Leading Planned Change
Resource Section

"It is a terrible thing to look over your shoulder when you are trying to lead – and find no one there."
Franklin Delano Roosevelt

Purpose

To have participants reflect upon their readiness for change, as well as the readiness of their congregations, and to see how well they are doing in following the basic steps needed for change to be effectively implemented.

Theological Reflection

Change is a normal part of life – God's creation is always evolving. Life itself is a journey, and the Bible is full of journey stories. In each case people had to listen for God's call, leaving something behind and moving into God's vision of the future. In the story of the Exodus we trace one of the great journey stories of all times, and Moses is a prime example of a leader able to manage both the change and the journey required to bring it to fulfillment. And through it all blows the spirit of God, guiding the people in pillars of cloud and fire.

Special Instructions

If presenting this module to mixed clergy/lay groups you may want to structure your small group discussions around congregational teams to promote agreement among clergy and lay leaders about steps to be taken.

Related Modules

Exit and Entrance: Patterns, Emotions and the Wilderness
Leadership for Our Time
Planning for Effective Ministry
Transition

Bibliography

Bridges, William. Managing Transitions, 2nd Edition; Cambridge, MA: DaCapo Press, 2003 – describes model of transition vs. change, how transitions effect organizations, and what an effective leader in times of transition should do.

Heifetz, Ronald A. and Linsky, Marty. Leadership on the Line: Staying Alive through the Dangers of Leading. Boston, MA: Harvard Business Review Press, 2002 – conversational in tone, this book offers practical advice on strategy and caring for self when in a leadership position.

Kotter, John P. Leading Change. Boston, MA; Harvard Business School Press, 1996 – a professor from the Harvard Business School outlines an action plan for leading change.

_____ and Rathgeber, Holger. Our Iceberg is Melting: Changing and Succeeding Under Any Conditions. New York, NY, St. Martin's Press, 2005 – a fable about a group of penguins who need to change that can serve as a book for reflecting on one's own change situation; brief descriptions of Kotter's basic steps for managing change.

Rendle, Gilbert R. Leading Change in Congregations: Spiritual and Organizational Tools for Leaders. Herndon, VA, The Alban Institute, 1998 – provides several lenses for looking at change in congregations and a number of useful exercises to help leaders think through the ramifications of the change and how to plan; some of these exercises might be useful as substitutes or adjuncts to this module.

Other Resources

William Bridges uses the story of Moses to illustrate leadership in times of transition. The story can be downloaded free from Bridges website (www.wmbridges.com – click on "Articles" then "Getting Them Through the Wilderness").

The Bridges website also has a checklist of transition readiness which offers some useful questions to consider regarding an organization's readiness for change. While the language is tailored to private sector organizations, it could be easily adapted by substituting "congregation" for "organization," "parishioners" for "employees," and "elected leaders" and "informal leaders" for different levels of management (www.wmbridges.com – under" Articles," click on "Assessment Tools" – there is a printer-friendly version).

John Kotter's website – www.OurIcebergIsMelting – contains some brief videos of Kotter on the need to change, some questions to ask relative to each of the eight steps he outlines, and links to other resources.

General Outline of Session

1. Opening Prayer and Meditation (suggested reading: Exodus 13:17-22)

2. Check-in

3. Introduction and looking at self (PowerPoint 1-2; Talking Points; Change Readiness Test found in Resource Section)

4. Debrief scores (PowerPoint 3; Talking Points; sharing with partners or large group discussion)

5. Congregational readiness (PowerPoint 4-5; Talking Points; Handout 1)

6. Small group discussion of responses to Handout 1 OR large group discussion

7. Debrief in large group if applicable

8. Managing change (PowerPoint 6-12; Talking Points; Handout 2 – case study)

9. Large group discussion of what leader did in case study to manage change

10. Steps in leading change (PowerPoint 13-23; Talking Points)

11. Applying the steps to current situation (Handout 3)

12. Small group discussion of responses to Handout 3 OR large group discussion

13. Debrief in large group if applicable

14. Wrap-up and closing prayer

Change-Readiness Assessment

Circle the number beside each statement that reflects how accurately the statement describes you.

