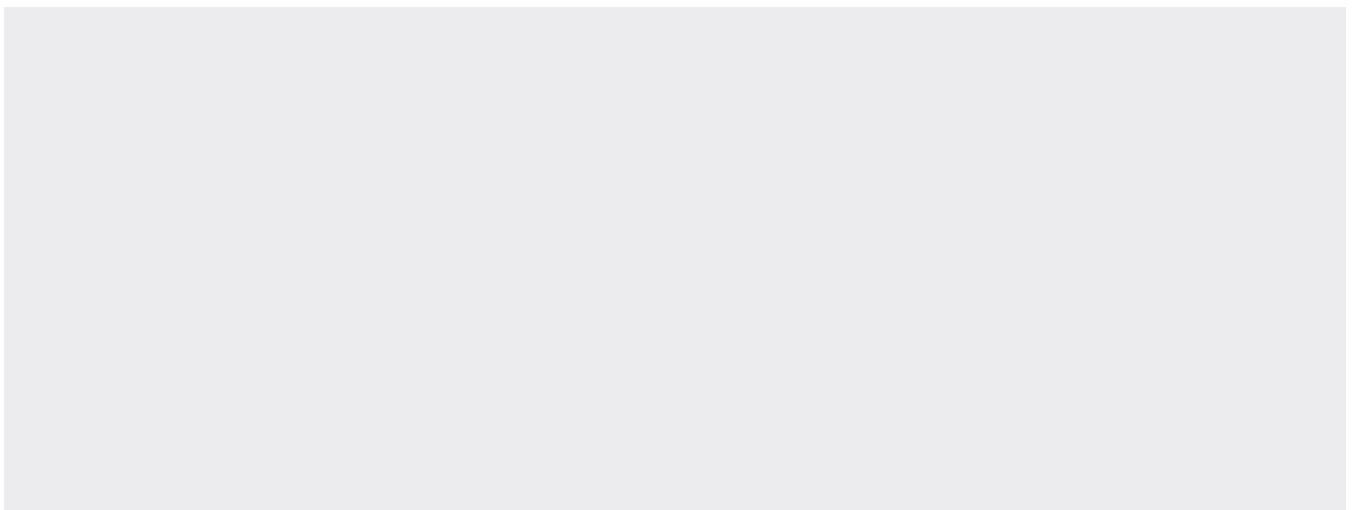
3. It was successful/easy because:



Who resisted the Change and why?



Who supported the Change and why?



A Commentary on the Post-Mortems

Every failure, every success, each contains beneficial lessons. But you must look back to examine them for the valuable resources they are.

The Changes you just examined are unique to you. But because people respond to Change consistently from organization to organization, they likely fell within the typical pattern of responses.

The top reasons given for failed Change, in descending order, are as follows:

1. **Top-down dictated Change** – When upper management decides, without consultation, what should Change and tells everyone else to Change.
2. **Bad planning** – Where the consequences of the Change are not thought through and the Change results in negative consequences.
3. **Bad communication** – Where details, timings, consequences and responsibilities are either not communicated, or communicated poorly.

The reasons for successful Change are the mirror image of those generated for failed Change.

1. **Involvement by all stakeholders** – The more deeply people are involved with decisions surrounding Change, the more likely Change will occur smoothly.
2. **Detailed planning** – Made possible by the involvement of all interested parties.
3. **Good communications** – Facilitated by the willingness of all involved to participate in the communication process, especially when it comes to seeking out clarification.

The lesson here is that **Change fails or succeeds based on predictable and known reasons.**

In other words, before we embark on a Change, we already know how to increase or decrease the possibility of success.

This workbook is a tool to help increase the possibility of success.

Understand Change in General

Before embarking on a specific Change, it is essential to understand how people respond to Change, just as we need to understand arithmetic before starting to plan an organizational budget. This section will cover common pitfalls in Change Management.

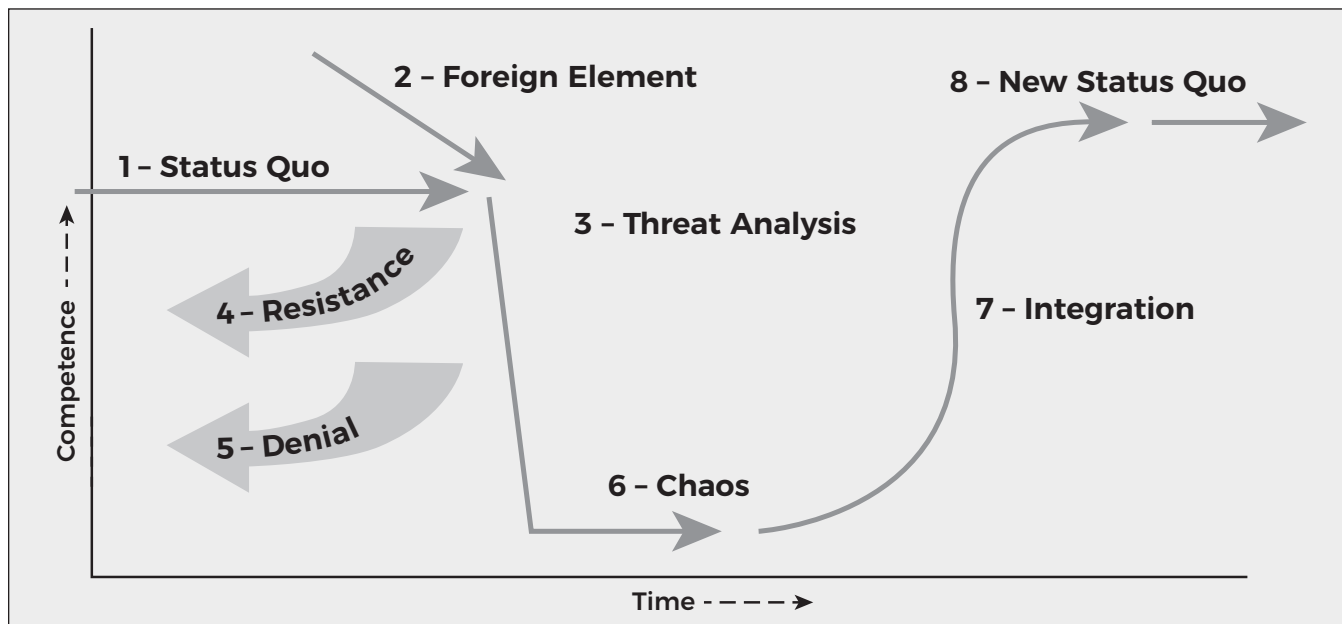
Unfortunately, it is common to embark on changes, especially on massive changes, without considering how people respond to Change. Here are some points to consider that reflect the reasons for failure or success found on the previous page:

- 1. People don't respond well to being told what to do without explanation.**
- 2. If we are told change is necessary, we prefer to be told by someone we trust rather than a stranger.**
- 3. Change isn't an event that happens to us; it is a process that we must thoughtfully traverse.**

These are simple concepts that managers know. Unfortunately, these ideas seldom factor into planning or processes during Change, leaving managers to appear they aren't good at implementing Change. As evidence, simply look back at the exercises you just completed for good and bad Change post-mortems. For which category was it easier to find examples: Bad Change or Good Change? Most likely it was easier to recall examples of bad Change initiatives. Good Change initiatives do exist, but they aren't the norm.

The next section of the workbook delves deeper into understanding Change in General. Once you gain a full understanding of the Virginia Satir Model of Change Management, you will be able to approach the challenge facing the Sheltered Workshop operators.

Virginia Satir – Change Process Model



It's a Process

Some common definitions or descriptions of Change fall along the lines of “When things become different” or “When things are no longer the way they once were.”

Those are good starting points, but an expanded description will be required if things are changing daily or if the Changes are extreme. Those brief sentences alone cannot provide a foundation for positive Change.

The first premise behind Satir’s work is: **Change is not an event, it’s a process.** Her assumption is that taking time to understand the Change process enables us to become more adept at changing and implementing Change.

Another premise central to her thinking, is that **people will go to great lengths to protect their Status Quo from unnecessary Change.**

Look at the graph above. The horizontal axis represents the passage of time. The vertical axis can plot several concepts; for example, Satir originally plotted Self-Esteem here. But for organizational Change, consider this axis as representing either Competence or Productivity, a second cousin to competence.

Competence, within the context of this model, is an extension of our normal understanding of the word. It includes what we know and our ability to perform effectively. It also includes our comfort level at that point in time.

It’s worth pointing out that in any discussion of competence, sooner or later the concept of **incompetence** needs to be included. The term seems objectionable as it has come to imply a level of mean-spirited judgment. But the term is, especially within the context of this model, merely an assessment of skill level, nothing more. For example, a skilled auto

mechanic is likely an incompetent brain surgeon. And a brilliant brain surgeon may be an incompetent speaker of French. Here, **incompetence** is not an offensive assessment, merely a statement of fact.

Moving from a comfort zone—an area of proven competence—means becoming incompetent. Because Change means moving to something new, forcing us out of our comfort zone and into incompetence. Fortunately, incompetence is a temporary state.

In summary, the model depicts that during a time of Change, competence starts out level, drops to practically zero (Incompetence = not knowing how to do something), climbs up the familiar learning or 'S' curve and then levels off again as we acquire new competencies.

Two points about the graph to keep in mind. First, it is not drawn to scale. That is, the graph cannot be used to determine that someone should respond in a certain way for a specific period. Instead, the graph predicts the general sequence a person, or an organization, will assimilate a Change.

Second, the level portion at the top right of the diagram—the New Status Quo—is usually drawn higher than the starting area (Status Quo) on the left. In reality, that is not always the case. Change does not ultimately guarantee that we'll get to a better place. Sometimes it just gets us to a different place. It depends entirely on the Change and our response to it. It is important to understand that the Status Quo we're familiar with isn't permanent—we can replace it with a new Status Quo.

For most people, the notion that Change is a process is a revelation. They've been through Change in the past, but all they remember was the Chaos. They perceive Change as a single event. By pulling this event apart into its components, Satir's Model allows all of us—management, staff and all other affected parties—to see and understand the inner workings of Change.

That insight, though simple, immediately enables us to know some important things about Change.

1. **Change takes time.**
2. **Moving from competence to incompetence is a natural process.**
3. **New competencies are acquired slowly initially but adeptness eventually leads to faster skill acquisition .**
4. **There is an inherent conclusion that the current Status Quo is a temporary state. The New Status Quo will eventually require Change also.**

“ *All changes, even the most longed for, have their melancholy; for what we leave behind is a part of ourselves; we must die to one life before we can enter into another.* ”

Anatole France

1. The Status Quo

This Change Process starts here, with an examination of existing conditions, or the Status Quo.

What is the Status Quo? It is the sum total of all the investments we've made to get to where we're at. The key word is **investment**. This word encompasses everything it took to arrive at a specific time and place. Let's consider a personal example.

Do you own a home? A car? What kind of lifestyle have you created for yourself? You have spent time, money, effort and resources to acquire skills, self-esteem, a way of life, our relationships, our level of comfort, a good job, etc. Everything you have worked tirelessly to obtain is your Status Quo and you want to protect them. It's human nature to value what we have. In fact, our society has created entire institutions to ensure that no one takes these possessions from you without your permission. The military, the police and the judicial system exist solely to protect our investments.

There are other possessions we value but do not think about until they are lost or threatened. Possessions such as choosing when to take a break, where to go for a coffee, or even choosing to go for a walk instead. These simple freedoms appear trivial until someone says you cannot make those choices. Then, your Status Quo is being eroded and the control you thought you had is threatened.

One could argue that material possessions are of little value when compared to these softer possessions. Society has not created formal institutions to protect all elements that make up our Status Quo, you have created personal defences against losing these softer components of your Status Quo. For example, you likely do not throw away everything you have and start from scratch every time something new comes along.

That's what Change is ultimately all about. Are we willing to have someone take our Status Quo away from us—the one we have worked tirelessly to build—in exchange for something else we might not want or understand?

The answer to that depends on the answer to this question: Do you like your current Status Quo? What specifically do you like or dislike about the current situation? How does it compare to what you're being offered in trade? If you're implementing this Change, do you understand what the new Status Quo will look like?

The Status Quo does not always hold us back from Change. Sometimes the Status Quo is so intolerable we'll do anything to get to some other place, any place, as long as we can escape the Status Quo. The Status Quo can be both obstacle and motivation, sometimes, paradoxically, at the same time.

Kurt Lewin, a luminary in social psychology, stated, "If you want truly to understand something, try to change it!" He could have said, "If you want to change something, try to truly understand it first." So, with apologies to Lewin, how well do you understand your Status Quo?

Status Quo Profile

Write a description of your personal Status Quo. Make it as detailed, complex, complicated, messy, uncertain in writing as it is in real life. (Until you understand what the Status Quo is, you're not able to attempt to Change it).

Having each person on your leadership team take the time to complete this exercise and then compare notes might be the most useful thing you could do in advance of any Change.

NOTE: Because you might be sharing this with others, keep information you don't want to share on a separate sheet for your own reference.

To help you get started, your Status Quo is an inventory of **all** that you value—material assets, skills, competencies, list of comfort zones. Another way to view this is to list all the things you'd miss if they no longer existed for you. You should have no problem filling out the space provided. Use a blank sheet (or two) if you need more space.

-
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-

Below is a sample list of items that could make up a Status Quo. You may reference this list if you wish. Note that what is considered valuable differs greatly from person to person. Whatever you choose to include is correct for you.

My personal Status Quo

- *I live in Brampton*
- *I own my own home*
- *My eyesight has stabilized*
- *I have a library of 5000+ books*
- *I'm married and have two married sons*
- *I've lived in my home for more than 30 years*
- *I have one remaining sibling - my parents have both passed away*
- *My sons live in the GTA*
- *I'll be a grandad soon*
- *My health is good*
- *My weight could be better*
- *I don't smoke*
- *My retirement is secure*
- *I've been married 40 years*
- *I can drive a standard but I prefer an automatic*
- *I can walk to a nearby mall*
- *We own a car*
- *We own a dog*

SAMPLE

My employment Status Quo

- *My work involves a lot of international travel*
- *My work day is eight hours long - the start and end times are flexible*
- *I write a monthly column for Municipal World magazine*
- *I love speaking for a living*
- *I can freely work in numerous countries because I have two passports*
- *I only speak English*
- *My office environment is very quiet*
- *I can continue doing what I do for as long as I want and my health co-operates*
- *I have a door on my office*
- *My income varies wildly from month to month, but I am accustomed to this*
- *I don't get constantly disturbed*
- *I have a good reputation as a speaker*
- *I know how to use computers better than most*
- *I know how to use the current suite of Microsoft office*
- *I rely on my iPad for work and leisure*
- *I don't use PowerPoint when speaking on stage*
- *I enjoy writing*
- *I'm an extreme introvert*

SAMPLE

It does not matter if any of the items in the example overlap with yours—there may not be any overlap. What is important is that everything listed in your Status Quo inventory is important to you.

Note the example includes some items the participant aspires to change (this is true of anyone's Status Quo) as well as items the participant would resist changing without good reason.

When you look at your list, you will be able to assess which you value more and which you value less. There will be some key items on your list you would not Change even if our lives depended on it, others will be trivial and could change tomorrow without much regret.

When contemplating a Change, a solid, in-depth understanding of the current Status Quo is crucial. For example, if you were offered a job in a city other than where you currently live, how much would it disrupt your Status Quo to accept the offer?

This is exactly what happens when we contemplate an organizational Change. We disrupt the Status Quo not only of the organization, but of every individual affected by the Change.

How significant is that disruption? It depends on how much the organization, and the individuals, value those items the Change will disrupt.

Sometimes people are not aware of what is valued **until** it changes. Here's a simple example: it is common for families with young children to watch TV together each evening. As the children get older, a parent might purchase a second TV (or computer) for the children to watch their shows. This is a simple and common Change. Yet how many parents realize they have lost family time? How many didn't realize how important that was until it was gone?

By not being aware of what you value, such as family time, you lose it because of an ill-considered Change. All Change is like this, unless we inventory what we value, we can lose it without due consideration.

2. Foreign Element

The foreign element is the event that triggers the Change. It is not necessarily the Change itself. The foreign element is defined as “the event that threatens the Status Quo.” It can be imposed on the Status Quo by external forces or generated internally by either the individual or organization initiating a Change.

The distinction between an external versus internal foreign element is a useful one. Asked to define Change, one reasonable response is “Doing things differently.” Interestingly, that exact same phrase “Doing things differently” also describes Creativity.

The provincial government’s directives for moving away from the Sheltered Workshop model is an example of an external foreign element. At the same time, our desire to see people more included in community is a somewhat complementary internal foreign element.

While bad Change is usually perceived as being externally imposed and good creativity is internally generated. But consider the widespread belief about Change stated as, “People resist Change.” This is a misleading, non-productive and confusing myth.

People don’t resist Change. What people resist is **being** Changed without their consent and with no control over the process.

Proof that people resist Change is a myth is discovered in day-to-day actions. When people have control over the Change process, they willingly undergo all types of Change. People seek promotions, get married, have children, learn new languages, etc. All actions that contradict the notion that we resist Change. The simple, observable fact is, we don’t. We embrace Change all the time.

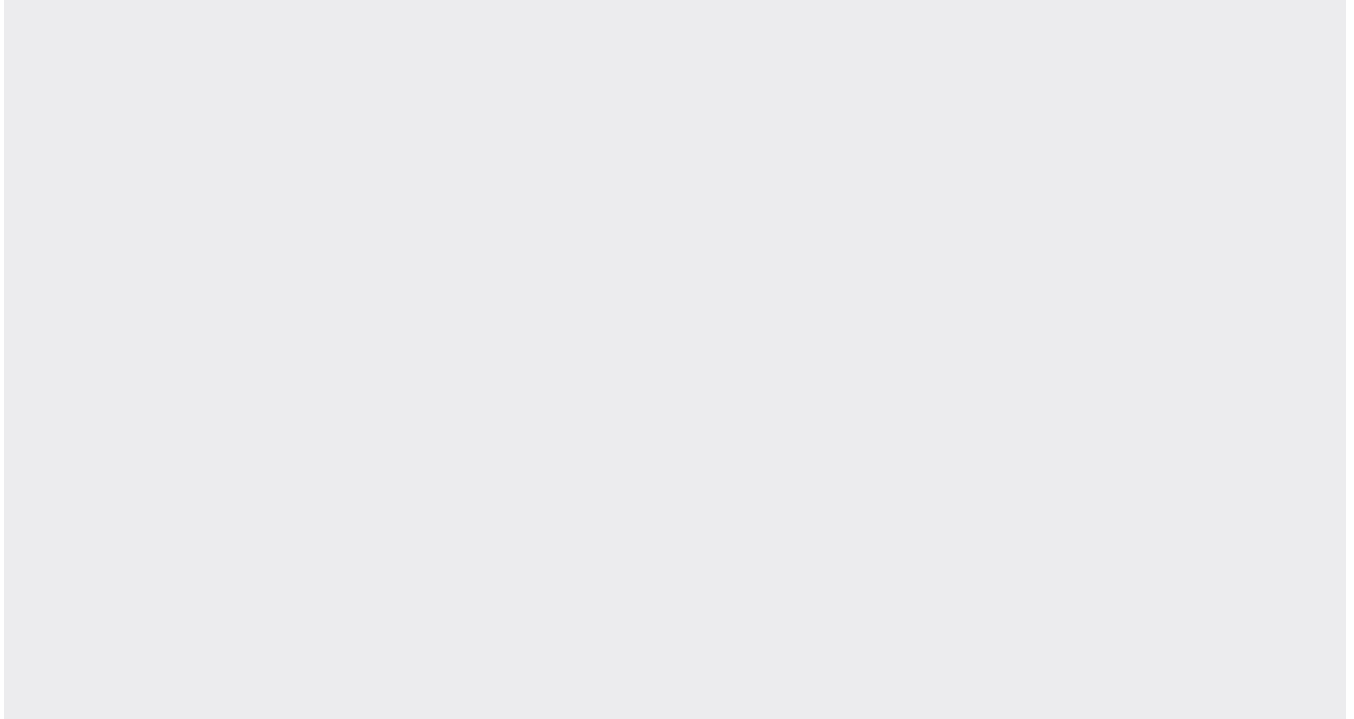
A powerfully effective strategy when implementing Change is to make the foreign element as internal as possible. In other words, give as much control as we can to those who must undergo the Change. This concept is not that unusual anymore. In fact, we hear the descriptor all the time: empowerment. It’s the power of choice. When we lack choice, can we even describe ourselves as free? That appears to be an overstatement, but it explains why we rebel so strongly when we’re not given a choice in our activities.

