

# NASDAE

November 20th 2024

# Managing Change

Brigitte Marshall





In what ways does this object  
represent change for you?

30 second round robin share with  
your table/zoom group



# Different faces of change....

1. **Requests or directives to make change that you have to follow**
2. **Unexpected and destabilizing change**
3. **Leadership moves you initiate that cause change for others**

**Unexpected and  
destabilizing  
change**

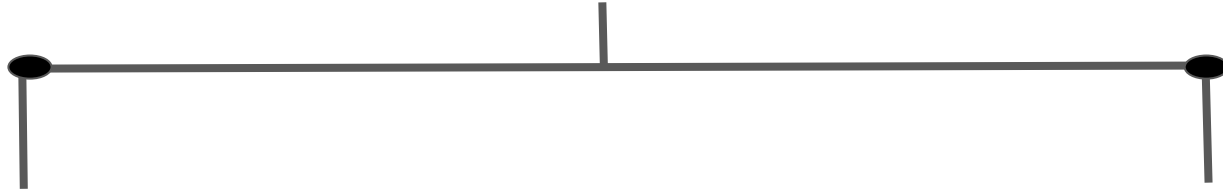
**Requests or  
directives to make  
change that you have  
to follow**

**Leadership moves  
you initiate that  
cause change for  
others**



# Agency

Ability of an individual or group to  
act with purpose



## Power

The *ability* to act  
with purpose



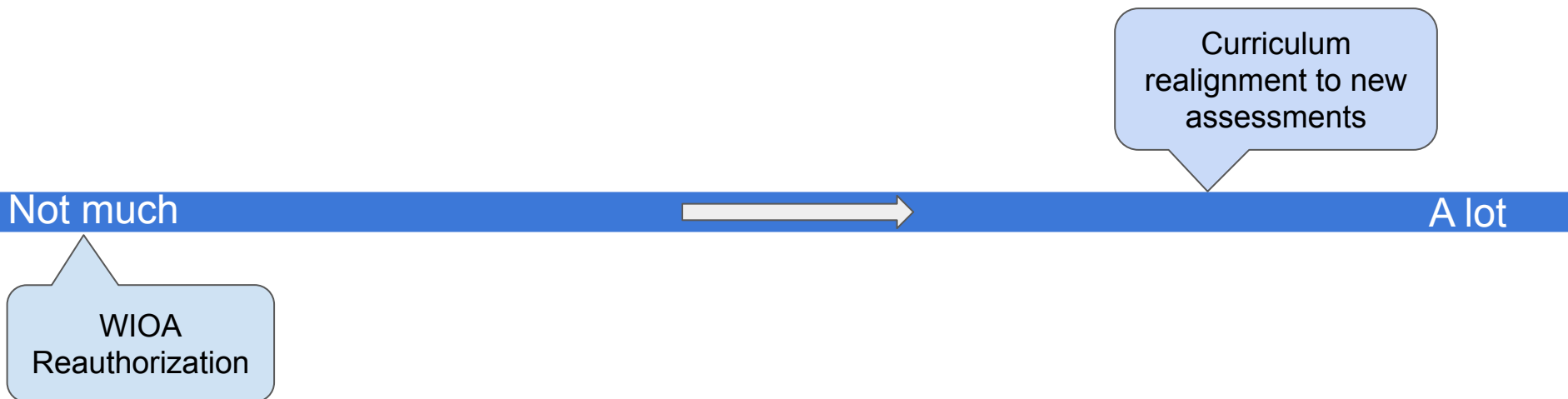
## Courage

The emotional  
resources to  
*choose* to act



# Agency Continuum

How much agency do you have, relative to the changes you are currently managing or anticipating?