<u>**Change Readiness Scale:**</u> **1 = Not Like Me   6 = Exactly Like Me**

1. I prefer the familiar to the unknown 1 2 3 4 5 6

2. I rarely second-guess myself 1 2 3 4 5 6

3. I'm unlikely to change plans once they're set.......................................1 2 3 4 5 6

4. I can't wait for the day to get started 1 2 3 4 5 6

5. I believe in not getting your hopes too high..1 2 3 4 5 6

6. If something's broken, I try to find a way to fix it..................................1 2 3 4 5 6

7. I get impatient when there are no clear answers..................................1 2 3 4 5 6

8. I'm inclined to establish routines and stay with them............................1 2 3 4 5 6

9. I can make any situation work for me 1 2 3 4 5 6

10. When something important doesn't work out, it takes me time
    to adjust 1 2 3 4 5 6

11. I have a hard time relaxing and doing nothing 1 2 3 4 5 6

12. If something can go wrong, it usually does 1 2 3 4 5 6

13. When I get stuck I'm inclined to improvise solutions 1 2 3 4 5 6

14. I get frustrated when I can't get a grip on something............................1 2 3 4 5 6

15. I prefer work that is similar and in my comfort zone 1 2 3 4 5 6

16. I can handle anything that comes along 1 2 3 4 5 6

17. Once I've made up my mind, I don't easily change it 1 2 3 4 5 6

18. I push myself to the max...1 2 3 4 5 6

19. My tendency is to focus on what can go wrong 1 2 3 4 5 6

20. When people need solutions to problems, they call on me 1 2 3 4 5 6

21. When an issue is unclear, my impulse is to clarify it right away 1 2 3 4 5 6

22. It pays to stay with the tried and true 1 2 3 4 5 6

23. I focus on my strengths not my weaknesses 1 2 3 4 5 6

24. I find it hard to give on something even if it's not working out 1 2 3 4 5 6

25. I'm restless and full of energy 1 2 3 4 5 6

26. Things rarely work out the way you want them to 1 2 3 4 5 6

27. My strength is to find ways around obstacles 1 2 3 4 5 6

28. I can't stand to leave things unfinished 1 2 3 4 5 6

29. I prefer the main highway to the backroad 1 2 3 4 5 6

30. My faith in my abilities is unshakable...................................1 2 3 4 5 6

31. When in Rome, do as the Romans do...............................1 2 3 4 5 6

32. I'm a vigorous and passionate person 1 2 3 4 5 6

33. I'm more likely to see problems than opportunities 1 2 3 4 5 6

34. I look in unusual places to find solutions.............................1 2 3 4 5 6

35. I don't perform well when there are vague expectations and goals 1 2 3 4 5 6

The Seven Traits Of Change-Readiness

Add the scores for the questions in each category as indicated below. Note that in some cases the total must be subtracted from 35 to get the score for that trait.

Resourcefulness
6. _____
13. _____
20. _____
27. _____
34. _____

_____ Score

Adaptability
3. _____
10. _____
17. _____
24. _____
31. _____

_____ Total
_____ 35 – Total = Score

Optimism
5. _____
12. _____
19. _____
26. _____
33. _____

_____ Total
_____ 35 – Total = Score

Confidence
2. _____
9. _____
16. _____
23. _____
30. _____

_____ Score

Adventurousness
1. _____
8. _____
15. _____
22. _____
29. _____

_____ Total

_____ 35 – Total = Score

Tolerance for Ambiguity
7. _____
14. _____
21. _____
28. _____
35. _____

_____ Total

_____ 35 – Total = Score

Passion/Drive
4. _____
11. _____
18. _____
25. _____
32. _____

_____ Score

The Seven Traits Of Change-Readiness

Understanding Your Scores

Note: *Optimal range for all categories is between 22 and 26.*

Resourcefulness: Resourceful people are effective at taking the most of any situation and utilizing whatever resources are available to develop plans and contingencies. They see more than one way to achieve a goal, and they're able to look in less obvious places to find help. They have a real talent for creating new ways to solve old problems.

When people low in resourcefulness encounter obstacles, they get stuck, dig in their heels, and go back to the old way. Very high scorers (over 26) might overlook obvious solutions and create more work than is necessary.

Optimism: Is the glass half empty or half full? Optimism is highly correlated with ChangeReadiness, since the pessimist observes only problems and obstacles while the optimist recognizes opportunities and possibilities.