One form of control over Change is access to information. If the target audience knows their Status Quo, and **if** they know everything there is to know about a threatening foreign element, then they are smart enough to predict that **not** changing is not in their best interest.

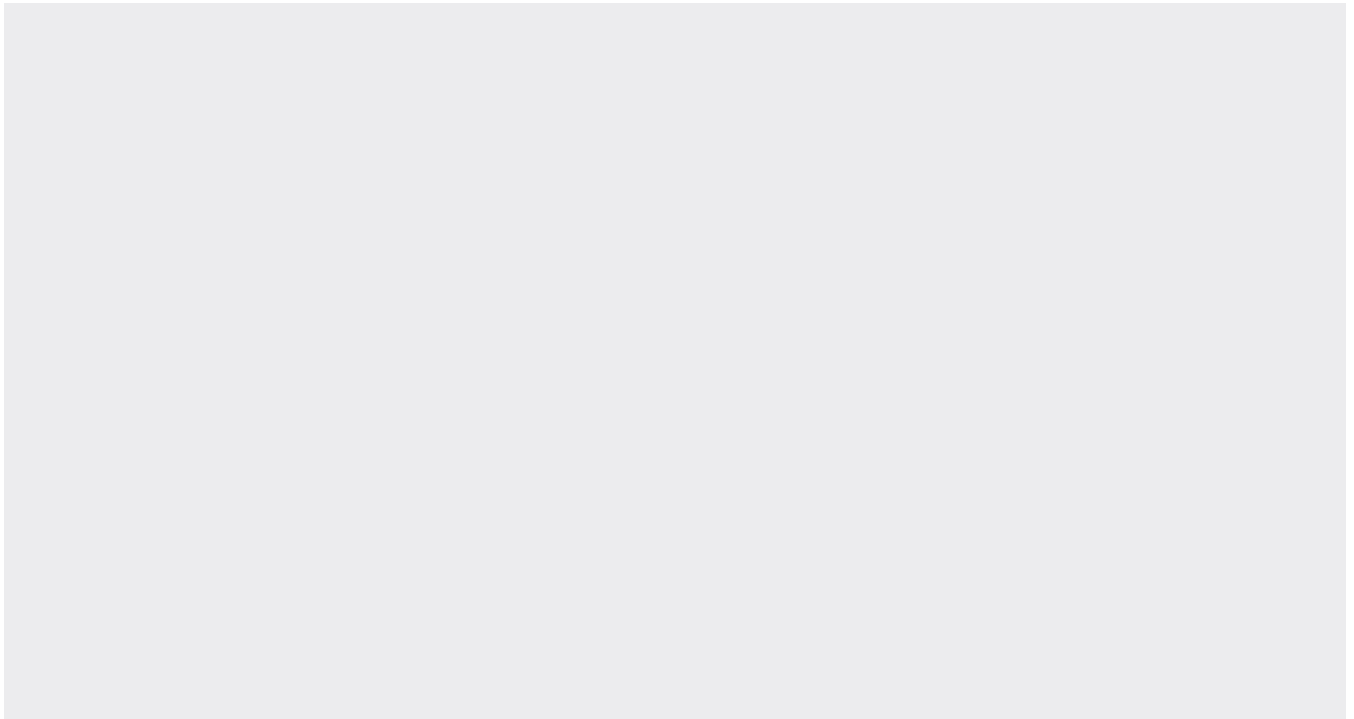
People don’t resist Change just to be stubborn. They resist Change to protect their Status Quo from what they perceive as unnecessary Change.

Foreign Element Description

Write a detailed description of one of the largest Changes you embraced in your life. Identify the specific Change it made to your initial Status Quo: What was trivial? What was difficult?



Now that you've described this Change, describe the process that compelled you to make this change in your life. In other words, what was the driving foreign element that moved you to change your old Status Quo in favour of something new?



Here is an example of one type of big Change for reference.

Quitting University after three years.

I had planned to become a teacher of Mathematics at the high school level. The only reason I went to university was to get a four-year degree that would allow me to attend teachers' college. I needed that piece of paper because it would allow me to become a teacher.

This was huge Change for me. It destroyed a dream I'd had for years—to teach. I'd been teaching informally as a math tutor since high school and enjoyed the feeling I got when I helped a student finally “get it.” I could almost see the light go on in their eyes and I knew that I'd had a positive effect on another person.

That dream to become a teacher was driven by the fact that all my Math teachers had been brilliant teachers and they shaped how I thought.

Deciding not to become a teacher had unintended consequences. I had planned to get married once I become a teacher. Since I'd given up on that dream, I got married at least two years earlier than expected.

SAMPLE

What was the foreign element that caused me to embrace such a difficult life choice?

Halfway through my third year at University, the provincial government announced that there was a surplus of teachers and if new teachers wished to teach, they'd have to take positions in the far north.

This was a disruption that I had not planned on, I had no control over, and was simply the new reality I had to live with. I hated the development, but I knew that moving far north would not work for me.

That type of Change would disrupt some parts of my Status Quo that I was not willing to embrace. My fiancé's family were very close and if I wanted to get married, I had to take that disruption to her Status Quo into account.

It took me about three months to come to the conclusion that I had to change my personal goals if I wanted to keep the most important part of my Status Quo intact. My plans to get married.

SAMPLE

3. Threat Analysis

Threat Analysis was not a visible component of Satir's original model. Instead, this author added the component after working with her original model for two decades. It specifically answers the question, "Why is this Change necessary?"

The basic premise underlying the Satir model is that *we protect our Status Quo from unnecessary Change*, the key word here being **unnecessary**. How exactly do we decide a Change is necessary? And once we have decided that a Change is required, the next question is, "How do we zero in on all the possible Changes available to us?"

We start with the foreign element and ask ourselves if we care about it. Does it present us with a threat or an opportunity? We answer that question by doing the simplest of thought experiments. We consider what happens to us in the future if we do nothing different, if we maintain our Status Quo in spite of the foreign element (or elements).

Once we have an image of a future in which we do nothing differently, we evaluate it. We ask if it is a future that is good for us or one we would like to avoid.

If it's an acceptable future, then we'll do nothing in response to the foreign element. This is the source of the common argument, "If it ain't broke, don't fix it!"

However, if the future we envision by maintaining the Status Quo is unacceptable to us, we recognize that Change is necessary. We don't know what we have to do yet, but we've accepted that Change is necessary.

We then examine the spectrum of possible responses to the foreign element, which we believe will result in a more positive future. Some of these possible Changes will be obvious. Some will require more study, research and analysis.

Once we have a list of possible Changes, we must decide which one is the best course of action for us. We make that choice by identifying how we compare each possible choice against the others.

Threat Analysis is what creates ownership of a Change. There is a difference between buying into someone else's Change, and going through the Threat Analysis ourselves to determine the necessity of a Change and then selecting a specific Change from all the possible alternatives available.

The Threat Analysis

In the earlier assignment, you described a major Change that you embraced and the reason (foreign element) that compelled you to make that choice. Now let's dig deeper.

What would have happened if you had decided to ignore the identified foreign elements?

What other alternatives did you consider in addition to your final choice?

What criteria did you use to assist in your Change selection process?

As you answer these questions, it may become apparent that you already know how Change works. The answers are likely coming easily to you. Even if you've never seen the Satir Change Process model before, the concepts are familiar to you.

You know we have a comfort zone, it doesn't matter that she uses the term *Status Quo*. You know people would prefer to stay in that zone if they can and won't choose to move outside it unless there's a good reason to do so. This is Satir's Foreign Element. You even know that Change involves sacrificing some parts of the Status Quo to protect other parts that are considered more important.

Consider the example, continued from earlier.

What would have happened if I had decided to ignore the identified foreign elements?

If I'd ignored the news that there was a surplus of teachers, I would have completed my four-year degree and then invested a final year in teacher's college.

Once I became a teacher, I'd either head north, accepting that I could not find work as a teacher in Southern Ontario, or look for a career in some other profession.

I would have wasted two years in school and would be forced to look for other types of work.

SAMPLE

What other alternatives did I consider in addition to my final choice?

1. With citizenship in two other countries, Ireland and South Africa, I could decide to shift my studies to another country.

2. I could shift my field of study to something other than teaching. Maybe pure Mathematics or Engineering.

3. I could give up on the idea of a degree and head into the trades—perhaps as a plumber since I'd been paying my way through University as a part-time plumber.

SAMPLE

What criteria did I use to assist in my Change selection process?

1. I really wanted to be a teacher!

2. I was unwilling to uproot my future wife from her family.

3. I liked computers and knew they'd change the world.

4. I didn't want to waste my University experience; I wanted to complete a three-year degree.

5. Getting a well-paying job in southern Ontario was a must if I wanted to own a home and raise a family.

SAMPLE

Selecting a Change from all the possible options is never easy. We have conflicting goals and desires. Deciding which Change to embrace is, inevitably, a balancing act of compromises and difficult choices.

Organizational Change is no different except in one aspect: it is more complicated. There are many people as well as the organization to be considered in that balancing act of compromises and difficult choices.

4. Resistance

Resistance and denial are brother and sister in the family called **rejection**. One is active, the other passive, yet we perceive both as obstacles to Change. We will focus on resistance here and examine denial in the next section.

Often, many otherwise-astute managers say they want to hire people who **don't** resist Change. As a manager, the desire for a Change to go smoothly is understandable. But we don't want to rely on those who easily discard their competencies because something new is available. We need and want people to fight to retain their hard-earned levels of care and support until they're convinced that the Change is a positive one.

We need and want people to resist Change that doesn't provide a reasonable expectation of a solid payback. We require people to resist innovative ideas that are simply cool and trendy, but which offer no significant benefit and significant risk.

When someone is resisting Change, they are usually only asking the legitimate question: "Why should I throw away my hard-earned Status Quo?" "Because I said so," is a poor response. Most so-called Change problems are due to a lack of information regarding the necessity of the Change in question.

In poor Change management processes, organizations provide non-informative answers to reasonable questions and create environments where legitimate concerns never see the light of day.

Here is a phenomenon you may have experienced, one which supports the view that resisters are active and positive players in the Change process. How often have you seen the person most against your Change process initially become your greatest supporter **once** they saw the light?

This leads to a powerful strategy. In any target audience, there are people in three different camps: those who are actively against the change; those who don't care what happens; and those who strongly support the Change and who are willing to work to make the change happen.

Considering the above observation, which group should we spend most of our time on? With which group do we do everything in our power to ensure the lines of communication remain open? The fact is, our most active resisters are potentially our most determined and positive supporters.

The Resistance Inventory

Your completed Status Quo Profile is the foundation for the next exercise.

Your task in this next exercise is to look at each item and, on a scale of 0-10, rank each one on how resistant you are to a change to that item. Use the following as a guide.

- 0** – A trivial Change. No big deal.
- 2** – I need a reason to Change.
- 5** – I'd need a very good reason to give this up.
- 8** – In addition to a very good reason, I'd have to get something in return.
- 10** – No way. I'd quit my job to avoid this Change.

Do not let the scoring distract you. The purpose of this exercise is to illustrate that resistance is not the same from item to item; to recognize the things you would give up if there's a reasonable argument for the Change, while we value other situations so highly, nothing will get us to give them up.

One more exercise before we leave the topic of resistance. For each item in your Status Quo, provide an example of a specific reason that would convince you to change that item.

To aid you in this, here are some examples from my list...

- *I live in Brampton: I'd be willing to move if either of my sons needed me to be closer to them for some medical reason.*
- *I have a library of 5,000+ books: I could reduce my library if we had to move. I would not allow my library of books to influence a decision to move to a new house.*
- *I don't have to commute: Unless I absolutely had to for financial reasons, I would not put myself in a position where commuting was a necessity.*
- *My sons live in the GTA: This could change at any time if either of my sons decided to move. It would be their choice, I'd hate it, but it's not something I have a right to influence.*
- *My work involves a lot of international travel: I would not change this unless there were changes to my health that made travel problematic.*

SAMPLE

The point here is that the reasons for Change vary greatly from one part of your Status Quo to another. It is, in fact, complicated.

5. Denial

No matter how long you work at managing Change, denial is likely the one reaction to Change that causes the most frustration.

Let's examine a definition of denial, one that most people would offer. "Denial is the act of refusing to accept a Change has occurred." In one sense, this is accurate. A person in denial is ignoring that their world has Changed in some manner.

The problem with the definition is a subtle one. The word *refusing* strongly implies the person in denial is **choosing** to ignore what has happened to their Status Quo. There is likely another explanation, that those in denial are sometimes oblivious of the Change. This means a more accurate definition is: "Someone in denial continues to use behaviours that were once effective and efficient but are no longer appropriate to the task or the new reality."

Here is an example from the author's experience. Setting up a team of players, the exercise is for the team to provide non-verbal assistance to a blindfolded team-mate, who is to sort a deck of cards into a particular sequence.

During this exercise, a curious phenomenon plays itself out regardless of who makes up the team members. Whether clerical or upper-level management, team members always **point** to where the **blindfolded** person should place the next card!

This is not surprising. After all, pointing to where someone needs to place a card is the most effective means of completing the task—if the person could see the pointing finger.

It is instructive to understand, for our purposes, that when I bring this to the attention of the pointer in question, they nod their head in agreement and cease their useless behaviour. This is also expected. People do not knowingly continue with ineffective methods.

However, the changed behavior lasts only briefly before they start pointing again. They are oblivious that this behaviour is no longer appropriate to the task. How do you solve this obstacle to Change? Patience and gentle reminders until the new behaviours become second nature.

There is no worksheet for this section.

6. Chaos

Here is a summary of what we know so far. We start at a level of competence, a status quo. Then a foreign element asserts itself, requiring a Change. We do a threat analysis to envision our comfort level with the Change or maintaining the status quo. Discovering the Change is required (by the external foreign element) creates resistance to and denial of the Change. Change is an inevitably stressful transition, because Change requires that we learn new skills. The foreign element (FE) results in Change that eradicates competencies and makes us incompetent. And that is uncomfortable.

Here is a common situation as an example. Imagine you have purchased a new piece of tech—a smart phone, a tablet, even a new television. Your first attempts to use the new piece of tech likely leave you frustrated. Perhaps you even begin to feel stupid because you don't know how to use the product immediately. The Change, even the one you've chosen to undertake, has left you feeling incompetent, mired in chaos. This common occurrence has led to the worldwide success of the *For Dummies* brand of self-help manuals.

This response isn't restricted to Changing technical skills. All organizations undergoing significant Change experience their own chaos, their own inevitable incompetencies. Whenever we do something new, something we don't know how to do correctly at first, we make mistakes. If we are unreasonable with ourselves, we blame each failure on our actions and not on the inescapable fact that we cannot possibly know how to perform a new task expertly.

The first time we tried to ride a bike we fell off. The first time we tried to swim, we spluttered as we got water up our nose. The reality is that Change rides on the back of incompetence.

This fear of incompetence, or being perceived as incompetent, is endemic in the world. Think back to the last time you assumed a new position of responsibility. A new job or leading a new project, were your thoughts consumed by fears of failure? We don't easily share those feelings with others for fear of being perceived as incompetent.

While the perception that we should always be competent, is both unreasonable and unrealistic, it is a reality we must embrace if we wish to manage Change.

On a personal level, we can work at changing our own response to incompetence. Incompetence is not a four-letter word. And it can be cured with training. In fact, incompetence bestows many opportunities: it gives us permission to play, experiment and make mistakes. We simply have to shift our point of view to see it for what it is—a natural and temporary state of being when faced with something new.

Preparing for Chaos

Now we recognize that Change is painful and momentous Change is even more painful. Learning to ride a bicycle will involve a knee full of cuts and bruises. Learning a new language will be a difficult and time-consuming process.

We become a bit less honest when we attempt large Change. We think that by avoiding the inevitable difficulties, we can somehow take the edge off them. We set unreasonable expectations and find ourselves surprised when things don't go exactly as planned.

1.

2.

3.

4.

Think back to your own experience with Chaos, the major Change in your life you described earlier. That Change likely didn't go as smoothly as you wanted. There were some challenges along the way. For this exercise, list three or four of those challenges and then describe how you overcame them.

To help you, here is completed version built upon the earlier examples.

- 1. I still wanted to be a teacher! I took on the role of teaching new employees at my job, as well as the task of preparing instruction manuals. If I could not be a teacher, I could do something similar.*
- 2. My new job involved shift work! Nothing I could do about that other than accept it..*
- 3. My new job was boring! I looked for ways to advance in the organization to find more interesting work.*
- 4. My employer had my whole career planned out after six months. I tried to get their plans to meet my desires but failed. I sought employment elsewhere.*

SAMPLE

**REMEMBER: Change is a constant series of readjustments
in order to create our own comfort zones. All Change is temporary.**

7. Integration

There is no other word to describe this phase of the Change process except unexpected. No matter how often we go through Change, no matter how cautious or observant we become, chances are Integration will 'get us' time and time again.

What does Satir mean by **Integration**? Let's look at an example.

Your organization has recently upgraded to a new suite of products and you've been learning the new versions for several weeks. You're feeling confident because you now know the new version well. So well that your manager has asked you to prepare a document to be copied and shared with team members. You create the file, building tables and graphs, then make copies for the team. As you are putting the copies together, you notice a graph displaying incorrect information. Anger and frustration set in, and you begin to believe you'll never understand this new product.

You have moved from feeling that you have achieved competence to discovering you still have a way to go.

Integration is that short emotional phase in the Change process where, once we get a sense we've finally achieved the desired Change, we overreact to tiny, inconsequential upsets.

I include this as a part of the definition to complete Satir's Model. As such, it serves only as a reminder that temporary setbacks are a part of the Change Process. I have yet to arrive at 'advice' that I consider productive in dealing with this phase of the Model - except for the almost trivial advice of: Expect Setbacks to occur near the end of your Change Journey and recognize that they are normal.

8. New Status Quo

You have worked through the first seven stages of Satir's Change Process Model. You have arrived at the New Status Quo. Your competence levels have returned to pre-Change levels. You can relax. But don't get too comfortable. The next foreign element is just around the corner ready to shake up this Status Quo.

In this new, confident place, take the time to examine the one competency that rarely changes: your ability to learn a new skill. People tend to underestimate their ability to learn something new. Consider this question: Could a nine-year-old child perform the tasks you do every day to earn your living?

