

## Leading Planned Change . . .



A look at your readiness for change, your congregation's readiness, and the basic steps to keep in mind

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Leading Planned Change - 1

Fresh Start

### Talking Points

The God of creation is constantly working; therefore change is a normal part of life. Life itself is a journey, with many endings and beginnings. Our task is to help the community listen to the Spirit and bring about the *change that God is calling forth*, leading them along the journey in ways that are respectful of where they are as well.

While the common wisdom is that clergy should not institute change for at least a year or two into a new call, the very fact that you are a new leader in the congregation is a change. And some changes are outside the congregation's control and require a response: a fire in the sanctuary, the sudden influx of an immigrant population, the need to deal with financial or other difficulties, etc.

## You and Change

Before beginning, reflect upon your own:

- Resourcefulness
- Adaptability
- Sense of optimism
- Sense of confidence
- Sense of adventure
- Tolerance for ambiguity
- Passion/drive

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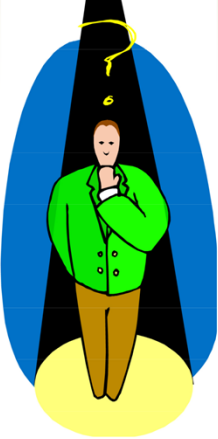
### Talking Points

Change always requires some risk, and congregations (like any living systems) will resist change to some extent even if the change is a longed-for one. As a leader, it helps if you are flexible, optimistic, balance a sense of adventure with a healthy regard for risk assessment, have confidence in your own ability, and can tolerate the necessary ambiguity of the “wilderness” time when the change is not fully integrated into the routine.

***Distribute the Change-Readiness Assessment found in the Resources Section.***

So before you dive into a change, take a moment to reflect on your own readiness for change. Respond to the 35 statements in the questionnaire I just handed out, then score your response using the format on the third page. Once you are done, take a look at the descriptive text that follows.

***Give participants time to complete, score, and read the piece on how to analyze their scores.***



- Is this an accurate picture of you? Why or why not?
- What challenges you in leading change?
- When have you successfully led a change effort? What did you do? What was the outcome?

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### Talking Points

Looking at your scores, do you agree or disagree? How accurately does it capture how you view your readiness for change? What challenges to your ability to lead a change do you see in your scores? When have you successfully led a change effort? How did your change readiness traits feed into that success? What did you do in that situation? What was the outcome?

***Have participants share their scores with a partner and respond to these questions (which may also be written on a flip chart) or facilitate a large group discussion using these questions and asking participants to share their successful experiences of leading change.***

## Looking at Congregational Readiness

- History of dealing with change
- Leadership commitment
- Breadth of support
- Existence of feedback system
- Number of other changes occurring



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### Talking Points

Before embarking on any change effort, it is also important to reflect on the culture of the congregation. Does it have a history of tolerating or even embracing change? Are leaders, elected and informal, committed to the proposed change? How broad – and deep – is support within the congregation? Is there a well-understood way for people to voice their concerns – and feel as though they have been heard? Is this the only change occurring or is it one of many?

## The Nature of the Proposed Change

**“Change often happens most easily if it can be shown to be embedded in long-held beliefs, values, traditions, rather than being just a total assault on everything everybody thought they were and wanted.”**

Drew Gilpin Faust

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### Talking Points

The next question to ask is to what extent the change you are proposing is in line with the congregation's history. How radical a departure would the change embody?

And to what extent is the proposed change aligned with a widely held vision of the congregation's future and its mission? Take a minute to reflect on your congregation's readiness for the proposed change.

***Distribute Handout 1 and ask participants to jot down their responses to the questions, then to discuss their congregation's readiness within their small groups.***

***Or facilitate a large group discussion about congregational readiness for change using the questions in the talking points.***

## Managed Change: *An Oxymoron?*

- If you control the decision to make the change, you **can** manage its implementation.
- **And**, if you want the change to be accepted, you can plan for getting people “on board.”

### Talking Points

It is true that some changes hit us unexpectedly and we cannot plan for them. But if you control the decision to make the change, its implementation can be planned. And if you want people to follow, you can also make a plan for bringing them along with you.

## Leading Change Requires Managing Both

- **The change itself** (“the act or instance of making or becoming different”) **and**
- **The transition** (“a passing ... from one place, state, condition, etc. to another”)

*Revised & Updated Illustrated Oxford Dictionary, New York, NY, DK Publishing, 1998*

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### Talking Points

It is important to understand that change, while understood as a normal and ongoing reality of life, still brings with it some anxiety. While an actual change is usually limited to a certain event in a certain time frame, the transition issues may be ongoing.

