Change Management

Preparation

Review Reference Manual

Equipment, Materials, Supplies

❑   Newsprint, Easel. Markers, Masking Tape

Exercise Preparation

❑   Review *Exercise 1: Cycle of Change Interventions*

Room Arrangements

Participants should be seated at tables in groups of even numbered people.

Overview

Purpose

The purpose of this module is to enable participants to help a team understand and implement change.

Objectives

At the end of this module participants will be able to:

- Discuss concepts of change.
- Describe the cycle of change.
- Select interventions to promote change.
- Discuss different responses to change.
- Explain a process for planning and implementing change.

Content	Time
Introduction	5 minutes
Understanding Change	15 minutes
Cycle of Change and Interventions	25 minutes
Understanding Responses to Change	5 minutes
Planning and Implementing Change	5 minutes
Benefits of Effective Change Management	5 minutes
	Total time: 60 minutes

Time/Materials   Content/Activities

Introduction

DISCUSS the purpose, objectives, and overview of the content.

5 minutes

Purpose

Slide 1

TELL participants the purpose of this module is to enable participants to help a team understand and implement change.

Objectives

Slide 2

DISCUSS the module objectives from the reference manual.

Overview

TELL participants that in this module change will be addressed from two points of view. First, teams will be discussed as change agents who identify, recommend, and implement changes intended to increase health worker productivity and quality of healthcare delivery. Secondly, changes occur within the team over time and it is necessary for coaches to recognize these changes and intervene appropriately to keep the team working effectively.

Slide 3

PREVIEW the module topics:

- Understanding Change
- Cycle of Change and Interventions in the Cycle of Change
- Understanding Responses to Change
- Planning and Implementing Change

- Benefits of Effective Change Management

Understanding Change

15 minutes

Slides 4-6

Role of Improvement Teams

DISCUSS that improvement teams identify, recommend, and implement changes. Refer to the Reference Manual for background information.

Slide 7

Role of an Improvement Coach

DISCUSS the role of the Improvement coach in facilitating and training the team to be effective change agents. Refer to the Reference Manual for background information.

How Change Occurs

Slide 8

DISCUSS the following mechanisms of change and **ASK** participants to share examples of each.

- Change by exception
- Incremental change
- Pendulum change
- Paradigm shifts

(Be sure to give the example of the introduction of improvement as a possibility for a paradigm shift).

Slide 9

What is Being Changed?

ASK *each* participant to share at least one way in which his or her organization has changed over the past year. As examples are presented, **WRITE** them on one of four sheets of newsprint, according to the following categories.

- Individual task behavior
- Organizational processes
- Strategic direction
- Organizational culture

Note to Instructor: Don't name the categories until after they have finished giving examples. Be sure each participant names a change.

POST the four sheets of newsprint on a wall. These examples will be used for the following discussion and for a later discussion on the cycle of change.

ASK participants if they can see any similarities among the items you grouped together.

SUGGEST the names for the groups. As the categories are named, additional examples can be elicited particularly from the categories that didn't have many examples.

SUMMARIZE by saying a improvement team may have an impact in each of these areas.

Cycle of Change

25 minutes

Slide 10

DISCUSS the four components of the cycle of change, based on the reference manual information..

- Equilibrium
- Ending of Old Ways
- Transition
- Beginning of New Ways

REFER to the posted four sheets of newsprint that list the types of changes participants said were occurring in their organizations.

ASK participants if they can recognize which stage their organization might be in with respect to their identified change.

ASK for several examples and be sure that each participant has identified a stage for their organizational change.

Exercise 1: Cycle of Change Interventions.

Exercise 1: Cycle of Change Interventions

INTRODUCE the exercise. (5 minutes)

- **TELL** participants he purpose of the exercise is to practice selecting interventions based on the cycle of change model.
- **TELL** participants they will first work individually and then in pairs.

CONDUCT the exercise. (10 minutes)

- **TELL** participants to turn to *Exercise 1: Cycle of Change Interventions*
- **ASK** participants to write their example of a recent organizational change on the appropriate page of the exercise. Each page corresponds with a different phase in the cycle of change.
- **CHECK** to make sure each person has completed this instruction.
- **ASK** participants to review the possible interventions and select at least one that would be appropriate for their situation.