Could this same nine-year-old child drive a car, fly a plane, write an article, program a computer, train a dog, fix the plumbing, create an ad, or fix a furnace? The correct answer is yes—but only with training. The same training you have been receiving since you were nine years old. This mythical child is you just a few years ago.

The ability to learn is our strongest talent. It is the skill that makes it possible to Change, to move from competence to incompetence and back again. We underestimate this strength again and again.

Is learning how to use a new application or do business a new way any more difficult than learning how to swim or ride a bicycle? Learning the latter two risks drowning or injury, while learning the latest gadget, while difficult, never really threatens pain or injury.

The secret, of course, is creating a mindset where the act of learning is seen as an opportunity and not as a threat. There's no easy solution to creating this shift in perspective. It comes with experience as well as a decision to see learning and Change that way. In many ways, it is a personal decision to see **everything** as an opportunity rather than as the act of a malicious universe.

Understand Your Specific Change

Now that you understand how the Change process works, let's apply this new knowledge to the current Change.

Keep Virginia Satir's Change Process Model in mind throughout the rest of the process. It will support you in the work ahead, allowing you to gain a deeper understanding of the specific Change ahead.

As mentioned in the Preface, Algoma's vision is *"That all people live in a state of dignity in their community, where they can access supports needed to ensure full inclusion."*

Your vision, if you've already thought about it, is likely different. Whatever it is, it describes a situation different from what you have today. That, along with Satir's template, provides a starting point.

Before implementing a Change, we must understand all the reasons for it. We must become experts in the Change being proposed, or reacted to, because people will look to us for answers. They might even look to us for guidance. At the very least "Is the Change necessary?" will be asked by everyone impacted by it. It would be nice to have an answer.

Satir's model starts with the Status Quo. But in reality the foreign element is what first catches our attention. We do tend to become complacent with our Status Quo as we live it daily, that is, until it is threatened by a foreign element.

Your first goal is to gain a better, deeper understanding of the foreign element because that is what drives Change.

What/Who is the foreign element?

The foreign element is the event, or person, that will disrupt the way things were, otherwise known as the Status Quo. It's dangerous to assume that the foreign element is obvious to everyone. If the foreign element is misidentified, then the Change is more difficult to manage. Put another way, think of asking "What's the real agenda?" If assumptions are made about why this Change is being made, and these assumptions are wrong, it is likely the type of Change implemented will not address either the real issue or that hidden reason for the Change.

Each member of your management team—perhaps even your Board of Directors—should complete the rest of this workbook independently of each other. A comparison of responses will provide a wealth of insight, and may make your transition as painless and as successful as possible.

Write a detailed description of what is driving the Change towards Community Inclusion. It is possible, though unlikely, that the foreign element challenging your organization isn't just one thing but a combination of factors, all contributing to an understanding that a Change is necessary.

A proper description of the foreign element will be long, but necessary. The more difficult it is to do, the more necessary it is for your organization. Without this description, it will be impossible to articulate to others WHY you're embarking on the transition. Use another blank sheet if required.

You will have your own perception of the foreign element encouraging Change in your organization. Your responses will be unique. But the list of foreign elements below, identified by others in your field, may be helpful. Not all will apply to your organization as forcefully as they apply to others. Some may be irrelevant while others might be your most important drivers.

History of care

The history moves from non-existent, where those in need were provided a subsistence living, to institutions, where those in our care were perceived as patients, to the current setting, where people are seen as independent individuals but not necessarily as full-fledged community members.

The Garrie v Janus Joan Inc. Feb 2014 Ruling by the Human Rights Tribunal

Vice-Chair Bhattacharjee stated that: *Paying Garrie and other developmentally-disabled employees less than minimum wage was "an affront to their dignity and disadvantage."*

From: Differential Pay-Schemes Rules Discriminatory – Barry W. Kwasniewski

<http://www.carters.ca/pub/bulletin/charity/2014/chylb345.pdf>

Growing acceptance that loneliness is a source of illness

One reference out of many: Loneliness and Social Isolation as Risk Factors for Mortality

<http://journals.sagepub.com/doi/abs/10.1177/1745691614568352>

Growing recognition that current practices ignore the need for community inclusion

"Belonging to One Another: Building Personal Support Networks," Community Living BC,

<http://www.communitylivingbc.ca/wp-content/uploads/Belonging-To-One-Another-final.pdf>

Your own response

When you compared the earlier results to the exercises in the Preface.

The provincial government's initiative

To move away from the current standard of care, the Sheltered Workshop.

Demands/pressures from the marketplace

The Change in what our customers, both present and future, expect from us.

Simply put, are we offering the product or service that they desire?

The answers you provide to the questions throughout this workbook will have much in common with the answers provided by organizations like your own, but your responses are unique because your Status Quo is different from theirs.

The questions asked are important questions, although they are not the only questions we could ask. And they must be answered by those leading the Change.

The list on the previous page is a reference. It should not be considered as others dictating how you should think or how you should answer the questions. It is important to remember that you are not being told what to believe. Instead, you are being asked what you believe. This concept is central to managing Change.

Remember, people resist being Changed without their consent and with no control over the process. This will become a central theme when you begin to consider how to start your transition to a New Status Quo.

Consider this: if you, on your own, decide exactly what your organization is going to look like in five to ten years, then you will fail. If your vision of the future is not a collaboration between your management team, board of directors, staff, customers, community and parents/guardians/family, then you are going to fail. Instead, it is better to follow advice from Jim Collins, author of *From Good to Great*: to bring about great change you need to “go to your people with questions, not answers.”

One final point. If you take another look at the foreign elements list on the previous page, you will see an item that goes against this wisdom. One of the identified foreign elements is directly, and forcefully, dictating Change to your organization.

The provincial government’s initiative

- To move away from the current standard of Care: The Sheltered Workshop
- Further, the *Fair Wages Act*, Bill 148, eliminates the exemptions to paying minimum wages that Sheltered Workshops currently receive.

Even so, how you choose to respond to their directive is up to you.

Accepting this directive, which is entirely out of your control, you can then start the journey toward Change.

What happens if you don't Change?

What are the consequences if nothing Changes, if you maintain the Status Quo?

How certain are you that these consequences will take place? What evidence do you have?

If the target audience does not believe the consequences will occur, or if the consequences have no noticeable positive or negative impact on them, they will not be motivated to move forward.

People need to understand the real necessity for the Change.

When they understand the need to Change is real, most people are unlikely to resist the Change as strongly as those who believe the Change is unnecessary.

What choices do you have? List at least three.

1.

2.

3.

How do you select one choice out of all the possible choices open to you? Put another way, what criteria are you going to use to aid in your selection process? List at least five.

1.

2.

3.

4.

5.

Who is affected by the Change?

Identify **all** the people involved in how your organization currently exists:

- Individuals you support
- Individuals providing that support
- Those on the outside who support your organization
- Individuals who depend on your organization to provide support
- Those who benefit directly, or indirectly, by the support you provide

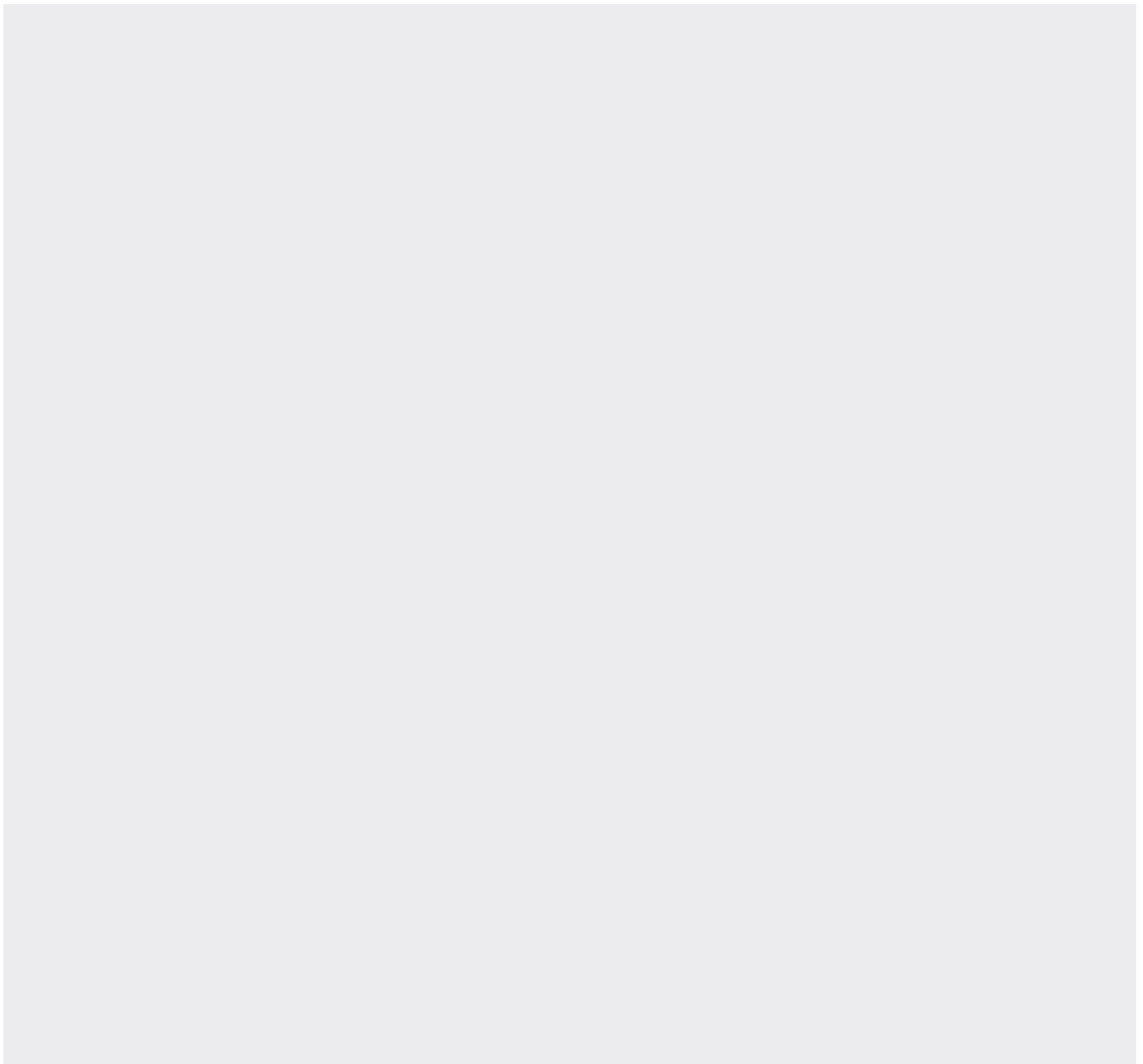
This will be a long list of people and you will need blank sheets to complete it. Use a single sheet of paper for each person you identify, placing them into appropriate categories.

Label this collection of sheets Individual Profiles. You will use this as a resource throughout your transition, including adding information to each profile as you work through the exercises. Organize this resource in whatever way works best for you.

When will the Change take place?

The more imminent the Change, the more people can relate and respond to it. Sometimes the only way to get people to accept that a Change is real is to attach a firm date for implementation. We're all busy; our plates are filled with projects and important to-do items. If a Change doesn't have a deadline, if we have not assigned a priority, if budgets are nonexistent, then the Change itself doesn't really exist and we will ignore it. Distant Change is less 'real' than imminent Change.

Create an initial, draft, first guess, temporary, written in pencil (you get the idea) 'timeline' or a 'project plan' for your transition. At this point it does not reflect reality, so don't think of it as being cast in stone, it is subject to change. It's just a starting point for looking forward and getting a sense of what will need doing before you get to the final goal.



Why now?

What forces this Change upon us now? Why not next year? Why not last year?

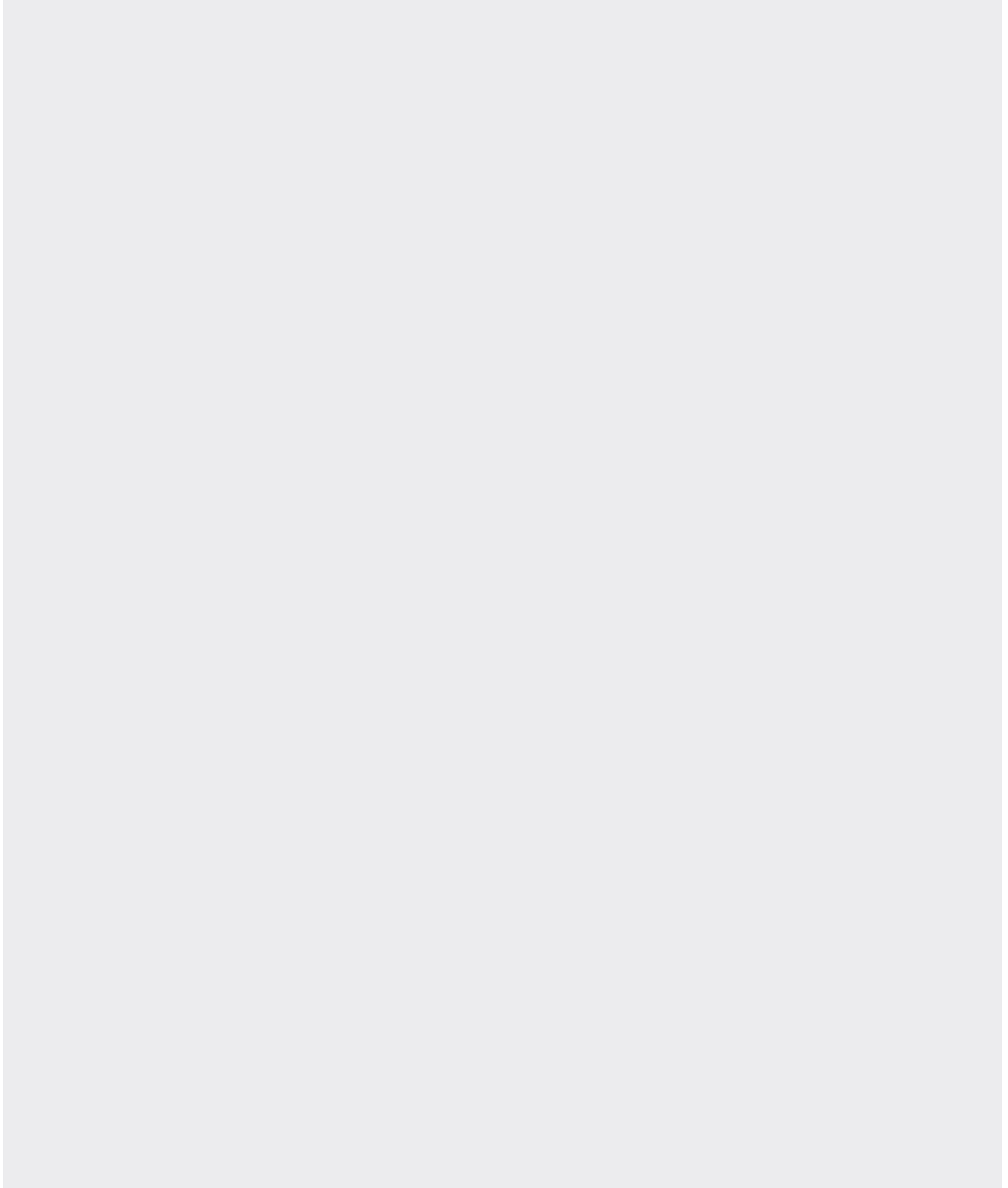
What makes it important that we act now? What is it about this foreign element that causes it to affect us today?

If this Change is important, why didn't we address it sooner?

These questions, if answered properly, provide justifications for the Change. They legitimize it. If the answers aren't readily available, you're communicating to the target audience that this Change is arbitrary.

How will the Change affect us? Today? Tomorrow?

This is another key question. It is a version of “What’s in it for me?” But for this version, answer it with respect to time. What happens tomorrow? Next quarter? Next year? Five years from now?



How have others managed this?

Regardless of the Change we're facing, it is a mistake to assume we must embark on the transition alone, using only the resources immediately available to us. Regardless of the Change we are facing, others have faced it in the past, are facing it currently and will face it in the future.

If answering any of the questions so far has been challenging, know that you are not alone in feeling that way. Others will have the same worries and concerns about answering the questions as you do. Just think about how much you could learn if you had all the answers other people have provided, or could provide, to the questions you've struggled with.

Therein lies the lesson: it's far easier to succeed if we take the time to learn from others, from both their failures and their successes. We must move away from the idea that to be a success we must succeed alone. There is absolutely no reason to attempt major Change on our own. Especially Change that can and will affect the lives of those we support.

The next exercise provides an opening for us to reach out to others by taking us outside Satir's Change Process Model. Identify your peers in a half dozen organizations and work with them to determine what they've attempted, what worked and why, what failed and why.

You could start by identifying organizations you know will be affected by this Change and reaching out to them for a conversation, or as many conversations as you need to really gain some insight.

1.

2.

3.

4.

5.

6.

When speaking with your peers, collect their stories, both the successes and the failures. Stories are how we communicate ideas. They provide warnings and hope for Change. There is no better way to lift our spirits than by hearing how someone else overcame obstacles similar to or greater than our own.

Establish Rapport

What does “establish rapport” mean? It means work toward building a harmonious relationship. Or work toward maintaining harmony in an existing relationship. Consider this truism from sales: People buy from people they like. Do people trust you? Change Management is an exercise in diplomacy.

Don't Have all the Answers

Change agents tend to outline the entire Change. They see the Change as something they own and must therefore dictate the exact solution. A policy written with the users' input will always have a better chance of success than a solution forced on them by an isolated manager. The role of a Change agent is to make Change possible. It is not to define the Change to be adopted.

When thinking of implementing a major Change, the person with the initial desire for Change has a unique challenge. They **know**, based upon their private reasoning, what they would like to have happen. They have a vision of the future and are motivated to instill that singular vision in others. They believe this is best accomplished by telling them what to do. It is easy to forget that people don't like being told what to do.

The advice to people with a vision is simple to state and difficult to accept. Keep your initial vision open to allow others to create their own version of that vision. If we take the time to get agreement on the existing problem, then we can trust people to come up with their own solutions. We can only do this if we can agree on the problem definition. Once everyone agrees on the problem, the proposed solutions will have much in common. Here are two questions to ponder.

1. What solutions can I seek from my team that will meet the needs of the organization?

2. What solutions **must** be implemented in a pre-defined manner to meet pre-defined requirements? Are there legislated rules we **must** follow in future? Detail these.

Support Empowerment

Empowerment means giving the target audience the power to make decisions. The flip side is that we, the Change agents, must give up the desire to make all the decisions. The more we leave in the hands of the target audience, the more we build their sense of ownership.

This relates to these earlier questions: How much involvement can we encourage? What are the risks? Are they acceptable?

With respect to the Change you are facing, what are the possible positive outcomes if you allow others more involvement in the direction we're about to take?

What are the worst possible outcomes and what could we do to mitigate those outcomes?

Don't Ask for Buy-in

When you ask for buy-in, you've already failed. It means you're presenting them with both a need to Change and the solution. To be more precise, you are presenting them with **your** solution. You have invalidated any empowerment you may have created.

Seek Out their Vision

Again, this meets their need for ownership in the Change. We resist Change most when it leaves us powerless, when we have no control over our future.

Identify Influence Leaders, Early Adapters and Resistors

Influence Leaders are those whom others look to for guidance. They are not necessarily those who take to a new Change first. Our time is best spent getting these influencers on board with the notion that Change is necessary rather than catering to those who are on the fence or those who already see the need for Change. (Be aware you may find a situation where the biggest resistor is also the biggest influencer.)