Change and transition are not the same. **Change is more the “outward and visible” event that happens.**

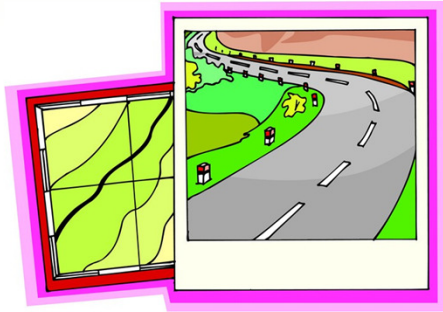
**Transition, however, is the process that happens** -- the emotional, psychological, mental and spiritual responses to change. These are invisible – we might say the “**inward and spiritual**” responses.

**Change is an event while transition is a process.**

Both need to be managed. Let’s look at each in turn.

***Note: If the participants have not had the session on Transition, you may want to ask them to think about a time – other than their recent change in ministry – when change occurred in their lives. It could be graduating from school, moving to a new city, getting married, having children, etc. Have them think about the actual event and then how long it took before their new situation felt “normal”. Ask if the distinction between change and transition makes sense to them.***

**If you don't know where you are going, any road will get you there!**



- **What are you leaving?**
- **Where are you going?**

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### **Talking Points**

With planned change, you can drive yourself (and others) crazy if you aren't clear on where you are going and don't have a map to get you there.

For example, the Old Testament Israelites had to discern what to take and what to leave behind when they fled Egypt for the Promised Land. What did they take and what did they leave behind? How did they determine this?

Thinking about your proposed change, what is your destination? Do you have a road map? What is being left behind? What is being carried forward? How was this determined?



**“It is a terrible thing to look over your  
shoulder when you are trying to lead –  
and find no one there.”**

Franklin Delano Roosevelt

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### **Talking Points**

Having a clear vision or goal and a good project plan to get you there is only part of the story – convincing people to follow and helping them through the transition from the old way to the new is the real challenge.

**How Change Threatens:**

- **Competence**
- **Coordination**
- **Commitment**

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### Talking Points

Why is change difficult for many people?

Michael Beer of Harvard identifies three ingredients for successful organizations, which can be applied to congregations as well:

competence (the confidence members have that they know how things are done and/or can do them)

coordination (collaboration within the congregation)

commitment (of members to the congregation)

When change occurs, all three are threatened. The way things used to be done may no longer apply and people feel uneasy or unsure. Traditional networks of communication and collaboration break down. And commitment to the congregation declines in the face of real or potential threats to members' sense of identity, community, or power and authority.

Addressing these emotional needs – the transition – is vital to the continued success, mission and sense of community of the congregation – and to successful implementation of the change itself.

## Individual Behavior



- The transition can take a long time...
- For behavior to become habit, it must follow an attitude change.



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### Talking Points

Restoring people's sense of competence, cooperation and ultimately commitment will require people learning new behaviors (and maybe new attitudes). Research supports the concept that if you change your behavior long enough, change in your attitude will follow. In other words, it is easier to act your way into a new way of being than to think your way into it: Act, and the behavior will follow. One of the foundational elements used in 12 Step Programs involves "acting as if" to change a behavior. You might hear someone say "fake it 'til you make it." This implies that a change in behavior over the course of time will likely lead to a change in attitude.

By changing the behaviors and inviting people to reflect on the experience of the new behavior, we can help manage the transition and insure the success of the change.

## Group Behavior

Congregations are made up of individuals, each with their own knowledge, attitudes and behavior patterns.



Gaining acceptance of change – getting everyone across the bridge – in a congregation is more complicated.

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### Talking Points

Congregations, of course, are made up of multiple individuals whose acceptance of the proposed change may vary. And this will affect the transition process.

A further complication is that, unlike in secular companies, leaders in the congregation -- lay or ordained -- often do not have the authority to **mandate** change, so church leaders have to pay even more attention to bringing people along.

As Christians, we struggle to respect both the tradition and the change; both the individual and the congregation; both the old and the new. How, while respecting both, can we lead a congregation through a change? Let's take a look at a case study involving change in a congregation.

***Distribute Handout 2, Moving the Baptismal Font, and ask participants to read it, noting what the rector did to help people change their behavior and attitude. Then facilitate a large group discussion on what people noticed.***

## Learn from Moses – Getting Started



- Get people on board
- Build on the best of the past
- Find partners and allies

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### Talking Points

Moses is a great example of a transition leader – take some tips from him.

The first step is to get agreement that change is warranted, to create a sense of urgency and develop a vision about what is possible/desirable. In advancing the case for change, show how it relates to the best of the past. And find allies who can help. Let's look at each of these in turn.