# Relational



# IHI Psychology of Change Framework

to Advance and Sustain Improvement



AN IHI RESOURCE

55 State Street, 19th Floor, Boston, MA 02109 • [ihi.org](http://ihi.org)

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**Figure 1. IHI Psychology of Change Framework**



**NATIONAL BESTSELLER** over 500,000 copies sold

**William Bridges, PhD**  
Author of the best-selling TRANSITIONS  
with Susan Bridges

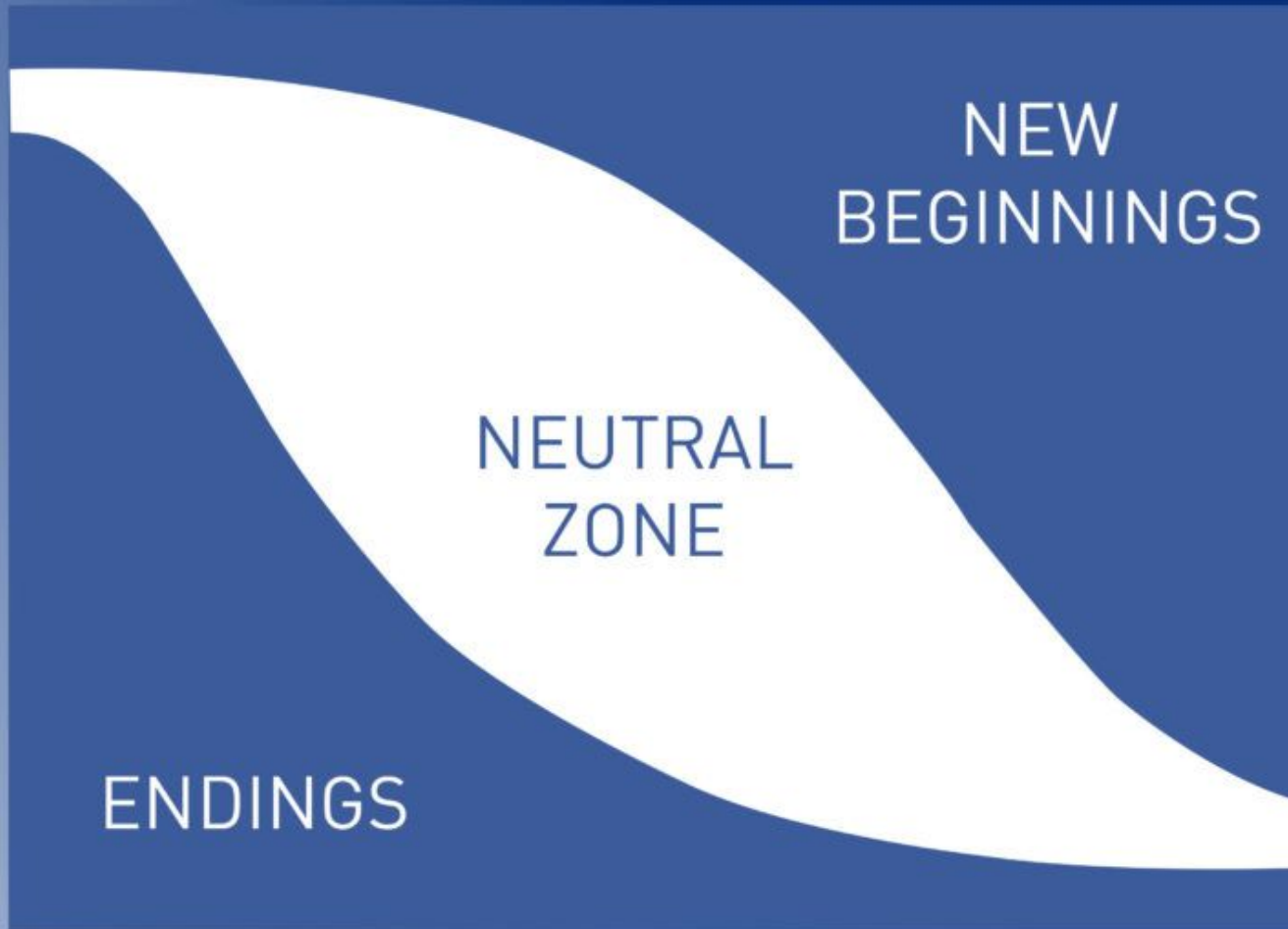
# MANAGING TRANSITIONS

3rd  
edition

**REVISED and UPDATED** for the  
NEW WORK ENVIRONMENT

LIFELONG BOOKS

**MAKING  
THE MOST  
OF CHANGE**



# It isn't the Changes That Do You In

Change is situational, transition is psychological.

“Changes of any sort finally succeed or fail on the basis of whether the people affected *do things differently.*”



# The Psychology of Change

## Managing Transitions

It's about getting people from where they are now, to where they have not been before, and supporting them to internalize and come to terms with details of the new situation.