Early Adapters are those people who see the Change as a necessity.

Resistors are those who would rather maintain the Status Quo. They resist for any number of reasons: they don't see the need for Change, they don't expect to be around when the Change happens, they think the Change being proposed is the wrong Change, they're afraid they won't be able to Change, among other reasons.

As an exercise, pull out all the Individual Profiles you created from the exercise on page 43. Identify those who influence the opinion of others. Also identify each early adaptor/supporter and each resistor.

For each person, ask yourself how they would respond to the stated necessity for Change if they were in charge. By asking for their solutions in designing the transition you're contemplating, you will be able to gauge how much control you can give them.

What would X do if they were in Charge?

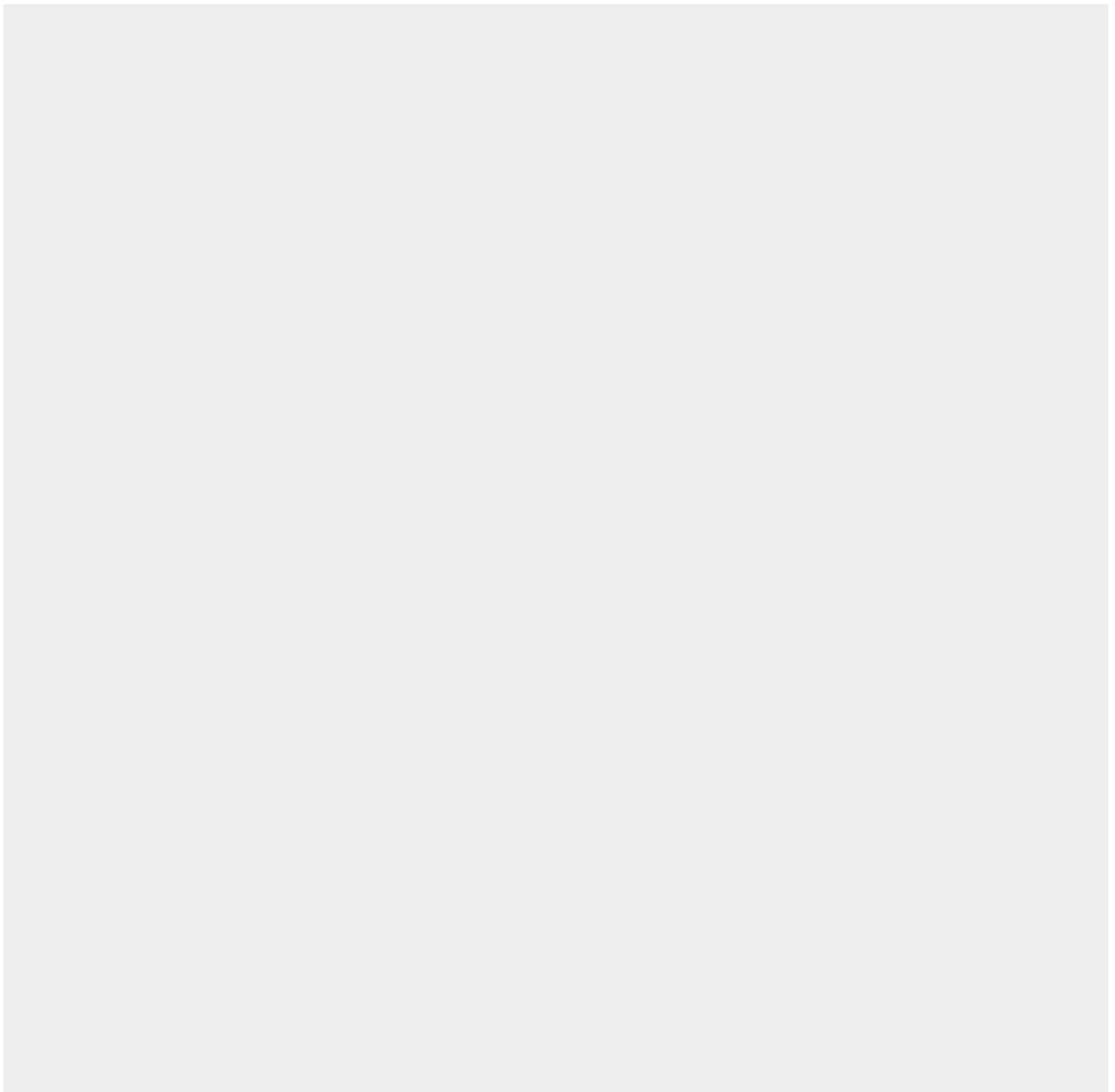
You will need to perform this experiment for everyone you identified as having an interest in the Change.

*Here is one way to identify Influencers: In a meeting where a controversial statement is made, who does everyone look at? This might seem simplistic, but influencers are not difficult to identify. They are literally people who guide the thinking of others. Knowing who they are, and ensuring that the power of their influence is working **for** your Change rather than against it, is a critical success factor.*

Change Thinking: Change Agent versus Inflictor of Change

The term **Change Agent** creates an image of a person on a mission. Another phrase more in keeping with the reality that Change hurts is **Change Inflictor**. It forces us to keep in mind our primary task is to disrupt the Status Quo. When we think like a pain inflictor, then we have one strong objective—reduce the pain. By showing concern for people’s reluctance to leave their Status Quo behind, we also reduce their resistance to the proposed Change.

What pain points/points of resistance can you foresee during this transition, and what can you do to minimize the associated pain?



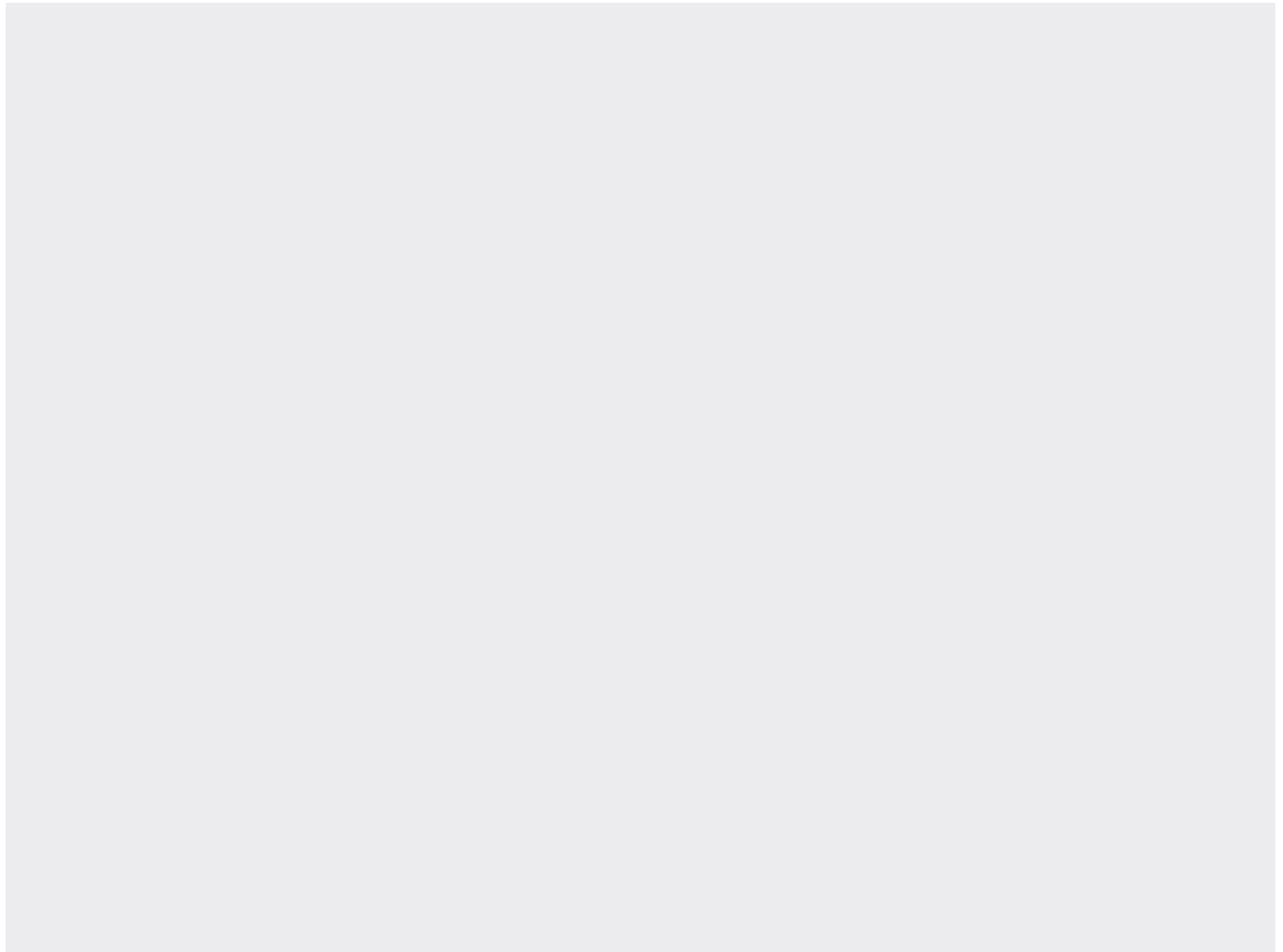
Understanding the Status Quo

Creating something new is, by definition, an act of destruction. When implementing Change, we replace the old Status Quo known to everyone, with a mere vision of a goal in the future. Having respect for the existing Status Quo builds respect for us.

How Long Did It Take to Establish?

Some Status Quos have been around for only a few months, others for years. The older the Status Quo, the more challenging it will be to remove because it has been proven itself to be valid.

What is the history of your existing Status Quo?

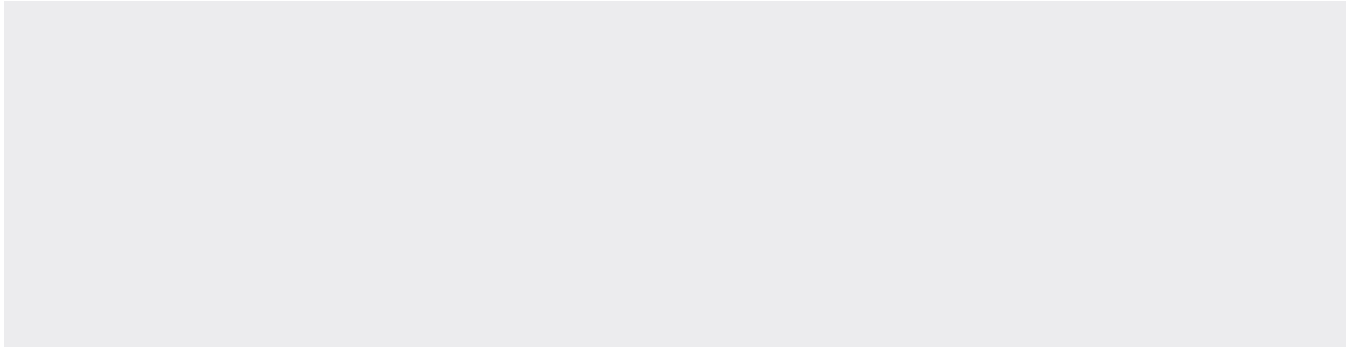


One of the key reasons for knowing the history of the existing Status Quo is to fully understand what we're asking people to leave behind. Showing respect for what has been accomplished in the past will help motivate people to build something new for the future.

Understanding what we're asking people to leave behind is the first step towards responsible Change.

What Investments/Sacrifices Did People Make to Achieve It?

How much have people invested in this Status Quo? Did they build it on their own time? Was it something that cost them personally? The more they have invested in the past, the more difficult it will be to move them forward.



How Many People Subscribe to the Current Status Quo?

Is this an organization-wide Status Quo or is it something that only a handful of people share? Is it a part of the sector culture or just a local way of doing things? One of the measures of the size of a Change is how many people will be affected by it.

This exercise is more than simply a count of how many people you've identified in the Individual Profiles. It is an exploration of how embedded the current Status Quo is in the culture.

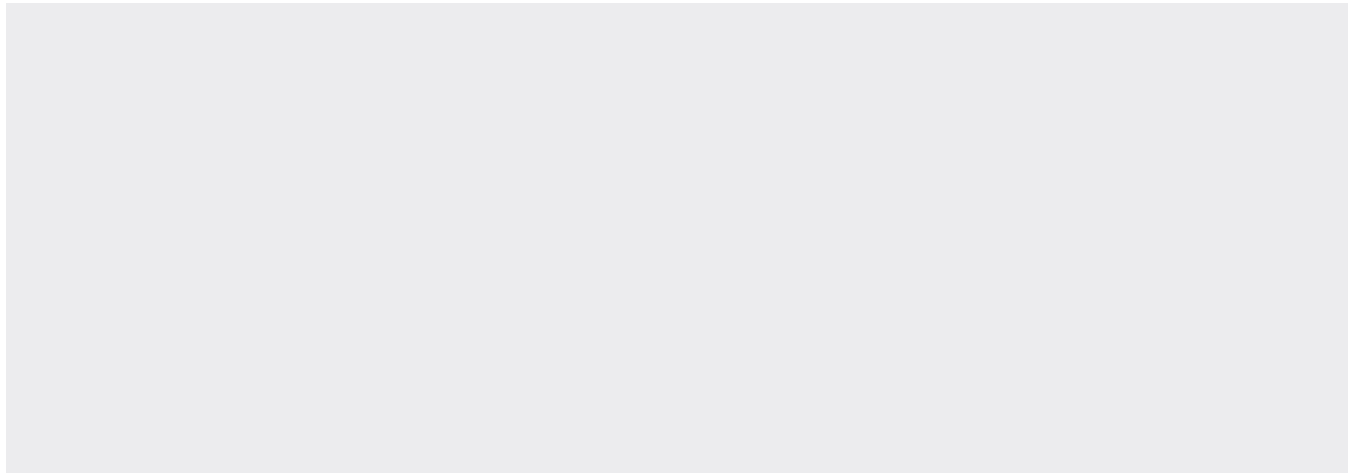
There are people who will be affected by your Change that you won't be able to identify until they make themselves known to you during the Change.

This question may be a challenge to answer at this time. In fact, you may not know how to answer it until your Change is well underway.

What Values does the Status Quo Encompass?

If the Status Quo is also a part of personal values, or beliefs, then there may be additional challenges in changing it. For example, getting rid of the Corporate Christmas Turkey is often more difficult than changing the accounting system because the turkey connects with ideas of gift-giving, Christmas, bonuses and friendship. Culture is difficult to identify, but if you examine an organization in light of relationships, then culture becomes more visible. It also becomes visible, of course, when you try to Change it.

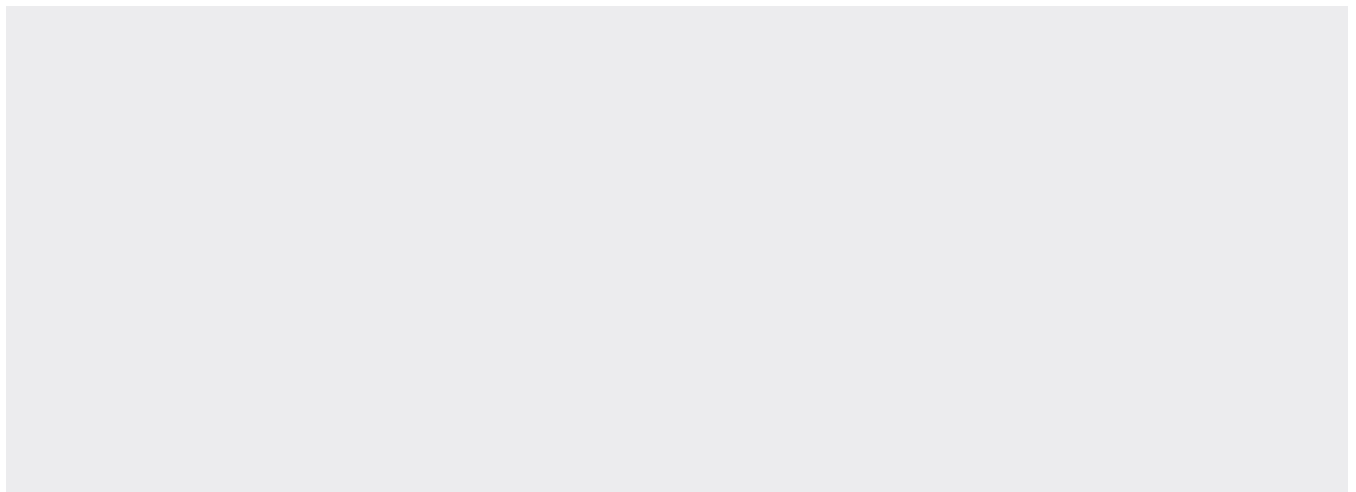
What are the core values of your organization (or of Sheltered Workshops) and how will the transition affect those values?



What Mythologies/Stories Support these Core Values?

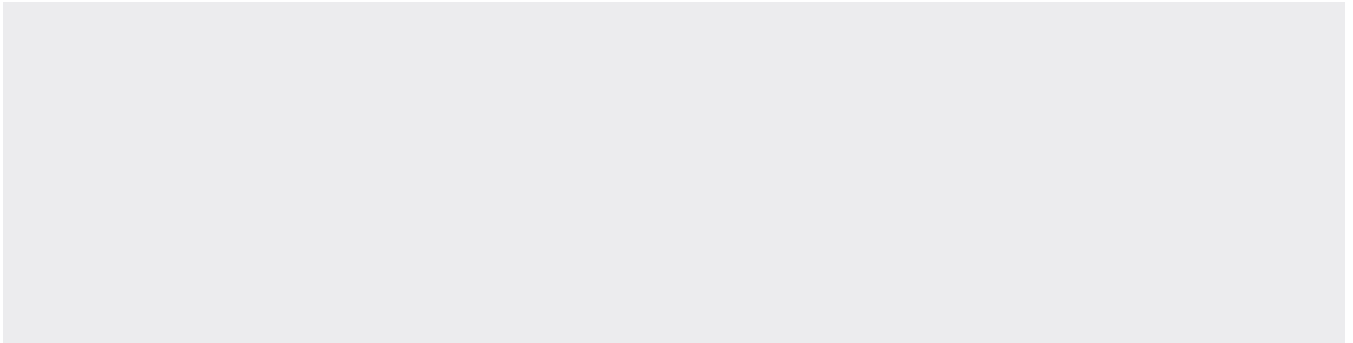
Each organization reinforces its beliefs (Status Quo) through stories. These stories usually encapsulate the core values and are held up as shining examples of the best the organization can deliver. What are those stories in your organization **and** how will they transition to the new vision of the organization?

Will those stories enable or hinder the transition to the new Status Quo?