SUMMARIZE the exercise. (10 minutes)

- **ASK** each person to share with a partner what intervention(s) they selected.
- **ASK** two participants whose examples represent each phase to share with the whole group their intervention selections and the thinking behind their selection.
- **PROVIDE** feedback and additional information from the Reference Manual as appropriate.

Understanding Responses to Change

5 minutes

Slide 11

DISCUSS the three general ways of responding to change, based on reference manual information.

- Neutral
- Innovator
- Resister

RHETORICALLY ASK if participants recognize their own typical response.

Slide 12

DISCUSS the reasons for different responses to change, based on reference manual information

- The method of implementation, whether planned or unplanned
- Personal factors
- Group factors
- Organizational factors

Planning for Change

5 minutes

Slide 13 & 14

DISCUSS the PDSA cycle and discuss its usefulness in planning for change (from reference manual information)

Slide 15

PRESENT and discuss the Managing Change graphic and the four steps to managing change (from reference manual information)

- Picture the future
- Assess the present
- Determine the gap
- Develop a plan

Slide 16

PRESENT the ways to implement change through the following approaches (from reference manual information)

- Participatory
- Educational/communication

- Power
- Negotiation/Compromise
- Consensus

Benefits of Effective Change Management

5 minutes

Slide 17

DISCUSS the benefits of effective change management. Benefits include

- Effective team behaviors are strengthened.
- Effective communication often results.
- Conflicts are reduced.
- Decision making can be improved.

Transition

REVIEW module objectives and link to the next module

Exercise 1: Cycle of Change Interventions

Instructions

1. Choose one example of a change your organization has experienced in the past year.

2. Identify which phase of the cycle of change your organization is in with respect to the above change:

- Equilibrium
- Ending old ways
- Transition
- Beginning new ways

3. Write your example on the appropriate page.

4. Select at least one intervention for managing the change to assure positive results.

Phase: Equilibrium	*Observations*
	Intellectual and emotional balance.

Your Example:

Interventions

❑   Be informed about the organization

What potential external or internal pressures may affect the stability of the normal situation?

Phase: Ending old ways	*Observations*
• Denial • Anger • Bargaining • Disengagement • Disenchantment • Disorientation	• Defensiveness, rationalizing, denial of reality, changes in physical health and emotional balance. • Resistance through blaming others, aggressive words and behaviors, visible resentment. • Wishful thinking to compromise the change out of existence. • Recalling pleasant past memories, unrealistic optimism about past. • Sabotage of the change.

Your Example:

Interventions

❑   Use reflective and active listening

❑   Be empathetic

❑   Assess the need for stress management training

❑   Use problem solving techniques

❑   Recognize legitimate feelings, acknowledge the loss

❑   Use conflict management

❑   Explain what is over and what is not

❑   Foresee and talk about who will lose what with the change

❑   Mark the ending symbolically, or with formal events

❑   Ensure accurate information is available about the change

❑   Other, please describe

Phase: Transition	*Observations*
• Chaos • Depression • Confusion	• Powerlessness, insecurity, weakening of defense mechanisms. • Self-pity, expressions of sorrow. • Emptiness, undirected energy. • Anxiety, ambiguity. • Increased competition, diminished trust, increased hostility. • Loss of productivity.

Your Example:

Interventions

❑ Talk about this in-between phase

❑ Delay or cluster further changes

❑ Update mission, create a vision, establish short range goals

❑ Communicate concern for people

❑ Be patient

❑ Allow quiet time for reflection

❑ Provide necessary information, in a timely fashion

❑ Rebuild social contacts

❑ Promote solidarity

❑ Other, please describe

Phase: New beginnings	*Observations*
Resignation	Passive acceptance of change, no enthusiasm.

Your Example:

Interventions

❑ Allow for gradual pace of acceptance, understand reluctance to accept the change

❑ Describe clearly the acceptable behaviors and attitudes

❑ Other, please describe

Phase: New beginnings	**Observations**
• Openness • Readiness • Reemergence	• Willingness to do assignments, interest in new events, feeling of empowerment. • Anxious about new direction and possibilities, old anxieties reactivated. • Excitement, celebration. • Unreasonable optimism – halo effect. • New identity.

Example

Interventions

❑ Patience in explaining desired change

❑ Direct and guide, directive management style which transitions to participative management style when the change has become established

❑ Redefine mutually understood goals

❑ Assess the need for knowledge and skill training,

❑ Redesign roles

❑ Provide role models for behavior and emotion

❑ Remove excuses that allow keeping old ways