It's about guiding others to make change in a way that leaves them feeling empowered and accomplished.



# The Psychological Change Journey



# Shoulder Partner Share

Which part of the psychological change journey is most challenging for you?

Through which part of the psychological change journey is it most difficult for you to support others?



New beginnings  
are often disguised as  
painful endings.

LAO TZU



## 3 Phases of Transition

- **ENDING - Defining and Departing**

Naming and framing, Letting go and  
grieving

- **NEUTRAL ZONE**

The change is not yet fully operational

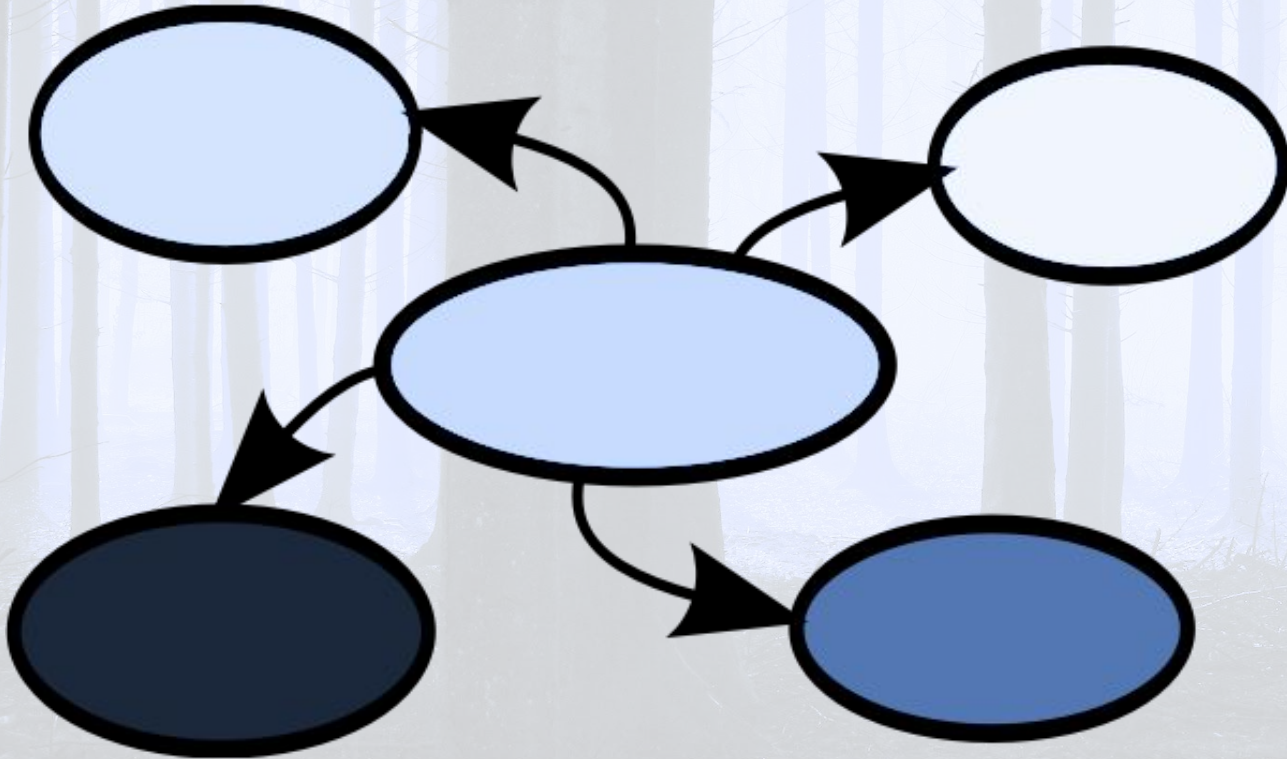
- **NEW BEGINNINGS**

The change begins to work

# ENDING - Defining

- Address fear of the unknown
- Describe the change in as much detail as you can
- What are the secondary changes that the change will cause?
- Describe exactly what will be different when the change is completed
- ***Get the elevator pitch down***

# Defining Mind Map



# Defining - Shoulder Partner Share

What is the change?

Why do you think folks are going to have a hard time with it?

What are the elements you think it will be important to include in your elevator pitch?

LET IT GO.