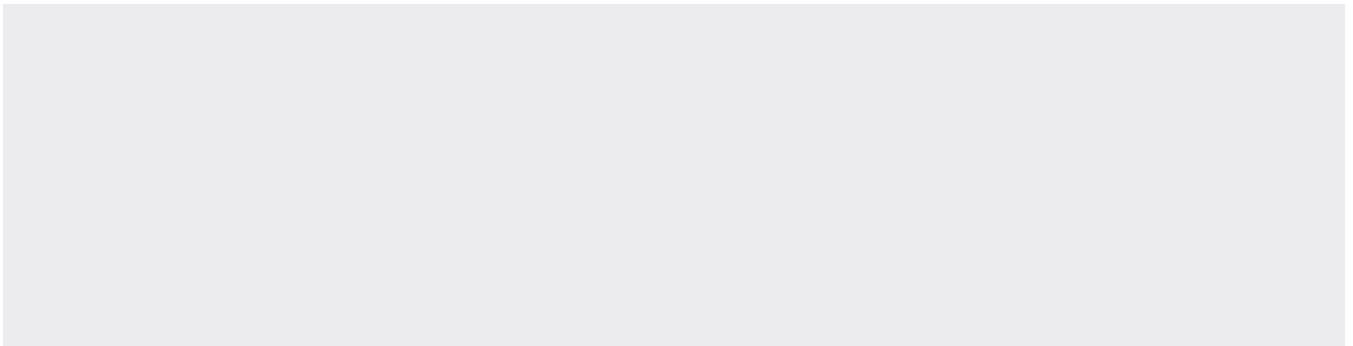


Who Are the Heroes & Heroines?

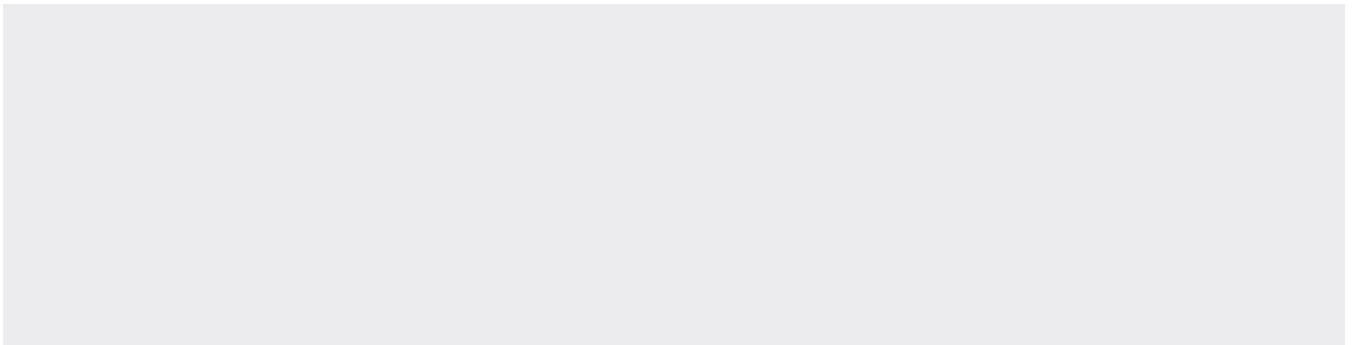
Who are the people in the history of the organization who have become major influencers?



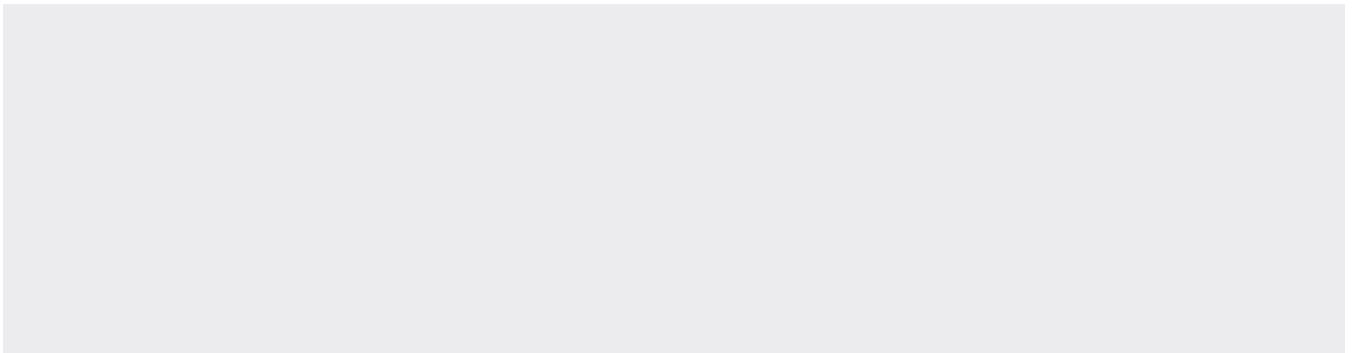
Even if they are no longer around, what stories are connected to them?



What were their beliefs regarding Change?



What would *they* think of the proposed Change?



Create a Desire to Change

According to Sir Isaac Newton, “a body at rest will remain at rest until acted upon by an outside force.” That is as much an observation about people as it is about physics. If there are no outside forces, then nothing Changes. Sometimes the key to Change is nothing more than making people aware of the outside forces. In order to Change, we need to be shaken from the false sense of security the Status Quo has lulled us into.

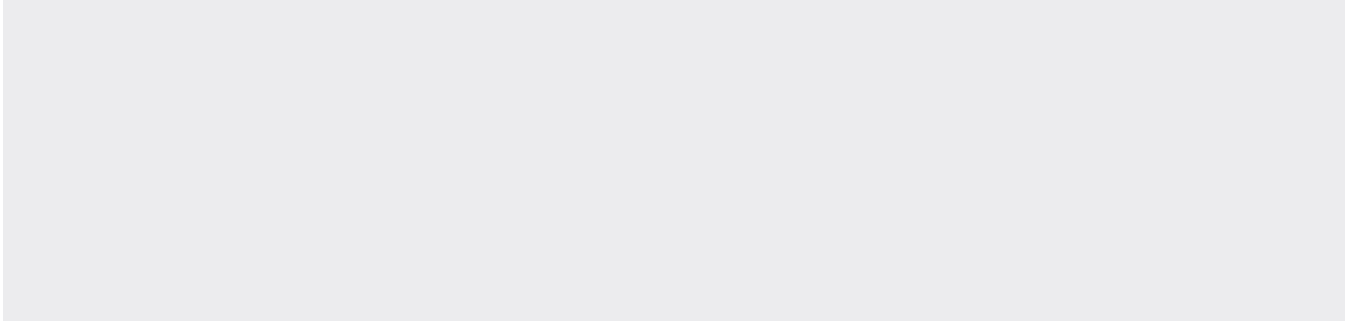
What problems exist in Status Quo?

Nothing is ever perfect, including the current Status Quo. The imperfections in the Status Quo create points of leverage that can help move a Change forward. What is it about the current situation that has been a well-known hindrance in the past? How dissatisfied is the target audience with the Status Quo? What exactly causes that dissatisfaction? If you don't know the answer, ask the target audience. They do know the answer, in great, exacting, detail.

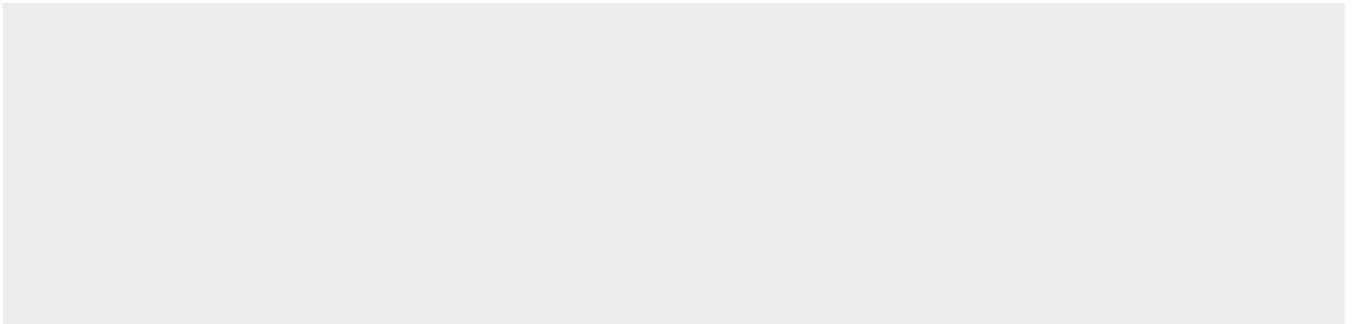
List everything that could be better in the existing Status Quo even without the introduction of **any** foreign elements.

What Are the Alternatives?

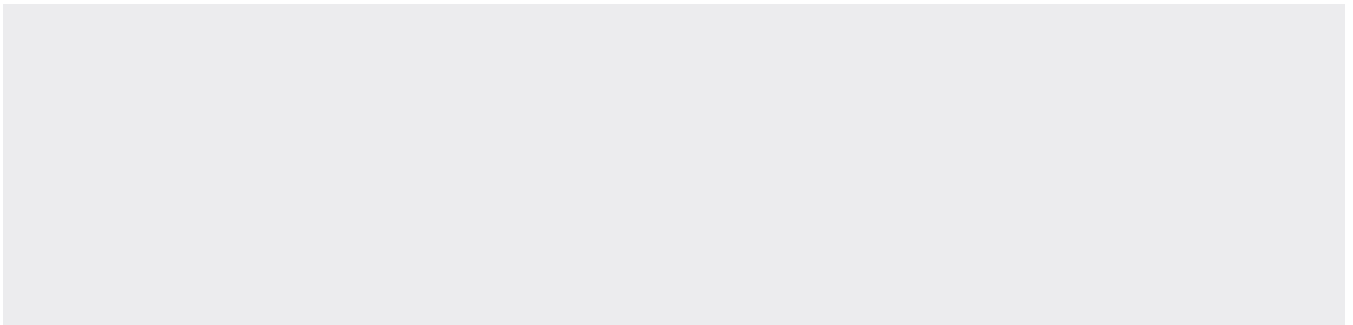
What alternatives are there to the current Status Quo? There is always more than one way to do something. Why did we choose this particular Status Quo?



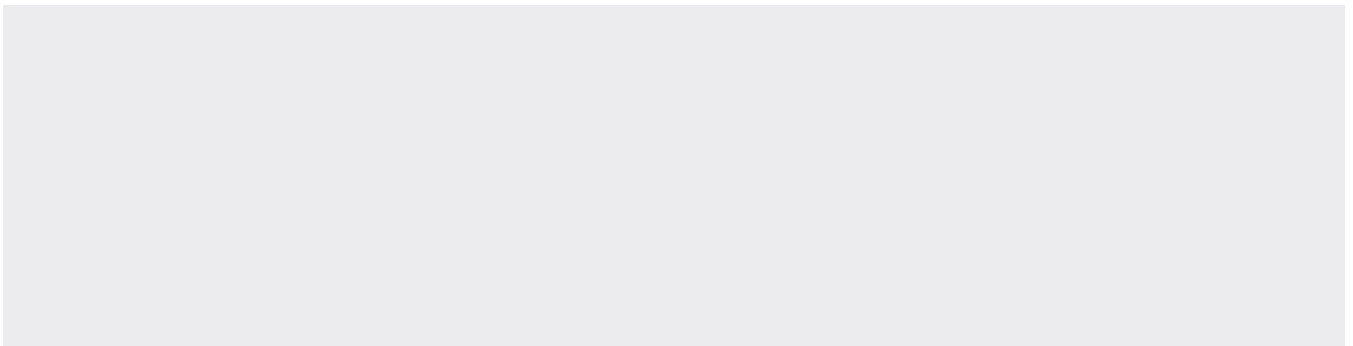
What other options did we have?



What other options can we create?



Does it really matter, in the long run, which option we choose? If not, if they are all relatively equal, why can't the target audience choose which one they should move to?



What Are the Personal Benefits to Changing?

Just as there are always problems with the current Status Quo, there will also be benefits in any new situation. It's a useful exercise for the target audience to list those personal benefits.

Collecting this information isn't something that should happen at a single point in time. It should be part of an ongoing dialogue with all involved parties. Helping people to look to the future and imagine what could be better cannot be achieved with a series of canned questions. You will have to continue seeking their active involvement.

There are two questions to return to throughout the Change process. First, do we know what will make things better for each individual? And second, how might we help deliver that benefit? The box below is a placeholder only. Answer on a separate sheet as you go through the Change process.

What Problems will the Change Solve?

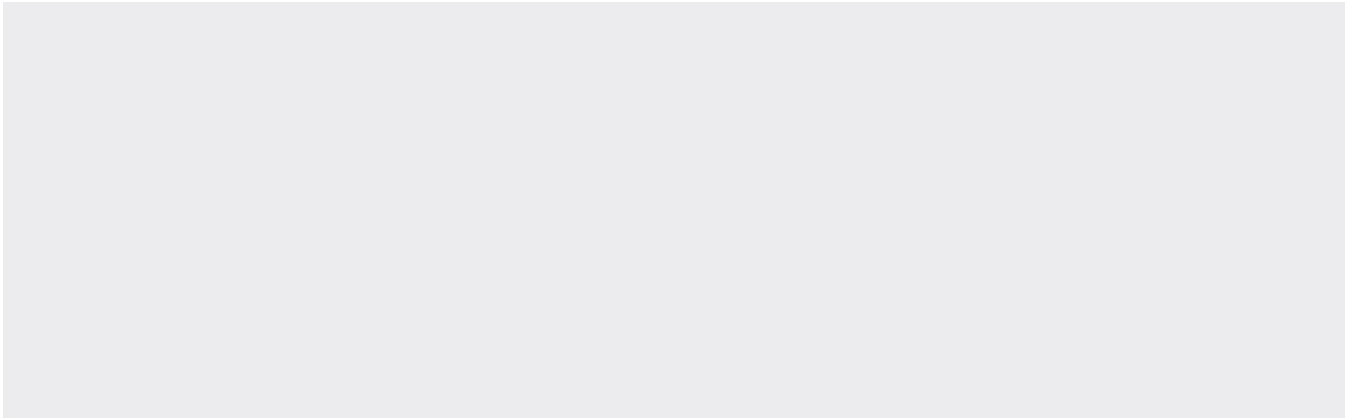
Will the Change being proposed solve existing problems? If so, how?

If not, why not? It is a mistake to think everyone involved in the Change sees all the benefits of the Change. Although it may be tedious to list every benefit, it is useful information for those who may not fully understand all the implications of the Change. **REMEMBER:** although it can be difficult to communicate enough during Change, it is **impossible** to communicate too much.

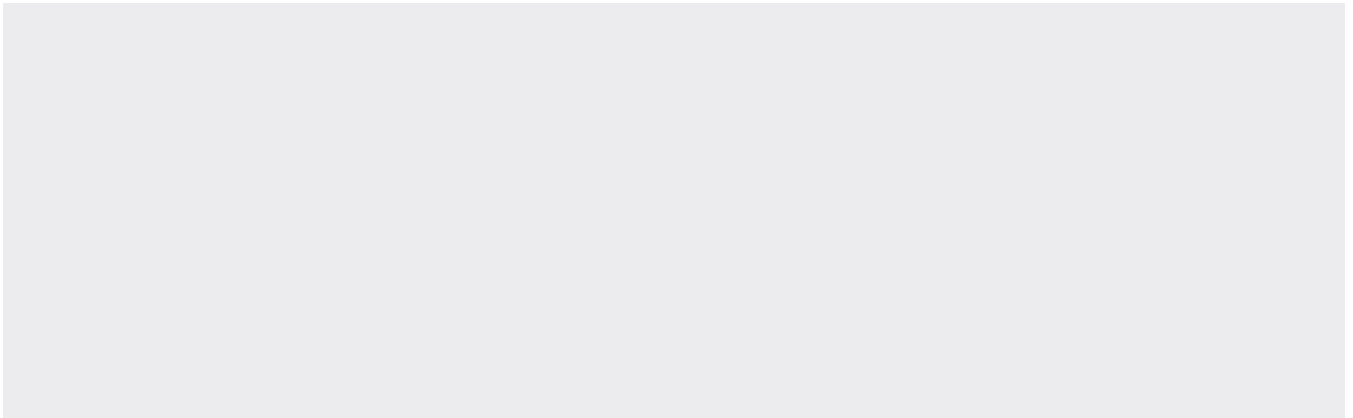
What Core Values will Change Reinforce?

Out of everything the current Status Quo provides, what will be reinforced by the proposed Change? This is a powerful piece of information. People need stability and providing information about what **won't** Change in the coming months will offer more solace in the face of chaos than you might expect.

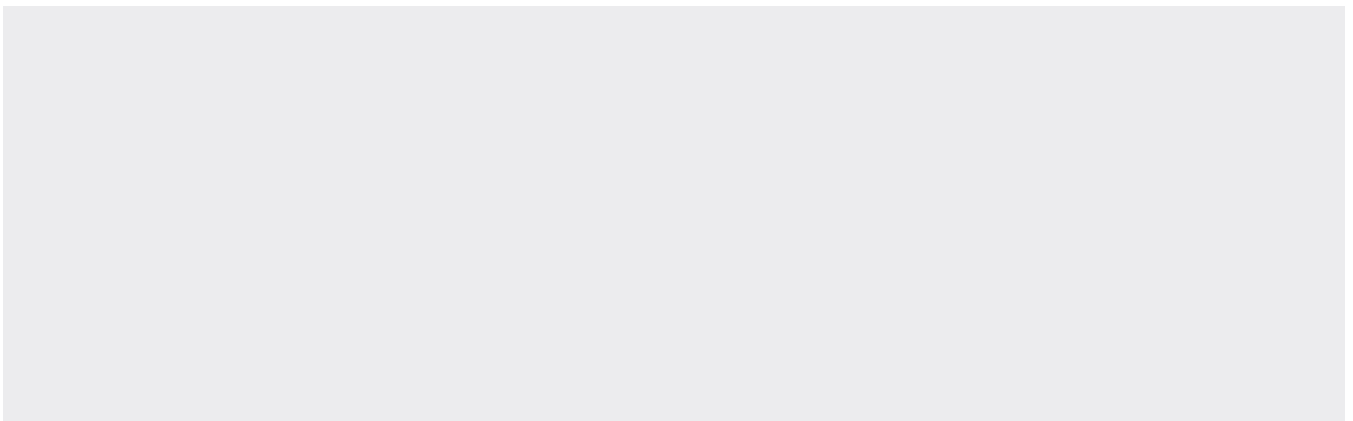
First, re-list the core values of your organization.



Next, describe how will each value be reinforced by the proposed transition?



