

# Paper 1

## A SAMPLE PROJECT STRUCTURE OR SCHEDULE

The following project schedule has been developed to assist you to plan the process of change. This paper supports discussion contained in step one in terms of 'Adopting a Model for Managing Change'. It is recommended that time is taken to select the first month of this schedule to enable the overall timetable to run in tandem with existing organizational planning cycles. For example, if plans are developed in sequence with the start of a financial year running from April to May, the first month of the schedule will be January.

Main Activities	Month
<p><b>Preparation Phase</b></p> <p>Preliminary decisions on the nature of the process – involvement of outside support, resources (time and money)</p> <p>Introduction to EDI – a general programme of awareness raising amongst staff, volunteers, young people and other stakeholders</p> <p>Full discussion of process at senior management and governing body level – agree role charter for change or project team; agree role and resourcing (especially time) of change agent; agree access to and support of senior management; appoint change agent; agree process for recruiting project team</p> <p>Discuss, amend and agree this process structure or project plan involving as many staff, volunteers, young people and other stakeholders as possible</p>	<p>One</p> <p>One &amp; Two</p> <p>By Month Three</p> <p>Three</p>
<p><b>Audit Phase</b></p> <p>Develop a thorough and widespread understanding of the audit process through the organisation</p> <p>Agree areas of enquiry, organisational aspects and methodology; draw up a plan for the carrying out of the audit; take account of any other relevant processes (eg Section 75 work) and integrate where possible</p> <p>Fieldwork – desktop analysis, data collection and other information-gathering, qualitative data from reflective workshops, focus groups etc, engagement with representative groups of equality categories</p> <p>Write up the findings – perhaps in both detailed and popular forms</p>	<p>Four &amp; Five</p> <p>By Month Six</p> <p>Months Six to Eleven</p> <p>Eleven</p>

Main Activities	Month
<p><b>Examination of Findings Phase</b></p> <p>Generate a list of questions and/or propositions to challenge the organisation</p> <p>Identify any external assistance required</p> <p>Decide on the method (s) of engaging the organisation in discussion/debate and instigate</p> <p>Write up the results of the challenge phase</p> <p>Evaluation/Reflection</p>	<p>Twelve</p> <p>Twelve</p> <p>Twelve &amp; Thirteen</p> <p>Fourteen</p> <p>Month Fourteen</p>
<p><b>Implementation Plan Phase</b></p> <p>Agree format of the plan.</p> <p>Examine the list of issues identified in the audit together with the results of the examination of the findings phase</p> <p>Agree the criteria for prioritising those issues that will be actioned in the first year of the plan and decide how the remaining issues will be dealt with</p> <p>Write up the plan and present it to the organisation</p> <p>Implement plan in the course of the coming planning/action cycle (including Evaluation/Reflection)</p>	<p>Fifteen</p> <p>Fifteen</p> <p>Fifteen</p> <p>Fifteen</p> <p>Sixteen to Eighteen</p>

# Paper 2

## HANDLING CHANGE IN ORGANISATIONS

When involved in change it is helpful to see it as a process and to understand where you are in the process. Much has been written about the management of change in organisations. It is advisable to be familiar with some of these the notions before attempting to take forward the process of placing the values of Equity, Diversity and Interdependence at the core of your organisation. However, to assist you the following summary of some of the ideas contained in the literature on the management of successful change has been developed.

In general it can be said that organisations change when individual behaviour changes. It is therefore important to be aware of the common characteristic individuals share (to a greater or lesser degree) when responding to change:

**Interest**, if it will take them where they want to go

**Engagement**, if they have a say in how the change happens

**Fear and Caution**, if they don't know where the change is taking them

**Surprise**, because often change has unintended consequences

**Uninterested**, because they are comfortable with the current situation

**Resistance**, because they feel they may lose out as a result of change

**Awareness of these responses and how to deal with them can make the difference between successful change**

There are six important points to remember about any form of change –

1. As is constantly echoed, change is inevitable
2. It's natural to be anxious about change
3. Communication and participation eases change for everyone
4. Individuals can do things to increase the likelihood of successful change
5. Reflection is central to success
6. Change is not an easy process

When you are planning for organisational change, it will be helpful to address the following questions:

### **Is change needed? If so, what type of change will be required?**

Some areas you may seek to change include:

- Attitudes
- Knowledge
- Procedures
- Culture
- Organisational Relationships
- Available Skills

### How much change will be required?

The amount of change you require will have an important bearing on the implementation strategy in terms of resources, time and approach. The change may be:

- Fundamental, large scale in strategy and culture
- Fine-tuning, modifying procedures and structure

**Whatever the amount of change you identify as necessary, successful fundamental change needs some characteristics of the organisation to stay the same. People need something familiar to hold on to when they are adapting to enormous or complex change.**

### Resistance to change

Resistance to change can occur at two levels – that which is out of concern – and is hesitant and may be flexible, and that which is out of disagreement – and is more likely to need detailed consideration of the issues. This said, it is important to remember that resistance is a natural part of the change process. This will help you develop methods to overcome it.