Optimists tend to be more enthusiastic and positive about change. Their positive outlook is, founded on an abiding faith in the future and the belief that things usually work out for the best. Very high optimism scorers (over 26) may lack critical-thinking skills.

Adventurousness: Two ingredients capture this adventurous spirit: the inclination to take risks and the desire to pursue the unknown, to walk the path less taken. Adventurous people love a challenge.

Since change always involves both risk and the unknown, they usually perform well during organizational shake-ups. They are the proactors, the employees who initiate and create change. But very high scores (over 26) may indicate a tendency toward recklessness.

Passion / Drive: Passion is the fuel that maximizes all the other traits. If you have passion, nothing appears impossible. If you don't, change is exhausting. Passion is the individual's level of personal dynamism. It shows up in a person's level of intensity and determination.

To make a new procedure work, to overcome the myriad of problems that any plan for change unwittingly produces, you've got to have passion and enthusiasm. Very high scorers (over 26), however, may mean you're bullheaded, obsessed, and heading for burnout.

Adaptability: Adaptability includes two elements: flexibility and resilience. Flexible people have goals and dreams like everyone else, but they're not overly invested in them. When something doesn't work out, they'll say, "Plan A doesn't work, let's go to Plan B." Resilience is the capacity to rebound from adversity quickly with a minimum of trauma. Failure or mistakes do not throw them. They don't dwell on them and get depressed but bounce back quickly and move on.

High scorers on this trait are not wedded to specific outcomes. If the situation changes, their expectations shift right along with it. Scoring too high (over 26) in this trait indicates a lack of commitment or stick-to-it-ness.

Confidence: If optimism is the view that a situation will work out, confidence is the belief in your own ability to handle it. There is situational confidence - "I know I can swim across this channel, learn this program, write this report" - and self-confidence - "I can handle whatever comes down the pike." Self-confidence is the kind of confidence the Change Readiness Scale measures.

High scorers are generally individuals with a strong sense of self-esteem. But more specifically, they believe they can make any situation work for them. Scorers above 26 may indicate a cocky, know-it-all attitude and lack of receptivity to feedback.

Tolerance for Ambiguity: The one certainty surrounding change is that it spawns uncertainty. No matter how carefully you plan it, there is always an element of indefiniteness or ambiguity.

Without a healthy tolerance for ambiguity, change is not only uncomfortable; it's downright scary. But too much tolerance can also get you in trouble. You may have difficulty finishing tasks and making decisions. If you scored over 26 you fall in this category.

Your Profile : You'll probably find you have higher scores on some traits and lower scores on others. This is typical of most profiles and indicates that some of your Change-Readiness traits are more developed than others.

The Change-Ready Scale is also useful in coaching teams to determine which players to pick and what roles to put them in. Adventurers are great starters, resourceful people are excellent problem solvers, optimists make good cheerleaders, and their input is especially useful when people feel discouraged.

Leading Planned Change
Handout 1

Answer the following questions with your proposed change in mind. In each case cite specific observations that support your response.

How has your congregation dealt with change in the past? Would you describe your congregation as cautious, adventuresome?

To what extent are the formal, elected leaders committed to the change? Who are the informal leaders and what is the extent of their commitment to the change?

What is the breadth and depth of support within the congregation as a whole?

What mechanisms exist for people to voice their concerns and do they generally feel as though they have been heard?

How widespread is the agreement on the vision and future of the congregation?

Is the proposed change both consistent with the congregation's history and aligned with its vision for the future? Why or why not?

How many other changes are facing the congregation at present?

Leading Planned Change
Handout 2

Moving the Baptismal Font

The baptismal font of a large church stood in the nave, tucked under the pulpit where it had been moved years before – no one could really remember why. When baptismal candidates, sponsors, godparents, and/or parents, and clergy stood around it, their heads bumped the bottom of the carved wooden saint that decorated the pulpit. In addition, when the party was gathered around the font no one except the people in the first few pews could see them.

At a meeting of the Worship and Liturgy Committee, the rector pointed out these drawbacks, and suggested that since the focus of liturgical reform had been to reestablish baptism as the primary sacrament of the church, it might be time to move the font into a more central and easily accessible location. The Committee agreed and began to brainstorm ways to help people become comfortable with the change. They identified another key committee that would need to be involved: Christian Formation. The rector agreed to speak to the chair of that committee. The rector also agreed to incorporate teaching about baptism as the primary sacrament into some up-coming sermons.