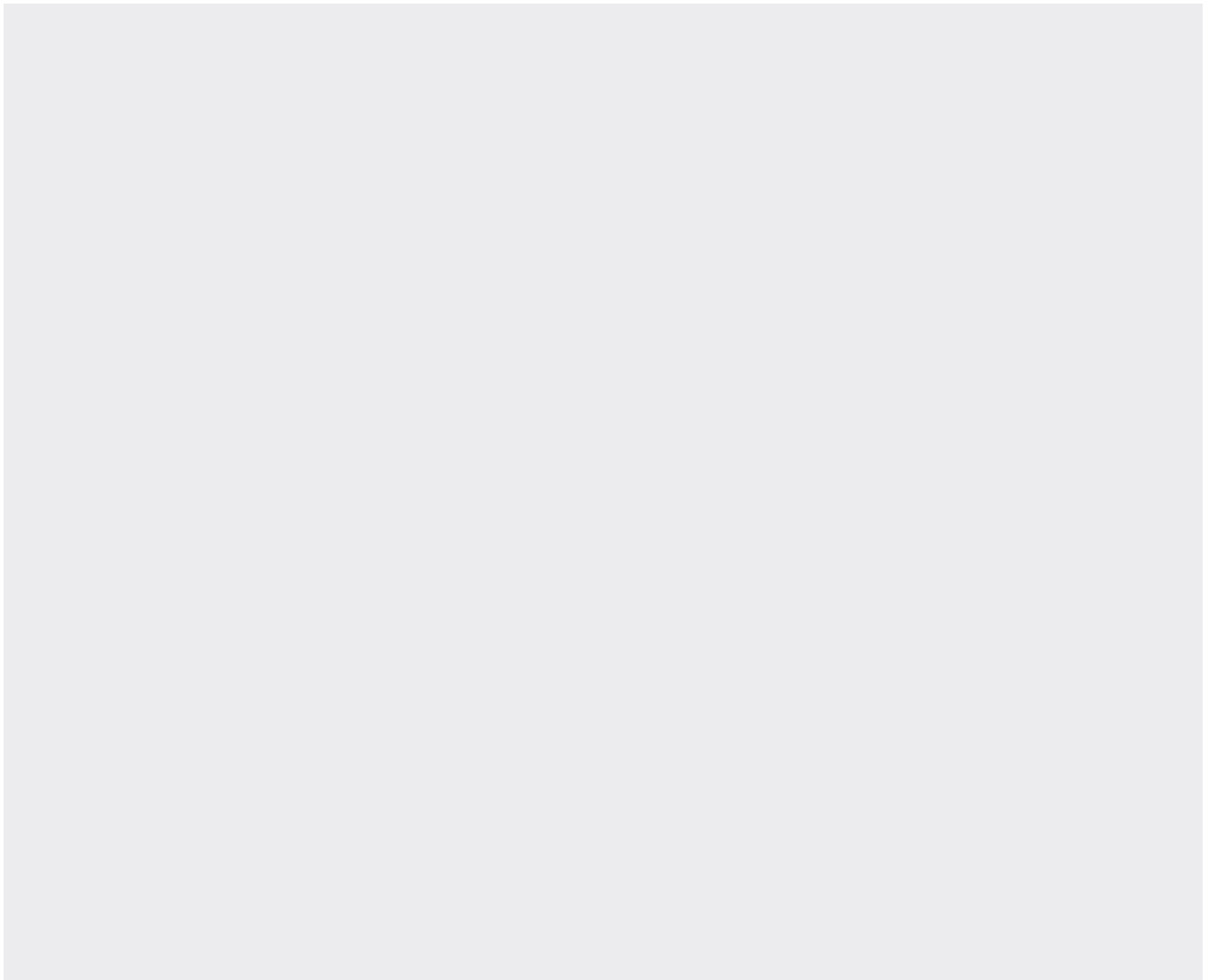
Now list which ones will **not** be reinforced by the transition and describe how important that going to be as you move forward?



What Opportunities will Change Create?

Change is not simply removing problems or issues in the existing Status Quo. It is about creating an environment of new opportunities. Do not assume the target audience can see those opportunities without being informed of them. The primary task of the Change Agent is one of a communicator. Informing and re-informing people of what is going on and why.

Now that you have considered the personal benefits of the Change and how it will reinforce key values, reiterate the key benefits of the proposed Change. Is it easier to consider these opportunities?



Note, you are addressing the same issues repeatedly. Knowing the opportunities and benefits of the Change enables you to answer any questions about it regardless of whether they are posed to you by someone supporting the objectives or resisting them. It will enable you to bring about the Change with the minimum amount of resistance.

Desire becomes Action

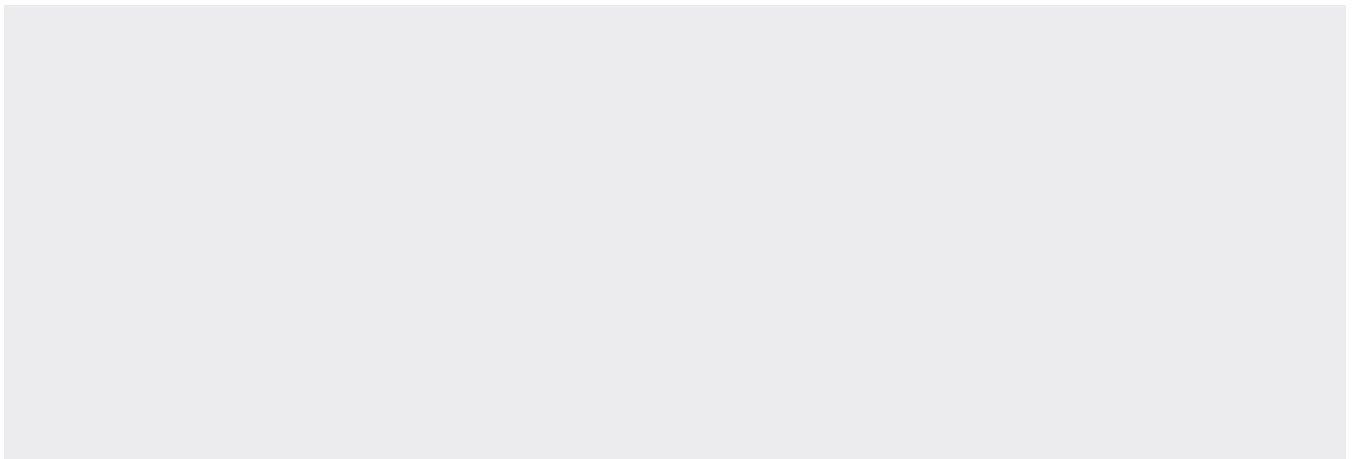
The only person who likes Change is a wet baby! A wet baby is aware of the imperfections of its current situation and will cry and scream until a Change is brought about. This analogy is a simple one, but it does contain a core of truth. If your target audience is dissatisfied with their Status Quo, they might be willing to Change to something else.

What is Their Vision of the Future?

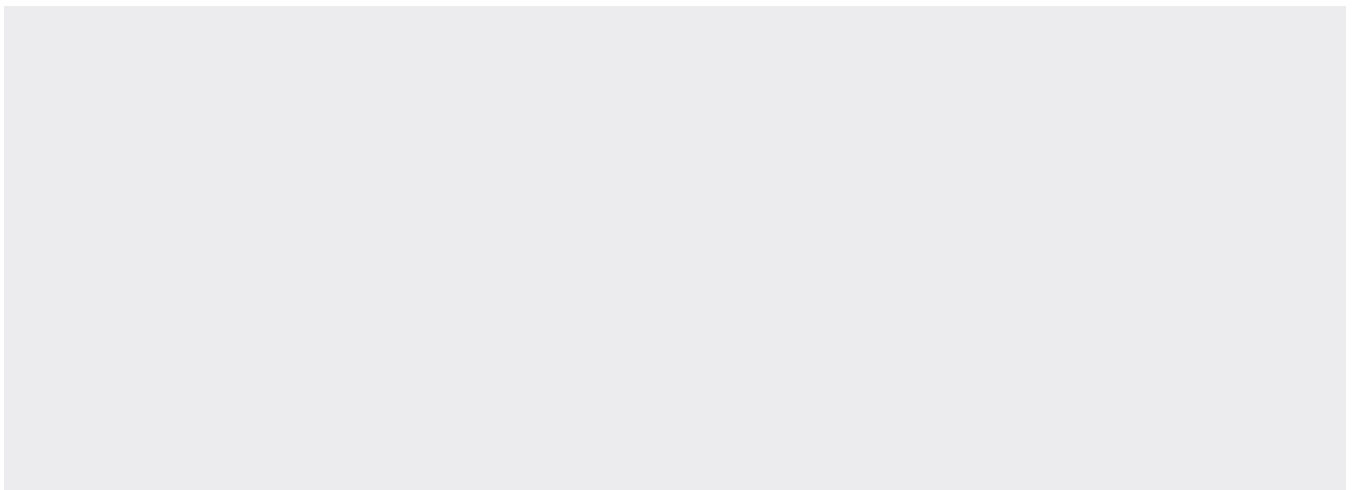
Where would they like to be in one year? In five years? Can they define what they would like their future Status Quo to look like? The better they can define it, the more detail they can describe, the more tangible it becomes.

It will take time having everyone affected by the proposed Change to answer the questions above, but it is time worth spending. In fact, the responses could suggest exactly how to move forward. Start with your immediate management team on this exercise and expand out to more people to get a clear vision.

Where would the team like to be in one year? In five years?



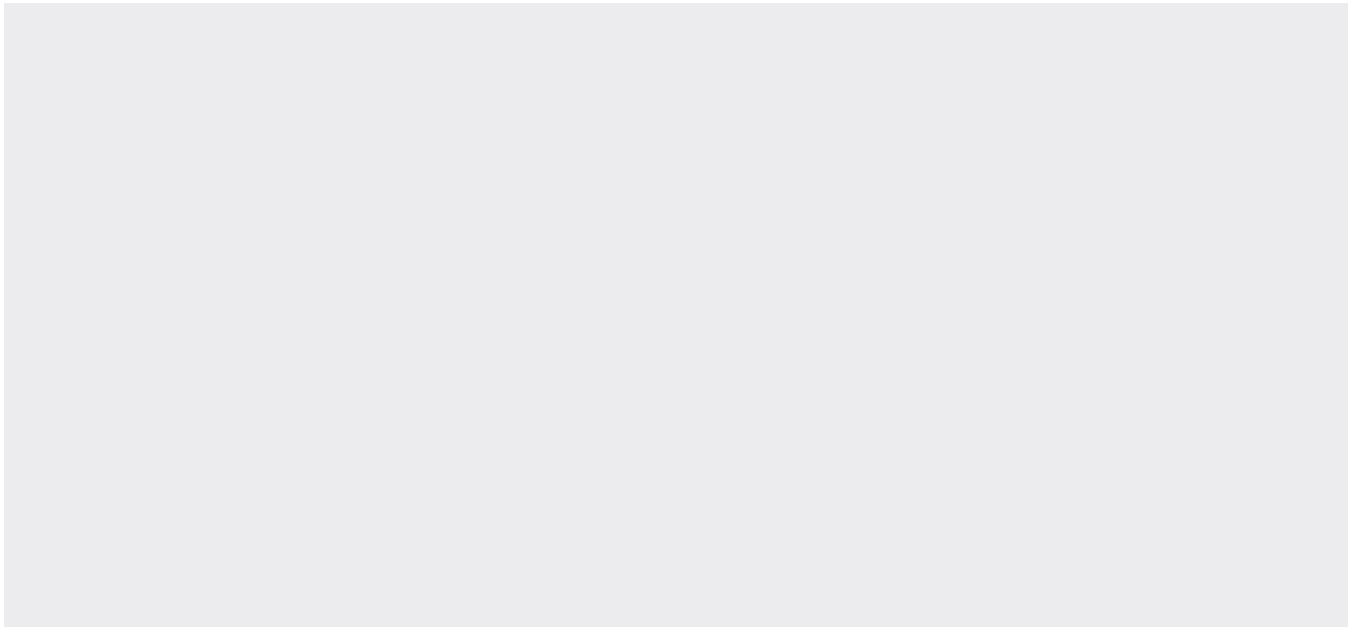
How does the team describe their future Status Quo?



What Solutions can They Suggest?

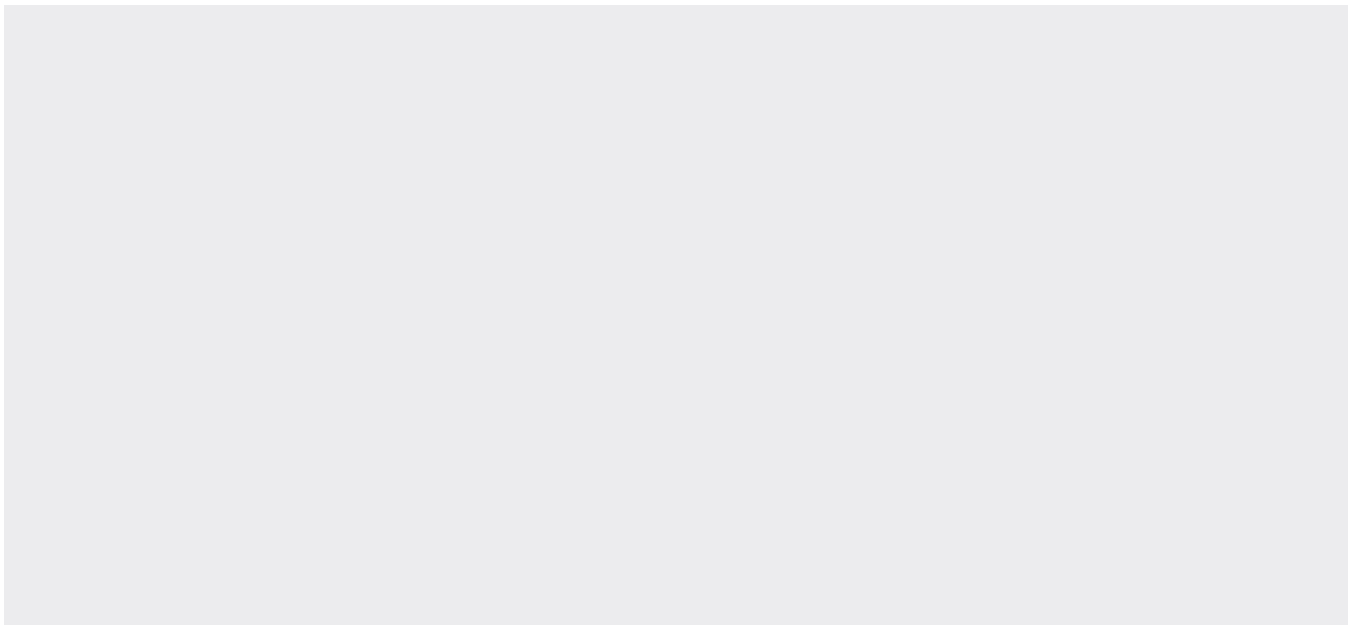
Listening to the various members of the target audience's visions of the future will empower them. If they can describe a future Status Quo, then they can suggest ways to get there. Describing how to get there becomes not only possible, but if they're sincere about their vision being a solution, then they're highly motivated to come up with a transition plan.

What does your team see as first steps?



What can **They** Do to Achieve It?

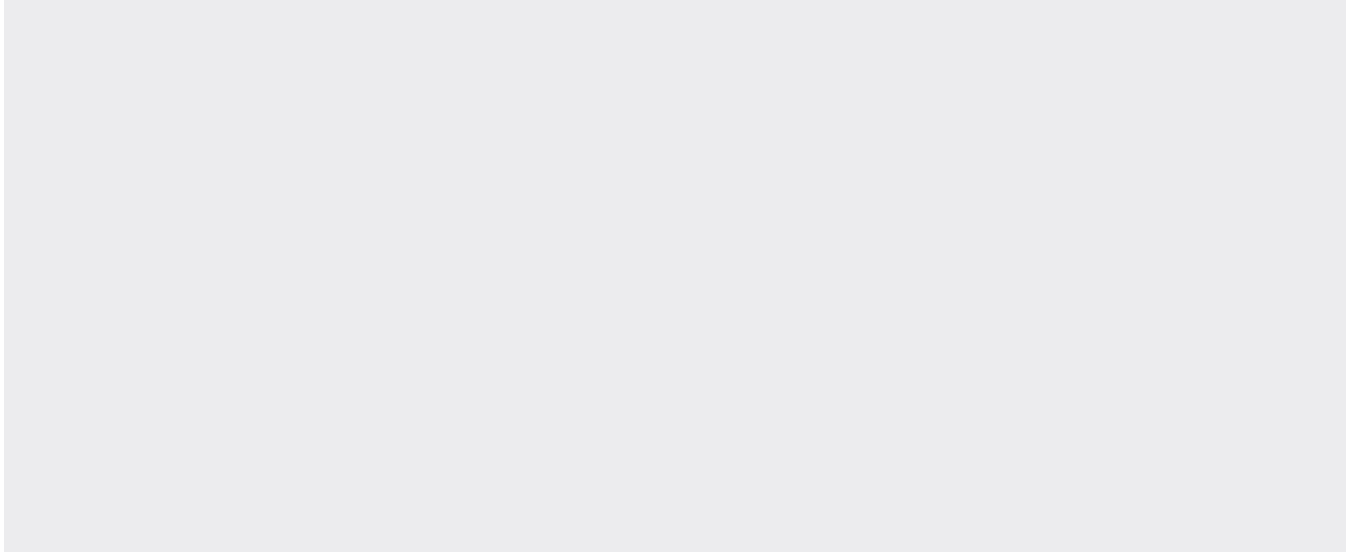
How can they become involved in their vision? What can they do to move towards it? Their answers to these questions can become a plan of action.



What Commitment will They Invest?

Change is never easy. What will team members contribute to get to the future they have described? If you have explained how they will benefit—answered the “What’s in it for me?” question—your team be willing to contribute more than you expect.

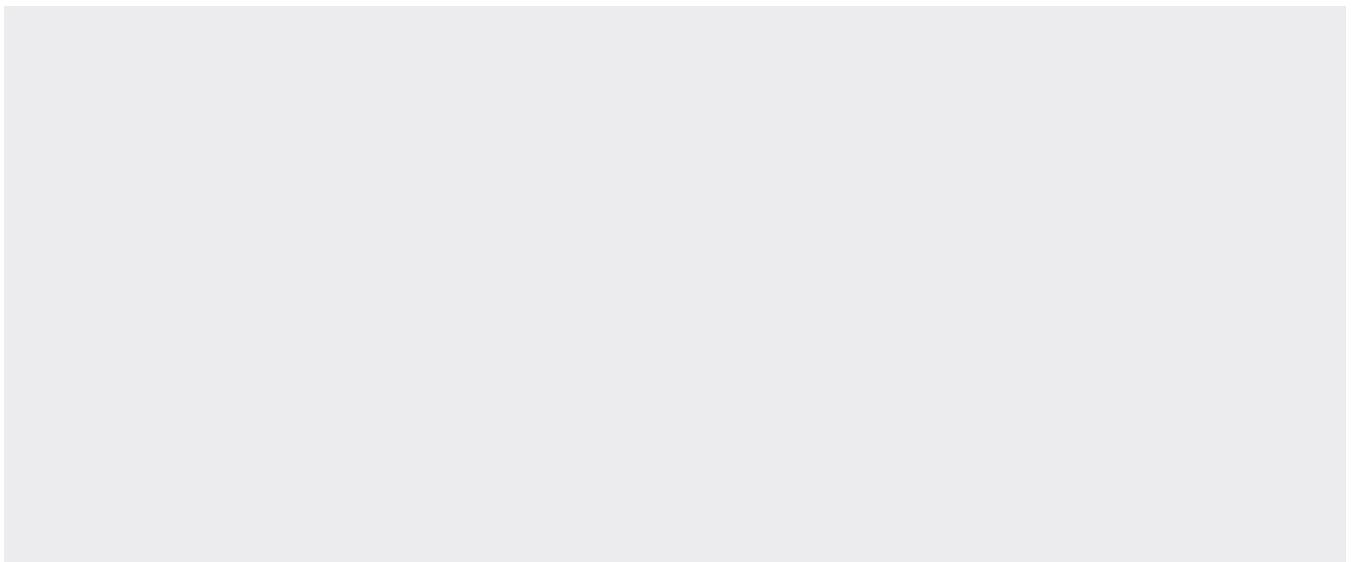
What first steps can they take? That is, what is immediately doable without additional resources?



What Do They Need from You?