# Departing - Manage the Ending

- Define what's over and what isn't
- Give people information, and do it again and again
- Identify who is losing what
- Accept the reality and importance of the subjective losses
- Mark the endings
- Show how endings ensure the continuity of what really matters
- Support people to let go



## Managing the Ending Checklist

Adapted from *Managing Transitions - Making the Most of Change* - William and Susan Bridges

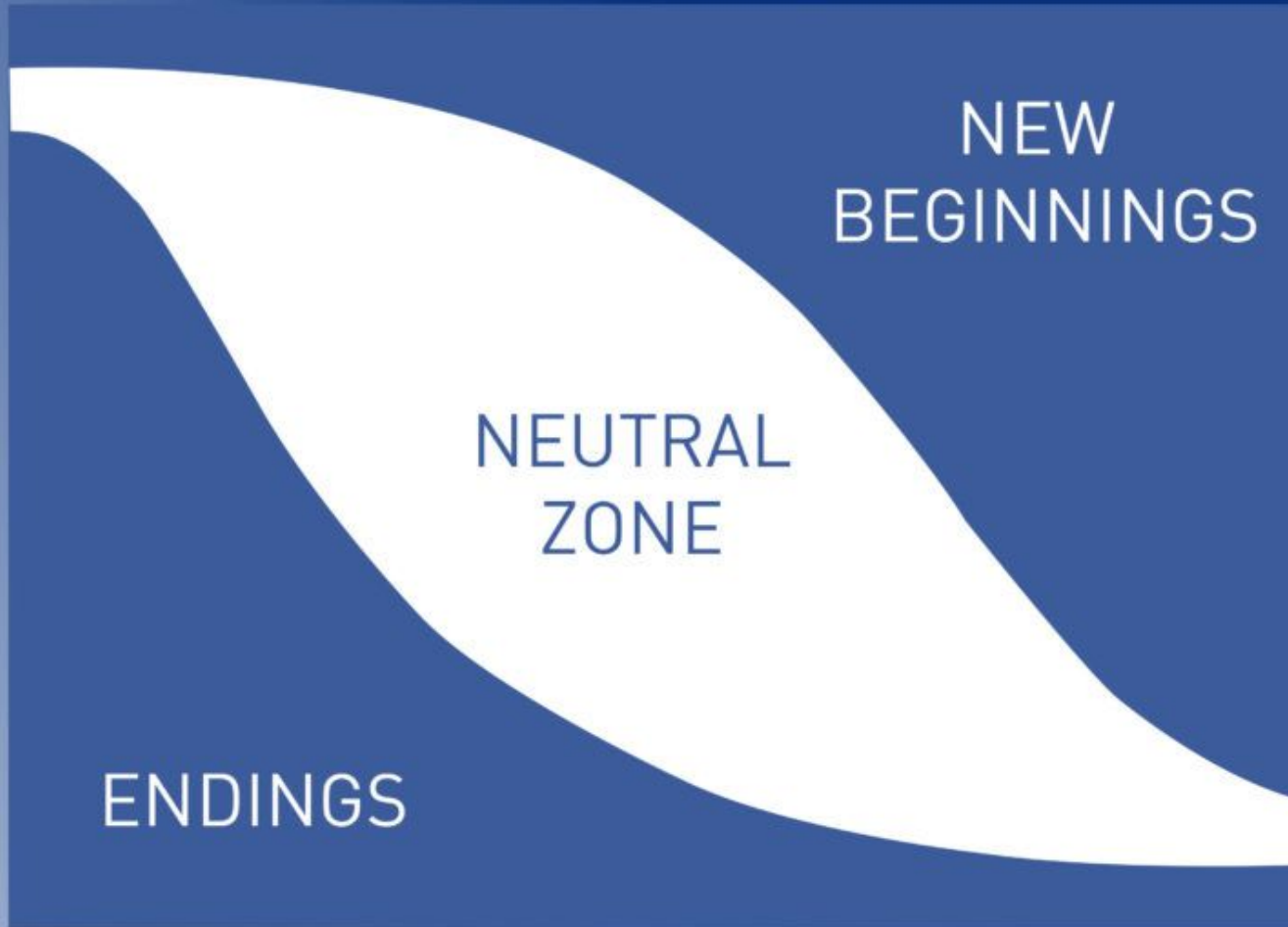
From Chapter 3: How to Get People to Let Go:

"The single biggest reason organizational changes fail is that no one has thought about endings or planned to manage their impact on people. Naturally concerned about the future, planners and implementers all too often forget that people have to let go of the present first. They forget that while the first task of **change management** is to understand the desired outcome and how to get there, the first task of transition management is to convince people to leave home."