When it surfaces, it is important to understand why. Some issues to consider are:

- Will some individuals lose out as a result of this process?
- Do some individuals feel the present situation is satisfactory or do not feel change makes sense for the organisation?
- Historical factors - previous experience of a poorly handled change process (and linked to this must be acknowledgement of group behaviour patterns and norms).
- What is the degree of participation in the present process by those affected by the change?
- Are present communication techniques sufficient?
- Is there a shared belief that the change will benefit the organisation?
- Is there increasing uncertainty about how much freedom there is to change?
- Is the decision-making aspect of the process clear, relevant and adequate?
- Does inexperience of implementing change, and a reluctance to experiment exist within the organisation?
- What are the existing psychological and social commitments to current methods of providing services?
- Is the person or persons initiating the change sufficiently trusted across the organisation?

Some or all of these conditions may be present in the process of change. It is important to identify these conditions if they exist (and remember that they may exist in some parts of the organisation and not in others) and to address them. If you are responsible for a change programme it may well save time, resources and good will to use this checklist to examine your project, identify potential areas of difficulty and put remedial actions into your plan. It can also be beneficial to identify a mentor (perhaps from outside the organisation) who will review your processes and help you to identify likely weaknesses.

Human nature can also play a part in the change process. It is important to bear in mind that it is natural to have a:

- Fear of personal failure to master new skills
- Low tolerance for ambiguity
- Preference for judging rather than generating ideas
- Inability to accept and incorporate criticism
- Tendency to define the problem area too closely

## Continuous Change

Many change projects can be seen as a process of continuous improvement – or a continuous change process. The JEDI process is an example of this form of change. It is not a one-off shift. It is similar to a “life style” change for the organisation. It aims to put in place new methods of working that will remain to influence the organisation for as long as it exists. In this respect the JEDI change process can be seen as one that puts in place the mechanisms to identify and implement the constant change necessary to ensure that the organisation is always joined in equity, diversity and interdependence with the ever changing society in which it operates.

## General Conditions for Successful Change in Organisations

1. **Identify the reason for the change.** Discuss, record and disseminate the benefits to be accrued from the change. This forms the basis of the case for the change. It will probably be required time and again in the discussions about the value of the change and particularly when the process becomes difficult. It will need to be convincing enough to sway the opponents of the proposed development.
2. **Have a clear vision of what has to be achieved.** It is rarely possible to have a completely clear picture of what has to be achieved. It is however important to have as much detail as you can, and to be clear about the different stages of the process.
3. **Encourage participation in creating changes.** The more involvement there is in a change process, the more ownership there will be of the outcomes.
4. **Identify practical steps.** Breaking the change down into manageable steps will make it easier to manage. It will also help in the identification of milestones of achievement that will be important in the maintenance of morale, particularly if the change process is a long one.
5. **Take calculated risks.** This is a very important part of the management of change. It is obvious but not always understood that change will mean doing some things in a different way. In the early days this involves a degree of risk taking and piloting initiatives that have an element of “try it and see” about them. The risks need to be calculated particularly at the start of the change process, as it is important to build confidence in the likely success of the proposed change.
6. **Question assumptions.** This is a necessary underpinning aspect of all change. Why are things done in the way they are? Some times the reasons are no longer valid. Sometimes they might always have been questionable. In some cases a new approach will be better

or, at least, no worse than the old methods in terms of overall outcome and some of the other consequences may be very beneficial (e.g. the degree of inclusion of diverse groups in reaching the conclusion).

7. **Be flexible about means but constant about ends.** If you include people in the process of change (and it is essential to do so if it is to be successful), then it follows that you will need to be flexible about the means by which change can be achieved. Everyone will have an idea of the best way to achieve the desired outcome and ownership of the conclusion will be most likely to occur if these ideas are taken on board and the best of them implemented.
8. **Develop clear explanations and understandings.** This is important all the way through the process of change. If all, or part, of the organisation fails to understand what is happening the overall process may be jeopardised. It is often the case that those with responsibility for overseeing change develop explanations and understandings in the early stages of a process but then fail to ensure that these keep pace with the various stages of the change. The explanations need to be discussed, reflected on, and understood. It is recommended that an open dialogue be established and maintained throughout the process and that it involves all levels of the organisation.
9. **Assimilate earlier changes (take stock).** It is recommended that time be built into the process of change to allow for reflection, review and taking stock of what has been achieved so far. It should also allow for amendment to the process in the light of the outcome of this reflection. These occasions also help people to come to terms with change in a time frame that gives some degree of control over the impact.
10. **Train the organisation in planning for change.** Being aware of the issues involved in change, irrespective of the theme of the change, is important to the ensuring success because it allows those involved to be conscious of what is going on and to develop strategies to cope with resistance.