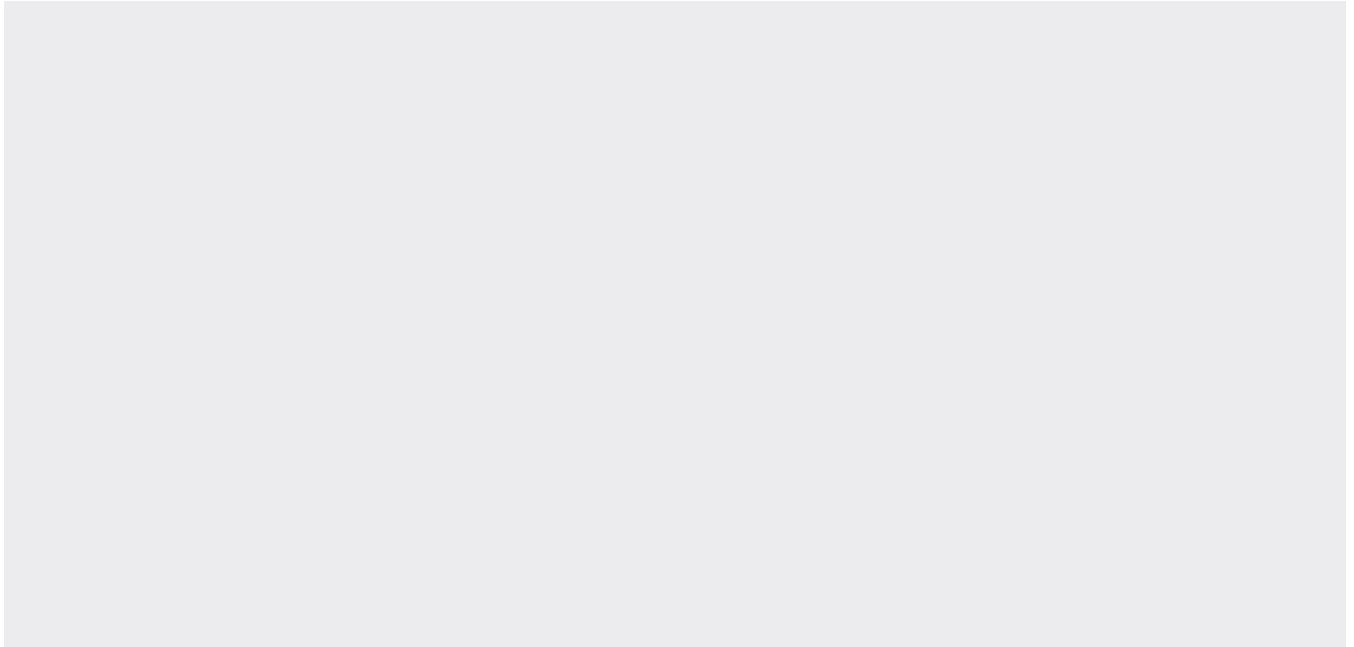
Staff need management’s support. This top-down support is crucial to successful Change. If top management does not believe in the Change, then it will be difficult to achieve, not impossible, just needlessly difficult. Before going to non-management staff with a Change, ensure the political battles in management have been resolved.

What steps could the team take with additional support? Identify both the doable steps and the support needed.



When will Their Transition Plan be Ready?

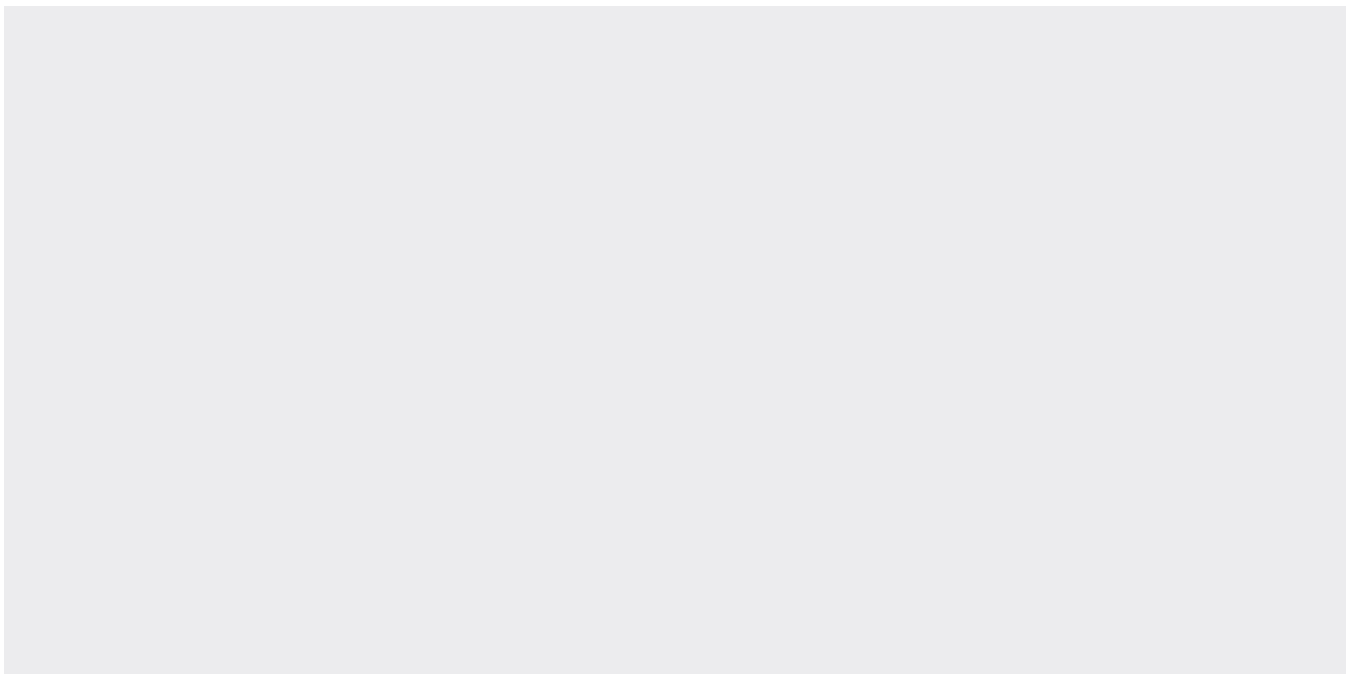
Set a date for the completion of the Change. Nothing happens without a deadline. Deadlines offered voluntarily and with full knowledge of the plan will become a commitment.



What will **Not** Change?

This is key. People need to know what parts of the old Status Quo will remain. Even if only small parts of the Status Quo will remain, don't underestimate their value to the team.

List all items the transition plan will **not** Change (processes, teams, physical workspaces, etc.).



Reinforce New Behaviours

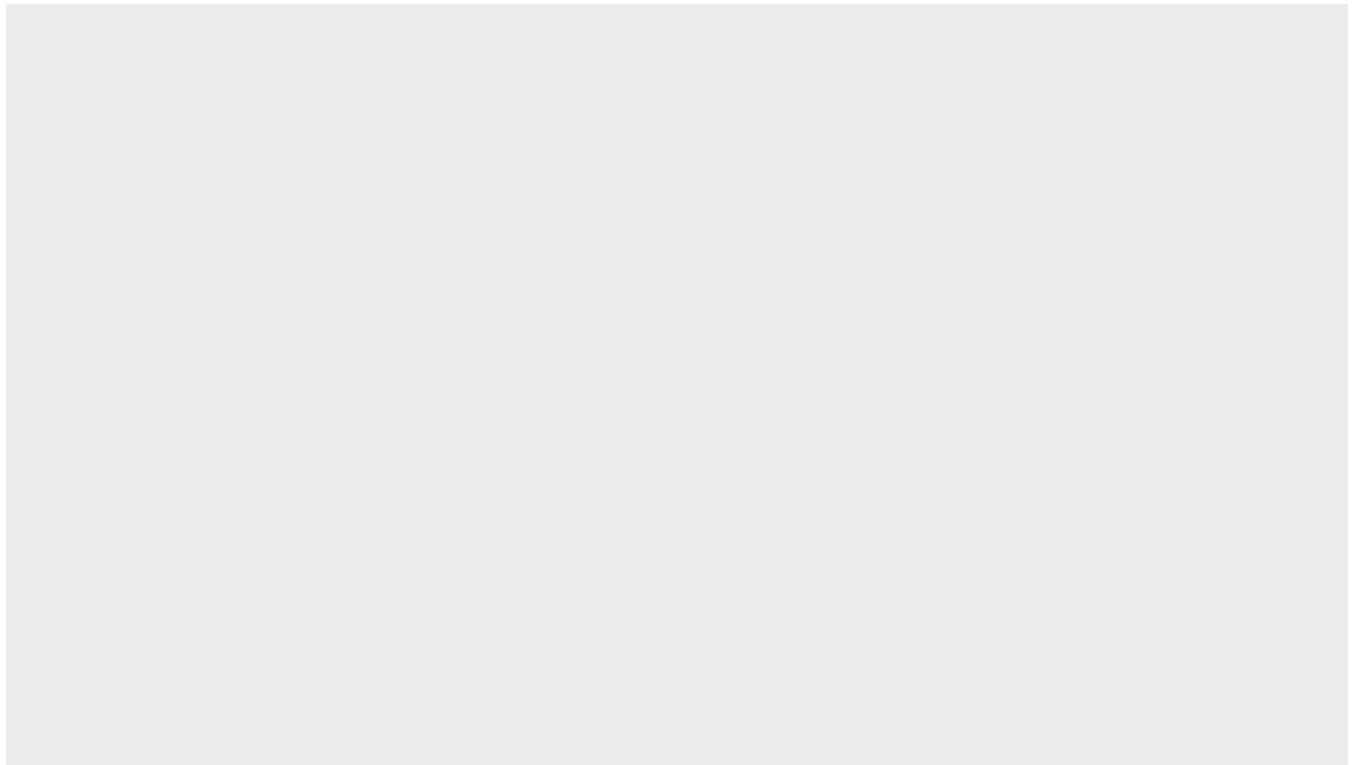
Doing something new means you'll do it wrong at first. You'll do it wrong until you learn how to do it right. This is a period of low morale for most people. There's a sense that, despite all the effort being invested, very little progress is being made. But even learning what doesn't work is an important form of progress. Reminding the teams they are making progress will continue to motivate them—and keep you, the Change Leader, motivated as well.

Reward All Attempts and Failures

We all like to know our efforts in any endeavour are being rewarded with progress towards a goal. When we are learning to do new things during the first stages of Change, there is very little progress. At the bottom of the learning curve, progress is slow.

Notice the focus on progress—attempts and failures—not simply successes. In the early stages of Change, successes will be rare, yet there will be progress in the form of missteps and mistakes, false starts and errors. These are part of the process and worthy of celebration.

Examine the early stages of the Change, what progress have you made? How did you celebrate those small movements toward the end goal?



REMEMBER: During Change, management needs to Change their behaviour from rewarding only successes to rewarding **all** attempts at progress. People working toward Change need to hear that their attempts to learn the new way of doing things are seen and appreciated.

Reward All Questions

When people ask questions during Change, they are demonstrating involvement in the Change process by seeking out additional information. Take the time to answer those questions. If management is unavailable to answer questions, people quickly believe that management doesn't care about the successful implementation of the Change. Even if that is not your intention, that is the impression those implementing the Change will have.

What questions can you expect from the organization as you move forward?

Here is a more difficult question: What questions do you **not** want to be asked? These are the ones you must prepare to answer because they will be asked. Take the time now to consider this exercise. What are the top five questions you **do not** want to be asked?

1.
2.
3.
4.
5.

Acknowledge Those who Resist

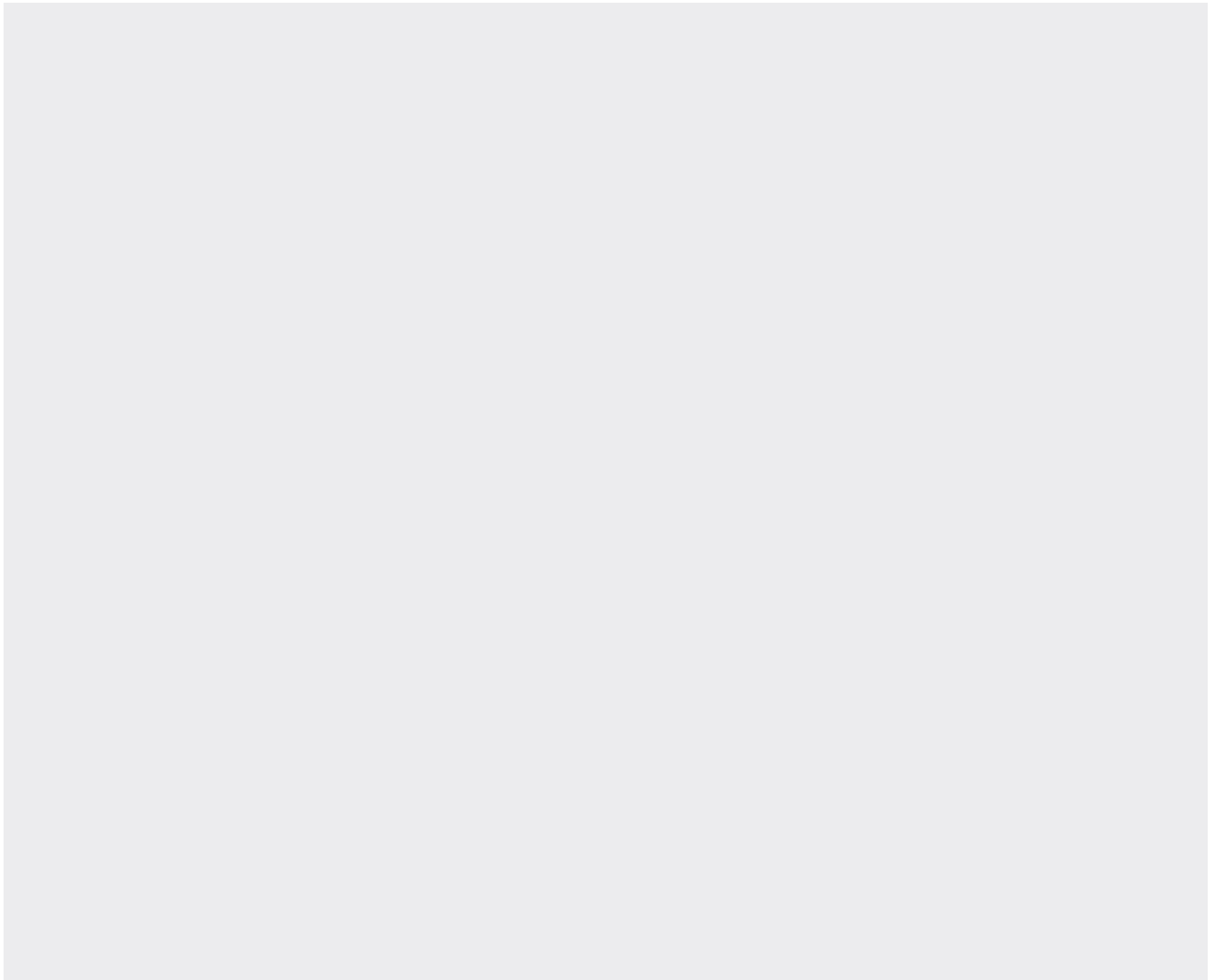
As the organization undertakes the Change, the stop-and-start progress of the early stages may undermine the Resisters' confidence. They, or others, may wonder again why this Change is necessary. This is not an indication of a bad attitude, nor is it an indicator of someone who is out to scuttle the Change. The question of why the Change is necessary is a legitimate one that may return at the early stages of implementation. Do not mistake natural, normal, healthy resistance, as a subversive attempt to destroy what you're trying to accomplish.

After a few faltering steps on implementing the Change, you are asked why the Change is necessary. Write three answers of varying lengths: 25, 50 and 100 words.

Don't Ignore Those in Denial

On page 33 of this workbook, we defined denial as the continued use of behaviours that were once effective and efficient but are no longer appropriate to the task or the new reality. It takes time for people to Change old habits.

How will you respond when you discover someone in denial? Knowing the form of your response in advance of the situation will give you more control.



“Folks don't like to have somebody around knowin' more than they do. It aggravates 'em. You're not gonna change any of them by talkin' right, they've got to want to learn themselves, and when they don't want to learn there's nothing you can do but keep your mouth shut or talk their language.”

To Kill A Mockingbird
Harper Lee

Create Closure

Getting to the beginning of the New Status Quo is a long and difficult journey that deserves celebration. In fact, two aspects of the journey are important to celebrate: saying good-bye to the past and greeting the future.

Celebrate Achievements

Today, organizations rarely undergo only one Change at a time. Generally, there is a storm of Changes. It is unreasonable to expect that one day soon, everything will settle down and you will achieve a sense of calm. So, it is all the more important to recognize when a particular Change has been accomplished and completed. The celebration can be a major party, a trip to a foreign land or just a team meeting with coffee and doughnuts. Celebrating does not require a huge financial budget. All it requires, really, is an understanding that people work better when their efforts are appreciated.

Think about the completion of your Change. What will you consider a success?

How will you celebrate your successes?

Hold a Farewell Party for the Passing of a Status Quo

Saying good-bye to the old Status Quo in some formal manner puts it behind us allows us to respectfully box it up in our memory and accept the New Status Quo without reservations. Remember, too, that Change can generate a sense of loss. When we've done something in a particular way for a long time, we don't want to forget the good experiences of the old Status Quo.

Celebrating a new achievement in a way that also includes respect for the past is the goal. We do not want to disrespect any part of the journey that contributed to the New Status Quo, including the old Status Quo starting point. The objective is to recognize that we've grown and moved forward.

“ *It is change, continuing change, inevitable change, that is the dominant factor in society today. No sensible decision can be made any longer without taking into account not only the world as it is, but the world as it will be.*

Isaac Asimov

The Communication Plan

If you've been diligent, you've answered all of the questions and generated reams of notes. You now have a great deal of information at your disposal. Answering the questions in this workbook has been a challenge, but if you have taken the time to answer them, you likely have some insights. Insights such as knowing exactly where you are, the vision you would like to work toward and the steps you want to take to move forward.

You may be asking yourself, still, where you ought to start Changing your organization. You are actually further along in that process than you may realize. If you've had conversations with even just one other person who might be involved with the Change while answering these questions, then the Change has begun.

You, and they, now know there is a different way to do things. They might be taking a closer look at their current Status Quo and asking themselves what they would change if they could. If they are asking that question, and if we take the time to listen and incorporate their answers into our plan, then we've achieved the most important phase of any Change: gaining their involvement.

You will have to condense, organize and structure all the information you have collected so far so that you have a strong sense of key points. As you continue leading as a Change Agent, you will need to Communicate succinctly. The next section will help you to structure your ongoing communications with the various stakeholders.

Be aware that each set of stakeholders will require a different set of answers to their questions. Their specific questions will be different, even though they will still fit into the general seven categories presented.

The Seven Questions of Change

What is the best way to ensure a Change initiative will transition smoothly? Communication.

How much communication is necessary? And for how long is it necessary? It is a constant activity before, during and after any Change initiative.

You already know this. If you ask your target audience to tell you how to manage the Change, they will answer they simply want to know what is happening during the transition.

But what exactly should you communicate?

You could begin with the journalist's standard questions asking who, what, where, when, how and why. These are good solid questions to begin with. But the Change Management problem requires a few others, ones that will directly address the particular psychology of the Change challenge.

Fortunately, you have spent more than a few hours answering dozens of questions, many approaching the same topic from multiple directions. You already have **all** the information you need in front of you to put together a comprehensive communications plan. Your challenge is to extract the most meaningful information from all the insights you have gathered.

The art of effective communication is answering the questions that your audience want to ask before they ask them. The following pages will support you in understanding what those questions are likely to be. Here are the most commonly asked questions specific to Change Management. Taking the time to answer these now will prepare you to face the key concerns of those facing the Change about to get underway.