A change I am currently managing:

*Consolidation of two regions and change in state staff assigned to monitor providers*

Self Assessment Question	Yes	No	Reflection
Have I studied the change carefully and identified who is likely to lose what?	✓		
Do I understand the subjective realities of these losses to the people who experience them, even when they seem to me to be overreacting?		X	<i>Under estimated the impact of the change in staff assignment on providers</i>
Have I acknowledged these losses with sympathy?			
Have I permitted people to grieve?			
Am I giving people accurate information and doing it again and again?			
Have I defined clearly what is over and what isn't?			
Have I found ways to mark the ending?			
Have I found ways to honor the past?			
Have I made it clear how the ending is necessary to protect the continuity of something that matters?			
Is the ending big enough to get the job done? (It doesn't work to leap a 20 foot chasm in two 10 foot jumps)			



# Drifting (Neutral Zone)

***“It’s not so much that we’re afraid of change or so in love with the old ways, but it’s that place in between that we fear.....It’s like being between trapezes. It’s Linus when his blanket is in the dryer. There’s nothing to hold on to.”***

Marilyn Ferguson, Futurist

# Drifting (Neutral Zone)

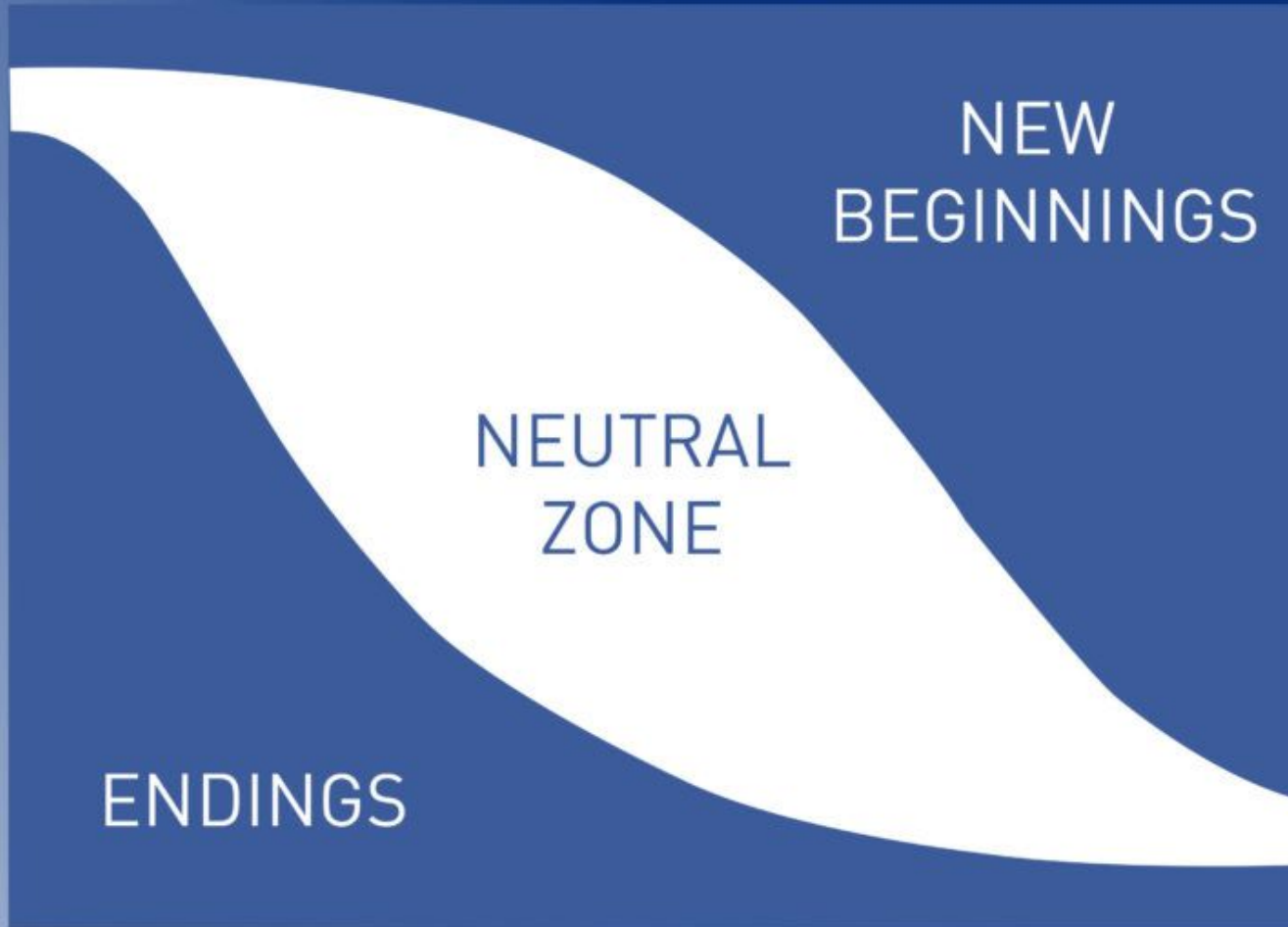
- Normalize the neutral zone
- Redefine the neutral zone
- Create temporary systems for drifting
- Use the neutral zone creatively