In the follow-on meeting with the Christian Formation Committee, the members themselves voiced some differences of opinion. Some had been brought up feeling that baptism was a private and personal matter and should be performed in a private setting. They and their families liked the intimacy of holding a small, private service outside of the main worship on Sunday mornings, and they had many happy memories of such occasions. Others, however, saw baptism as the entrance rite which brought people into full community with the entire "priesthood of believers." They enjoyed being able to respond "We will!" when asked if they would "Do all in their power to support this person in their life in Christ?" It made them feel part of a larger community. They all agreed, however, with the centrality of baptism and acknowledged that more could be done to prepare adults or, in the case of infants, the parents and godparents, for baptism.

Out of this discussion came two initiatives: an expanded baptismal preparation class for adults and a new Guild of the Christ Child headed by a lay woman with the assistance of one of the clergy and several other lay people, to pastor expecting families. Teams from the new Guild worked with the families during pregnancy and visited the new mother and child in the hospital, offering support throughout the time, holding the family and new infant in their prayers, and providing information on the sacrament of baptism and the role of the godparents. Much time and energy were put into this new ministry.

The rector, in the meantime, devoted several sermons to the theology of baptism, emphasizing the role of the community of all believers. She wrote articles for the parish newsletter talking about the rubrics in the Book of Common Prayer related to baptism, noting that baptism is "appropriately administered within the Eucharist at the chief service on a Sunday or other feast" (BCP, p. 298). She further noted that the Easter Vigil, Day of Pentecost, All Saints' Day (or the Sunday after), and the Feast of the Baptism of Our Lord were particularly suited for baptisms, as were times when the Bishop made his visitation. A policy, agreed to by the Worship and Liturgy Committee and openly supported by them, was developed that set these times as the regular dates for baptism. Those preparing for baptism – the adults completing the new course and the families ministered to by the Guild of the Christ Child – readily agreed to the new dates.

With several baptisms scheduled the time seemed right to move the font from underneath the raised pulpit to the crossing in the center aisle. The congregation experienced the baptismal font in its new, primary location. Each time someone approached the altar for communion, they passed by the font full of water - some without notice, some touching it as they passed, some dipping their fingers into the water that was kept in its bowl. Groups were asked to talk about how the change felt and to notice how much more room there was for baptismal parties to encircle the font and for everyone in the congregation to see the action of Holy Baptism as water was poured into the bowl. The sacrament of baptism became more visually participatory.

Just about the time most people had gotten comfortable with the font in its central location, there was a glitch. A wedding was being planned with a large bridal party. The mother of the bride was convinced that the font had to be moved to allow room for the bride's gown to pass the font. The mother initiated a parish-wide campaign to have the font moved back to its original place. She was encouraged to contact the rector, who responded that she would talk to the staff, the wardens, and God about her request.

The rector prayed and discussed the situation with staff and the wardens. She also raised the issue with the Altar Guild – and it was they who came up with a solution. They proposed decorating the font for the wedding, adding a ring of beautiful flowers to the top and a spray of additional flowers in front. The bride's mother was disappointed that the font would not be moved, but liked the sketch of the decorated font that the Altar Guild developed. The wedding occurred without a hitch and with plenty of room for the wedding gown – and the groom. The decorated font, along with the altar in the back, provided a beautiful visual for the formal wedding pictures.

And so the font remained where it had been moved.

Leading Planned Change
Handout 3

Answer the following questions with your proposed change in mind. In each case cite specific observations that support your response.

To what extent do people feel a sense of urgency that means they will be willing to change? What needs to be done to increase that sense of urgency?

What is the vision for the future after the change is implemented? How has that been communicated? What are your plans for keeping the focus?

What is staying the same? How does this change flow logically from the congregation's core values? How has this been communicated?

Who are your partners and allies in making this change? Who else do you need to involve?

How are the things that need to be tended getting done? What organizational structures – temporary or new – are in place to help sustain both the daily operations and the move toward the change?

If this is a long-term change, what intermediate steps are planned? What "quick successes" can be celebrated?

How are you finding out about what people think regarding the change? What plans do you have?

How much anxiety is in the system right now? Are there unnecessary additional changes occurring? What can you pull back from in order to give people time to rest?

What new behaviors need to be reinforced? What can you or other leaders do to reinforce them?