1. Why is This Change Necessary?

This is the most common question you will face. That is why it has been reiterated throughout this workbook. Without a satisfactory answer to this question, people in your organization will be reluctant to do anything different.

While this question is a short one, your answer should be detailed, complete and relevant to their understanding of the Change.

Your goal when answering the "why" question is not to convince the listener that the Change is correct but to provide a clear explanation of the reasons for Changing.

Your answer will require you to explain the Current Status Quo; what the Foreign Element is; and, primarily, what would happen if we continued to maintain the Status Quo in the face of the foreign element.

Remember, the answers you provide to people using services, their supporters and their families, the community and your staff will all be different because each of their "why" questions are fundamentally different.

2. WIIFM: What's in It for Me?

This question is a potential trap for managers of the Change. People's worries and fears about how the Change will affect them personally can become distracting for themselves, others and even the Change Agents. But do avoid answering this question. If the organization or users are concerned about the WIIFM question, they won't pay attention to any other information you offer.

Consider the WIIFM question a guard at the gate to their attention. Until the guard is given the password, the information he needs, no other information about the Change will get through.

Even if we honestly have no information about the WIIFM question, you must still acknowledge that the question exists and that as soon as you have more information, you will provide it for the audience.

3. What will I be Doing Differently on Monday?

This question deserves some context. Imagine you have a vision of the future of the organization. Also imagine you are able to convince everyone that this vision is the right direction for the organization to move towards. Finally, you have been able to convince all the key players to move toward the vision, and they are all excited about it.

Now the question: What will I be doing differently, specifically and precisely, on Monday (or next Friday...or next month) to start moving us towards this new ideal?

It's a fair question. If you want people to Change, you must describe what they will be doing differently, and when those new actions will take effect. And you will have to describe them in terms that everyone can understand. If you are unable to, your vision is flawed and you will have to re-work it until it is attainable.

4. What Won't Change?

What will remain the same during this Change?

The problem here is that when faced with a Change, only unknowns seems apparent. It is easy to lose sight of the fact that only one small part of the Status Quo will be in flux and that the rest will likely remain the same.

For example, when the accounting system is going to Change, we're still going to report to the same boss, earn the same paycheque and receive the same benefits. In fact, most of our Status Quo will remain the same. This scenario is consistent with nearly all Change.

5. What Might Go Wrong?

What **might** go wrong during this Change? And what contingency plans have you put in place to mitigate those risks?

When heading into the uncertainty of Change, prepare to face errors, foul ups and messes. Being unprepared for when events go wrong communicates that you haven't thought through the Change.

There are at least three ways to manage risks: remove the possibility of the event occurring, reduce that possibility and minimize the damage when the event occurs.

Establishing what risks to manage isn't too difficult. In fact, when you announce a potential Change, almost everyone affected will want the chance to tell you what might go wrong. Risks, if we pay attention, are easy to identify.

6. What Will Hurt?

Change hurts. That's almost the First Law of Change. If we're doing something significantly different, then we're going to be at the bottom of the learning curve. Even if we pay close attention to training, support and fall-back positions, we're going to make mistakes, production will decline and we'll get things wrong.

If we pretend that the Change will be painless or that it will be "transparent to the user," as commonly phrased, users, your team and the organization will know you are either lying, unrealistic or overly optimistic. Be aware that people will be anxious and may struggle with their new incompetent self, even in the short-term.

This is an opportunity to build rapport and trust with key stakeholders. Offer support, both moral and otherwise (training etc.), and ensure they feel confident that you are empathetic to their concerns and struggles.

The most important stakeholder—the people who are supported by the organization—will see significant changes in their lives, presumably for the better. However, it is critical you do your utmost to mitigate any potential risks. To reduce the pain of this Change, do not take anything away from people before you have a better replacement.

7. Signposts—How Will We Measure Our Progress?

Change doesn't always happen quickly. It can be slow—almost glacial. Regardless of the pace you set for creating this Change, you will need a way to measure progress towards the end goal. Also, the measures are a way to provide feedback, feedback that will maintain both the motivation and the will to move forward. The question is; "How do we know we're succeeding in our efforts?"

How to Use this Schema for Communicating Change

These aren't the only questions you need to answer during a Change, but they are crucial ones. If you do not have the answers, the Change will not happen. Keep this list of questions where you can see them every time you start to craft a Change message. As you prepare, ask yourself if you are answering them.

As you prepare your Change message, you could create a slide with each question as the title. But a better approach is to write your outline then go through it line by line, noting and tabulating which of these questions it addresses. Once you have gone through your entire communication, look at your tabulation and decide which questions need more attention. This way you will ensure all the questions were addressed rather than rigidly adhering to a specific order.

The First Steps Forward

What follows is a possible sequence of events to initiate and begin moving your Change forward. Each step provides a rationale for completing that step. I won't address this timeline to any individual, but instead to your organization.

But before taking any steps, it is worthwhile understanding who the stakeholders might be. The illustration below indicates the most likely candidates, but you should complete this as it makes sense to your situation.



NOTE: Only complete this section once you have worked your way through the rest of the workbook. All the information you have acquired through your work so far is necessary for a smooth Change. Identifying resisters, influencers, pain points, defining the Status Quo etc. all of it constitutes the information you need as a foundation to move forward.

STEP 00: Complete this Workbook First

1. To gain an understanding of how Change works.
2. To understand how this Change will affect your Organization.
3. Meet with, or speak to, your peers in the Sheltered Workshop/developmental service sector. There really is no reason to attempt to do this on your own.

STEP 01: Management Team Meeting(s)

1. Share your responses to this Workbook with the Management team, resolve differences of opinion.
2. Create initial, draft statements of consensus for each item in the following list.
 - a) The key drivers for the Change are (complete a list of all drivers).
 - b) Create a vision/mission statement for this Change.
 - c) Choose a name for the Change project, use it and encourage all participants to use it.
 - d) Create a draft document with at least two paragraphs for each of the seven questions (refer to Workbook pages 73 - 76).
3. Prepare, and agree upon, your opening presentation to Staff.
 - a) Acknowledge that there is Change ahead.
 - b) Identify the key drivers (foreign elements) shaping the future of the organization.
 - c) Ask staff how they feel about what's happening.
 - d) Ask staff how they think you/they should respond.
 - e) Share what you have already accomplished, stressing that it is a draft.
 - f) Ask for, **and listen to**, staff feedback.

STEP 02: Management and Staff Meeting(s)

Your objective is to include staff in your thinking, allowing them to contribute to the Change. The more you involve staff in the Change, the more willingly they will adopt the Change.

1. Start with the presentation you prepared in Step 01.
2. Seek to achieve the same level of consensus, on the same items, as you achieved in Step 01, noting that any plan will require board approval.

STEP 03: Management and Staff Planning Session(s)

So far, you have created and shared the vision. Now it's time to create a draft plan outlining action steps.

The plan should identify key actions needed to move from where you currently are to where you want to be. Each action should have a timeline for its completion and a person assigned to ensure the action is completed. Note, the person assigned is not necessarily the person who will undertake the action. Rather, the person who will ensure it is completed in the designated timeframe.

Items that should be included the plan are as follows:

- Key objections you expect to encounter from each category of stakeholder
- Responses to all the identifiable objections
- A timeline, even if it is only an estimate
- Identification of both resistors and potential supporters
- Identification of specific service areas and/or people you support who are prime candidates for pilot projects

STEP 04: Management Planning Session(s)

1. Verify that there is still management consensus after incorporating staff input

NOTE: Going back on anything agreed to in the staff meeting would be a damaging mistake at this point. It would destroy trust at the start of what will be a long, sometimes painful, process.

2. With plan in hand, prepare a presentation for the Board of Directors. Cover the same information as the one presented to staff, but more succinctly.

NOTE: There is an argument for meeting with the Board **before** meeting with staff. However, doing so will result in presenting staff with a pre-defined Change, which allows little room for staff to have ownership of the Change.

By speaking with staff first, noting that the final decision is up to the Board, you can defend your plan when presenting to the people you report to as well as their managers. Stating that the staff is already willing to work with the presented plan is a good reason for the Board to accept the plan as is.

STEP 05: Management Presentation to the Board.

1. If possible, include one or two senior staff members in this meeting. This will create transparency of the process right from the beginning. Closed meetings do not engender trust.
2. Present what was created in Step 04:
3. Seek acceptance of the Plan and be prepared to defend it as strongly as possible. Having a staff member present means they can play an active role in defending the plan. They will also be aware that, if the plan is modified, you did your best to protect what management and staff attempted to create.

STEP 06: Management Meeting(s)

If the Board of Directors accepted the plan without modification:

- Plan a celebratory meeting with Staff because their plan was accepted.
- Get their input on next steps.

If the Board of Directors accepted the plan with modification:

- Plan a celebratory meeting with Staff because their plan was accepted with some modifications.
- Explain the modifications and the reasons why they were necessary.
- Get their input on next steps.

If the Board of Directors did not accept the plan, go back to Step 01.

- Without Board support there is no Change.

STEP 07: Management and Staff Meeting(s)

You have already cleared the first hurdle: you have a Board-approved Plan. It is cause for celebration, and the project is launched in this meeting.

NOTE At this point the plan is a roadmap, but it does not represent the final journey. Along the way, you will make detours to avoid problems and obstacles and also take advantage of new opportunities that arise.

STEP 08: Management and Staff Meeting(s) for Family Presentation

Prepare for the first meeting with family to bring them up to speed on how the Sheltered Workshop industry will change in the coming years.

Critical to this meeting is a collection of success stories you have gathered from your associates in the industry. Ideally, you'll have two or three stories of people that reflect a range of people you support. You want to be prepared to respond to specific objections that will start with, "My child is different..."

Create a list of every objection a family might have as well as your responses.

Your presentation should contain the following;

- A history of your organization.
- The key drivers of the Change.
- A statement of your core values and how you will protect them.
- An outline of your plan, making it clear that both staff and the Board support it.
- Success stories and how you will emulate the best of the industry.
- How the Seven Questions template will be the foundation of this presentation.

Ensure you plan to provide the families several opportunities to ask their questions throughout your presentation.

NOTE: There is value in asking for volunteers for participation in pilot projects; however, there is also considerable risk doing this in a group meeting. If nobody steps forward, you've just taken a step back. If you **know** someone will want to be first, then by all means ask them in public, but if you're not certain, wait for a private moment after the meeting.

SUGGESTION: Speak to the families most likely to support the change in advance of the meeting only if you can trust them not to break the news in advance of the meeting. Your ideal partner families will be those who are both open to the idea and influencers within the family community.

STEP 09: Management/Staff Meeting/Board of Directors Meeting(s) with Families

I've included management, staff and Board in this meeting as a way to show solidarity around the ideas you will present.

Why meet with families before starting a pilot?

Involvement in Change is critical for success. Families care deeply about their loved ones who are accessing your services: their safety and security is paramount. The families may be anxious about the Changes you are about to make. You need families on your side. Any family can stop any pilot, simply by removing them from your organization.

There are several objectives for this meeting.

1. Bring them up to date on what is happening in the industry.
2. Allow them to voice their objections.
3. Allow them the opportunity to provide their input.
4. Allow them the opportunity to benefit from the Change first.

In the meeting itself, you will:

1. Present what you prepared in Step 08.
2. Provide a handout containing the key information and resources.
3. Allow for all the time necessary to answer all the questions they might have.
4. Identify those families who might be willing to move ahead in a pilot project if you do not ask for volunteers.
5. Schedule follow-up meetings with the families who volunteer or who you have identified as potential partners for your pilot project.

STEP 10: Initiate your First Pilot Project or Initiative

We touched on this in the previous step: identifying the candidates most willing to participate. You may have several families of those you support willing to participate. You know their potential for success.

Keep in mind that, although there are many within your Sheltered Workshop programme, the goal is for **everyone you support** to enjoy a more independent life. For your pilot project, you must identify the person **most likely** to succeed. The key attribute your volunteer will have is an eagerness for independence and a desire to grow beyond their existing boundaries.

With several candidates to choose from, you could return to the first activity list you filled out for them on page 5. If the candidate only knows the world through the lens of Sheltered Workshop or other segregated care setting, you will have to adjust the perspective “where did they go” “where would they like to go” and “what would they like to do.”

The challenge is that they may not know what options are available to them. How you proceed next depends entirely on the abilities and desires of those you support. Do they wish to be independent? Do they even know what is possible? Do they wish to support themselves?

Everyone is unique so there can be no standard approach that will work for each person, but every pilot must start by finding out what works for that individual.

Once you have your pilot project set up, you can follow the process repeated several times in this workbook.

1. Identify an audience to whom you will present the pilot.
2. Tailor your presentation to meet the goals and objectives you have for that audience.
3. Identify their objections to your proposal and prepare responses.

Potential audiences might include those you support and community business leaders who might employ them.

STEP 11: Initiate Your Next Pilot Project or Initiative

Once your initial pilot project is underway, you can prepare to undertake the next one. You may start one immediately or wait for a specific period of time to gain insights from your first pilot, insights that might make the next project (and the next) move forward more smoothly. Whatever plan works best for your organization, follow the Steps 1 - 10 outlined here. This time, though, some of those meetings will have the added insight of feedback from pilots that are underway.

Your first few pilot projects will be difficult because your organization is new at this. However, after a few successes, you and your team will feel a reduced sense of incompetence.

Plan on setting up a feedback loop from the different pilot projects. Sharing what worked—and what didn't—this will help to inform decisions on later projects. This will set each later project up for success and return a sense of competence for all participants.

Finally, as stated earlier, remember to celebrate every success with Management, staff, Board of Directors, those you support, families and anyone else involved. This will keep everyone motivated throughout the first few pilots.

In Closing

The lists of steps, questions, strategies, suggestions and guidelines provided in this workbook were created for your organization's move from the Sheltered Workshop approach to the in-community approach for those you support. However, they are applicable to **all** Changes. They are useful if you are considering moving your family from one city to another, implementing a set of Policies and Procedures for PC usage, automating a process or changing the E-mail system throughout your organization. Change is change.

These tips are also, by the very nature of Change, incomplete. They address some key concepts but they are mere sketches of what should be considered during any Change. To get the full picture of what is required during a specific Change, we must be involved in that particular Change.

It has been said that Change Management is an oxymoron. The aim of this workbook is to help you see that you can have a positive impact on the process.

APPENDICES

Additional Change Process Models

The Virginia Satir Model is not the only Change Model we could use to understand how people, and organizations, respond to Change. If you wanted to become a master at Change Management I'd suggest a lifelong learning attitude and suggest several dozen books, both non-fiction and fiction, as part of your studies. The more we know how people respond to Change in general, the more competent we become at steering organizations through Change both big and small.

While an indepth study of Change Process models would be useful, there's a risk of losing focus on the specific Change you're facing. Therefore, our goal in this workbook was to provide just enough background on Change so that you didn't embark on a large Change initiative blindfolded.

Another Change model well known in North America is the Kübler-Ross Grief Cycle. This model was originally intended to describe the emotional responses people have when being told they have a terminal illness of some sort. The identified stages are;

Denial – At first a non-acceptance of the news

Bargaining – An attempt to regain control over their situation

Anger – Being 'angry' about the situation is a normal respond

Depression – There's a sense that we cannot regain any control – we lose hope.

Acceptance – We decide to act as best we can with the now accepted situation

While the above sequence of emotions is a common one, the model is not as applicable to organization situations. Though it's easy enough to see each emotional state being played out throughout any organization where the Change being proposed is a) perceived as immediate, b) negative and c) it has arrived without warning.

Here are some additional references;

Change Model References

For completeness sake, it's worth noting that the Satir Change Process model is not the only one worth considering. There are many others:

Kotter

An eight step methodology for bringing about a Change within Organizations
Leading Change - John P. Kotter - HBR Press

ADKAR

A five step overview of the Change Process
A proprietary model from Prosci
A Model for Change in Business, Government and Our Community
Jeffery M. Hiatt - PROSCI Learning Center Publications

Senge

Systems Thinking for Organizations
A way to gain a deeper understanding of how organizations work.
The Fifth Discipline - Peter Senge - Crown Business

Rogers

The Source for all things related to the diffusion of ideas within a community
For scientific evidence and anecdotes surrounding the adoption of new concepts.
The Diffusion of Innovation - Everett Rogers - Free Press

Pascale & Sternin

At the forefront of Change Management thinking to bring Change about inside large communities.
The Power of Positive Deviance - Pascale & Sternin - HBR Press

There are other thought leaders who haven't formed their own models to explain Change, but do offer cogent commentary:

Atul Gawande

The Checklist Manifesto - Picador
Why read? Real World example of the power of involvement during Change

Gerald Weinberg

Becoming A Technical Leader - Dorset Press
Why Read? Becoming a better manager of both Projects and People

Jerry B. Harvey

The Abilene Paradox - Jossey-Bass Publishers
Why Read? The Iconic article of Peer Pressure Thinking within organizations

Change Model References

For completeness sake, it's worth noting that the Satir Change Process model is not the only one worth considering. Below is a list of other formal change models available.

ADKAR Change Management Model, <https://prosci.com/adkar/adkar-model>

Hiatt, Jeffrey M. *AKDAR: A Model for Change in Business, Government and Our Community*. Loveland, CO: Prosci Inc. 2006.

Kotter, John P. *Leading Change*. 1996.

Eight step process for leading change,

<https://kotterinc.com/8-steps-process-for-leading-change/>

Pascale, Richard, Jerry Sternin, and Monique Sternin. *The Power of Positive Deviance*. Boston: Harvard Business Press, 2010.

Rogers, Everett M. *Diffusion of Innovations*. Fifth Edition. New York: The Free Press, 2003.

Senge, Peter M. *The Fifth Discipline: The Art & Practice of the Learning Organization*. New York: Crown Publishing, 2006.

Introduction to systems thinking,

<https://youtube.com/watch?v=eXdzKBWDraM>

Here is a list of works by other thought leaders who haven't formed their own models to explain Change but do offer cogent commentary.

Gawande, Atul. *The Checklist Manifesto: How to Get Things Right*. New York: Metropolitan Books, 2009. - Picador

Harvey, Jerry B. *The Abilene Paradox and Other Meditations on Management*. New York: Jossey-Bass, 1996.

Weinberg, Gerald M. *Becoming A Technical Leader: An Organic Problem-Solving Approach*. USA: Leanpub, 2014 - 2016.

About the Author – Peter de Jager

Peter de Jager is a keynote speaker/writer/consultant on the issues relating to the issue of managing change of all shapes and sizes in all types of organizations. He has published hundreds of articles internationally on topics ranging from Problem Solving, Creativity and Change, to the impact of technology on areas such as privacy, security and business. His articles have appeared in *The Washington Post*, *The Wall Street Journal*, *The Futurist* and *Scientific American*.

He is best known to IT and Fortune 500 audiences for his efforts to create responsible awareness of the Y2K issue—for which he received several awards from IT associations and government agencies.

In addition to presentations and seminars on the topics above, Peter has written dozens of regular columns. These have included *Association Trends*, CIPS across Canada, *Enterprise*, *Globe & Mail Online* and *Municipal World*.

Peter has spoken in more than 40 countries and is recognized worldwide as an exciting, humorous, provocative and engaging speaker. His audiences have included the World Economic Forum, The World Bank and The Bank for International Settlements.

His presentations and workshops are highly interactive, fun, irreverent to mistaken ideas and, most distinctively, **provocative**. He entices the audience by demonstrating conflicts between their stated beliefs and behaviours, and to think differently about what they thought they knew. You can view much of his work at www.vimeo.com or contact him at pdejager@technobility.com or at 905-792-8706.



odenetwork.com