# How might you.....

- Make teams of four at your table and with neighboring tables
- Each team member chooses to reflect on a different Neutral Zone element from your handout
- Jot down some notes
- Take turns to share your ideas with your teammates





# A New Beginning

.....a new beginning takes place only after people have come through the wilderness and are ready to make a commitment to do things the new way..... Starts involve new situations. Beginnings involve new understandings, new values and new approaches.

Adapted from Managing Transitions - Making the Most of Change  
Chapter 5 - Launching a New Beginning

# Nurturing A New Beginning

- Timing - emergent rather than scheduled
- Clarify and communicate the purpose (again!)
- Translate ideas to pictures
- Make a plan for information, training, and support
  - Transition management plan v. change management plan
- Give everyone a part to play in the ***transition management process*** (contrasted with their role in the outcome of the change)

# New Beginnings Brainstorm

Think about a current or anticipated change you are managing.

## ***Changes to the definition of distance education***

Who are the interested parties who will be impacted by this change?	Amalia, Bill and Josefina from our office Downtown Learning Center (DLC) - (their program is 100% distance ed and very strong)
What role might each of them play in the transition management process?	Amalia will write the new Distance Ed guidelines - so during transition, listening campaign to engage field in their development - very relational and collaborative DLC - “buzz” creators - paint picture of new opps
How does their inclusion in the transition management process help impacted parties to internalize and come to terms with details of the new situation?	Leveraging Amalia’s relational skills and her inclination to be inclusive and collaborative will enlist providers in implementing the new guidelines DLC are respected and innovative Distance Ed providers - they can help other providers to see the beneficial opportunities that the new more expansive definition offers

# Share your New Beginnings Brainstorm

In triads - share a little of your brainstorm:

- What is the change you are managing or anticipating?
- Who did you name as interested parties?
- What role do you see for them in the ***transition management process***?
- How is this role helpful in getting people to where they have not been before?

# Reviewing the Big Ideas

- There are different kinds of change
  1. Requests or directives to make change that you have to follow
  2. Unexpected and destabilizing change
  3. Leadership moves you initiate that cause change for others
- Agency, or acting with purpose is the combination of ***ability*** and ***courage***
- There's a technical side of managing change, and there's a (often neglected) relational side - often referred to as the psychology of change, or managing ***transitions***

# Reviewing the Big Ideas

- Managing Transitions is about getting people from where they are now, to where they have not been before, and supporting them to internalize and come to terms with details of the new situation. It's about guiding others to make change in a way that leaves them feeling empowered and accomplished.
- There are three phases in managing transitions - all equally important
  - Ending - Defining and Departing
  - The Neutral Zone - Drifting in the wilderness
  - New Beginnings - Needs nurturing
- Paying attention to the Transition Management Process increases the level of agency we have in managing change

# Revisiting the Agency Continuum

As you now think about managing the transition process, as an integral part of managing change, would you make any adjustments to where you placed the changes you are currently managing on the agency continuum?

Thank You!

Brigitte Marshall

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