## Get People On Board



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### Talking Points

Remember that before the Israelites could go, Moses had to make the case for change. He had the help of the plagues, which probably impressed the Israelites as well as pharaoh! In addition, conditions for the Israelites needed to get considerably worse than they had been to get the people to move (remember, when the Israelites first came to Egypt at the time of Joseph life was good for them). For the Israelites, letting go of Egypt was hard in spite of their bondage. It took lots of persuasion not only of Pharaoh, but of the people themselves before they would follow Moses.

For congregations letting go of the old is difficult, too. Change of rectors, changes in liturgical style or music, change in the neighborhood that results in shifts in membership or mission, or even hoped-for growth can all elicit a feeling of loss. A sufficient number of people – a tipping point – need to buy into the need to let go of the familiar and begin the journey to the new in order for the community to follow.

## Focus on the Vision



**“You don’t lead by pointing and telling people where to go. You lead by going to that place and making a case.”**

Ken Kesey

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### Talking Points

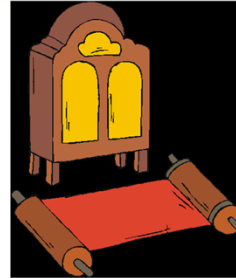
Part of getting people on board is being clear on the vision. For Moses the vision was of the “land flowing with milk and honey” – and with God’s guidance, he had a plan for getting there. He created the conditions under which his people could be set free, led them through the wilderness, and brought them a new covenant for living. But throughout the time in the wilderness, the Israelites complained constantly – and even longed for Egypt where they at least had a roof over their heads and food to eat. The Biblical story of the Exodus is full of verses where Moses reminds the people that they have escaped from slavery and are on their way to something new.

Change, even when it is moving from slavery to freedom, elicits conflict. Helping the community “stay the course” and remaining calm are the hallmarks of an effective change leader.

## Build on the Best of the Past

**“... part of moving through change effectively is making it seem seamless, or as seamless as possible, with what has gone on before ...”**

Drew Gilpin Faust



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### Talking Points


It is also important to show how the change flows naturally from and builds upon the past. While the Israelites were leaving much behind, there were also things that were important for them to carry with them. In changes in congregations, too, there are strengths that you want to build upon. The Israelites carried the ark of the tabernacle. They also brought Joseph’s bones with them to rebury in the Promised Land as a visible symbol of their history (Exodus 13:19). You need to be candid and clear about what is good about the past, and what may be missing now.

If we want to “manage change,” inviting people to identify their feelings and attitudes is part of a helpful approach. At the same time, you want to be clear what is NOT changing – the ministry and witness of your congregation – and the core values that make it what it is. Drew Faust went on to say the strategy is about “identifying continuities that can serve as bridges over the chasm of differences, building understanding and transparency about purpose and shared commitments, and using those to fuel the change.”


***Drew Faust, President of Harvard, is quoted in an article in the July-August 2007 issue of Harvard Magazine (“A Scholar in the House,” by John S. Rosenberg, p. 31).***



## Find Partners and Allies



- Positional authority
- Expertise
- Credibility
- Leadership ability

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### Talking Points

Moses didn't lead by himself – he had, first of all, his brother Aaron who spoke for him and who was the logistics person. There were others, too: the heads of the various tribes and houses who kept their families together and moving with the Israelites through the wilderness. There were scouts and military leaders who helped get the people safely through unfamiliar territory.

John Kotter, Harvard Business School professor and the author of Leading Change, talks about the importance of creating a “guiding coalition” of people who can make change happen. He identifies four kinds of people who must be part of that coalition, people with:

1. authority of office or position (members of the Vestry, wardens, key committee chairs),
2. the expertise or knowledge needed to implement the change strategy (e.g., people with fund-raising skills for a capital campaign and improvement),
3. a reputation as someone who can be trusted and taken seriously
4. proven leadership abilities (including those who are the informal leaders in the community – in fact, sometimes they are the most important of all in making change happen).

If you do not have people with leadership authority – both formal and informal – who are aligned with the vision and see the need for change, it is difficult if not impossible to successfully make the transition.

## More From Moses – Once You Are Underway



- Build structure
- Look for quick “wins”
- Visit the campfires
- “Pitch tent” when needed
- Reinforce the new

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### Talking Points

With a solid core of people behind you and a plan for implementation, the change is underway. And again Moses serves as a valuable example of what to do.

To lead the thousands of Israelites, Moses needed an organizational structure. He also needed someone to handle things when he retreated to the mountain top. Because the Israelites grew restless, he constantly needed to provide proof that he (and God!) knew what he was doing. He tempered his time on the mountaintop away from the people with his visits to the campfires and with God’s guidance, varied the pace of the journey, providing times when people could rest. He reinforced the new covenant with God by destroying the vestiges of idol worship.

## Build Structure

**“Management works in the system; leadership works on the system.”**

Stephen R. Covey

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### Talking Points

Moses was a visionary, the leader. But Aaron was the manager and took care of day-to-day operations. Trouble occurred when the two of them were far apart in terms of their principles – it was easy for Moses to be angry about the golden calf, but he had been on the mountain-top communing with God, while Aaron was having to deal with the panic of the people. Both Aaron and Moses were needed, and just as a leader during a change needs to keep things moving forward, someone has to care for what is happening now. Part of the work of leaders during times of change is to help make sure that those things that need tending get done. Doing so provides a sense of security, cohesion and purpose to that “wilderness time” – it allows for a sense of accomplishment and movement.

When Moses first led the people into the wilderness he heard every complaint and tried to handle every issue that arose. His father-in-law Jethro suggested that this was a recipe for burn-out. And Moses divided the people into units of 10, 50, 100 and 1000 and set up judges over them – in short, he delegated authority. Not only did this help prevent burn-out for him, it expanded the group of people committed to the journey of the Israelites and the vision of the future. Such arrangements can be temporary ones, to get you through the wilderness, or permanent – just be clear which.

In any time of change, you will lose some people – ones who cannot tolerate the ambiguity of the wilderness time, ones who do not buy into the vision of the future. But maintaining a sense of cohesion and purpose, being willing to allow experimentation, and gradually increasing the number of people committed to the change create social pressure for others to “stay the course” and be part of the future.

## Look for “Quick Wins”



- Plan for success
- Create miracles

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### Talking Points

Moses found water and manna in the wilderness, and flocks of quail came to soothe the hunger of the Israelites.

If your change effort is a strategic or long-term one, you need to plan for short-term gains – interim successes on the road to the final goal. And be sure to celebrate these accomplishments.

**Visit the Campfires**

Listen  
Communicate  
LISTEN  
COMMUNICATE



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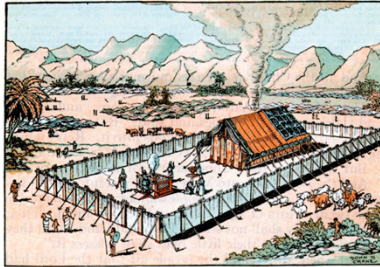
### Talking Points

Keep a pulse on the congregation. Moses wandered among the campfires at night, talking to people and listening to them. You need to put on your sandals and do the same.

Communication is a two-way street. On one hand you cannot communicate often enough during times of change – and you need to communicate in a variety of ways, keeping the vision always before people and being transparent about plans and how they are unfolding. If you don't know when something is going to happen, tell people when you will know.

But above all LISTEN – that is the most important component of communication. Find ways for people to share their hopes, their dreams, their fears and respond accordingly.

## Know When to Pitch Tent



**“At the command of the Lord the Israelites would set out, and at the command of the Lord they would camp.”**

Numbers 9:18

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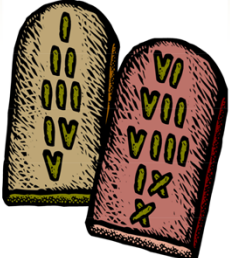
### Talking Points

Listening by the campfires will tell you how high the anxiety level is – and whether you need to slow down the pace or be clearer about the vision. In addition, make sure that any changes that are made are in line with – and necessary for – the accomplishment of the vision. Don’t introduce more anxiety into the system than is necessary.

You also need to balance the need to move on with the need to be clear about direction – the Israelites followed the pillar of fire by night and of cloud by day, but there were also times when they pitched their tents, waiting to discern where they were called. If the direction had always been clear, if there had been no obstacles in their paths the journey would not have taken 40 years. You may have times when things seem uncertain as well – remember to stop, pray and listen to discern God’s call.

## Reinforce the New

- Consistently model the new way of being
- Change behavior to change attitude
- Incorporate new leadership



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### Talking Points

Consistent modeling of the new way of being is required of leaders in times of change. Moses could not allow the Golden Calf to stand – and in his anger destroyed the first set of tablets containing the new commandments. But his point was made – the Israelites could not move forward without a new covenant with their Creator and a new way of being (i.e., not slaves, but free).

Behavior will change usually before attitudes. But if enough people begin behaving in a different way (e.g., accepting the new rector as truly their spiritual leader or supporting new outreach to a changing neighborhood), before long those behaviors become the “norm” and attitude/belief follows.

No one who had known Egypt could enter the Promised Land – hopefully you will all be around when the change you have begun is finally implemented, but the lesson is worth thinking about. Until people can let go of what your congregation was and be willing to embrace what it is called to become, they will never accept the change. You need to provide time for people to let go and room for experimentation and holy conversations to take place. And once the change occurs, new leadership may be required to keep the forward momentum. So it is important to be raising up new leaders to take over.

Any questions?

Then let's see how these principles apply to your situation.

***Distribute Handout 3 and give participants time to jot down some responses before engaging in discussion within their small groups or in a large group discussion.***