

LEADING CHANGE

Know What to Expect in Times of Transition

BY MAUREEN GALLAGHER and JOHN REID, M.Div.

One thing that's certain about the near future of Catholic health care: uncertainty, for the foreseeable future, will permeate the scene. Significant changes in health care — changes underway for at least a decade and expected to continue for at least another decade, including the implications of national health care reform — assure that transition will be an ongoing state. While leaders will have many important decisions on their agendas, effective management will require helping both staff and patients to negotiate the transitions they will surely face.

Although experts offering counsel to leaders of organizations in transition abound, one we have found to be particularly helpful is William Bridges, author of *Managing Transitions: Making the Most of Change* (Da Capo Lifelong Books). Bridges notes that change is part of life, and rapid change is inherent in all organizations in the 21st century. But he makes an important distinction: Transitions are different from changes. Changes often are connected with events. For example, a hospital is bought by or merges with another hospital or becomes part of a larger system. It gets a new chief executive, builds a new surgical wing, adds a palliative care department, changes the ways in which care is delivered. A Public Juridic Person is formed and sponsorship shifts; there is internal reorganization, a reduction in force. Staff cuts are made, schedules are radically changed, offices are moved, government reimbursement rules change, new technology is introduced, new regulations or

priorities affect long-term care.

Transitions accompany changes, but they call for more than functional shifts. They require psychological reorientations. **Figure 1** illustrates not only Bridges' thinking about endings, times of grief and loss that throw us into a neutral zone, a "wilderness" from which we gradually emerge into a time of new beginnings, but also the work of the late J. Gordon Myers. Bridges labels three phases in dealing with change the transitional elements: the endings, the neutral zone and the new begin-

The more radical the change, the more vulnerable people are to paralyzing stress.

nings. Myers describes five areas that need attention in order to move from what is dying to what is struggling to be born. Myers dealt with corporate transitions in terms of remembering the

past; articulating the present; grieving and letting go; knowing what is remaining the same or deepening; as well as engaging hopes and dreams for the future.

From a faith perspective, we are talking about the Paschal mystery, the cycle of death and resurrection at play in Catholic health care.

COPING WITH LOSS

Endings inevitably accompany change, whether on a large or a small scale. They become stressful when comfort levels are lost, when confidence is shaken, when co-workers leave, when people see no significant reason for the change and become confused, when a person's or institution's very identity is changed or questioned. The more radical the change, the more vulnerable people are to paralyzing stress.

On the change spectrum, people are wired differently to deal with change. Some are explorers looking for challenging transformations. "Bring it on" is their motto. At the other end of the spectrum are the settlers — "if it is not broke, don't fix it" — who struggle with change in a big way. Most of us are

Figure 1
TRANSITION PROCESS



somewhere in between: We can cope effectively with organizational change, even welcome it, especially if we are involved at some level in creating and implementing the new beginnings that emerge from times of transition.

Two images from Scripture help us understand the wilderness zone, that in-between time when something of significance has ended and new beginnings are waiting to be born. One is the metaphor of Moses in the desert. The other is the story of the disciples on the road to Emmaus.

Moses journeyed in the desert for many years. The old days of oppression had ended, but the Promised Land was still far off. Much that was familiar, even if unwelcome, was gone, leaving little more than uncertainty in its place. While wandering in the desert, people were in disarray. The culture was changing; new rules were emerging; the old survival methods no longer worked. Trial and error was the order of the days. As the Israelites looked back, life in Egypt didn't seem to be all that bad. At least they could count on having food and drink. The Israelites were not handling the unpredictability of the wilderness very well, but there was no turning back.

The story of the disciples on the road to Emmaus (Luke 24: 13-35) is similarly a story about transition. The disciples were deeply disillusioned. They had been secure in their belief that Jesus was the real Messiah. They had bonded with him, come to understand his expectations, put their hopes in him and now he was gone. A fellow traveler joined them on the road, and they expressed their troubles and pain to him. They

were hurting. The stranger listened to their story, then shared his perspectives. After offering him hospitality, they recognized in the breaking of the bread that the stranger was Jesus. Their openness in their time of stress led them to new understandings and awakened energy.

These two Scripture stories help connect us to our past, to our legacy of experiencing periods in the wilderness, of confusion, questioning and disappointment. They give us, as well, models of openness, people who discovered new life, new ways of thinking, new possibilities as they traveled with others through the wilderness.

SURVIVING WILDERNESS

Our own experience as consultants walking through the wilderness in times of transition with health care leaders and with educational, religious or parish communities supports the wisdom of honoring Bridges' three stages and Myers' five actions. They are helpful in those in-between times, those times of struggling to let go of the past and give birth to the new.

It should be noted that the three stages and five actions often overlap. The order is less important than recognizing the stages and addressing needs.

Remembering the past is critical to making it successfully through the wilderness. In Catholic health care, it's important to recall how the Catholic sisters directed health care ministry, headed departments, served as top leaders, yet got to know patients personally and rejoiced as each new baby was born. Their dedication was the basis for quality care and patient satisfaction. Remembering the bygone practice of doctors making house calls is another way of calling on the dedication of the past — a dedication

If we were to say what is most essential in successful transitions, we would say communication, communication, communication.

that is needed today, even if house calls are not. Recalling the past does not mean idealizing or romanticizing past practices or traditions. These need to be remembered for their challenges as well as for the values they represented. In some cases, the past needs to be remembered so that it will not be repeated. This is especially

true if people were treated poorly, without dignity or respect or if they were oppressed and dealt with unjustly.

MANAGING CHANGE

If we were to say what is most essential in successful transitions, we would say communication, communication, communication — communication that involves listening with the head and heart and sharing with the head and heart. Shar-

Articulating the realities of the present, sharing its strengths and struggles with others, empowers people to begin to take steps out of the wilderness.

ing can be with speech, the written word, ritual, story and gesture. Inviting staff, former patients and, if appropriate, current people served by the institution to remember the past in concrete ways, such as bulletin boards in public or staff-only areas where people can share memories of the institution as they knew it, can be helpful in leading people into the future. Staff meetings can begin with sharing of memories, stories, pictures, good times and bad. Memories help make the past present and link it to the future. They put the transition in a certain perspective that can release both sadness and ultimately positive energy. If the transition is related to a major change, a whole book could be created as part of shared history. Employee blogs are often an easy way to get people to share their hopes and dreams, simply by asking them what positive things they think might come out of the current transition. They can build upon each other's ideas.

Articulating the realities of the present empowers people to begin to take steps out of the wilderness. Even in the midst of chaos, there is strength. Seeing what those strengths are and naming them give groups power to act upon them.

Many of the struggles in the wilderness zone deal with loss of meaning. Author and leadership expert Margaret Wheatley notes, "All change results from a change of meaning. Change occurs only when we let go of our certainty, our current views, and develop a new understanding of what's going on." During the transition time, it is important to encourage conversation about strengths

and struggles. This helps individuals and groups articulate meaning, to focus on the heart of the matter rather than on trivialities. Dialogue in the wilderness zone mobilizes the wanderers and helps them feel connected.

Probably one of the greatest and most effective things supervisors and senior leaders can do to help people deal with the organization's strengths and struggles as well as their own, is to be with them and listen to them and provide regular informational updates. Leaders need to invite the sharing of both positive and negative feelings and concerns. Being as transparent as possible during difficult transitions builds trust, and trust builds stability and lessens fear and anxiety.

LEADERS MUST LISTEN

The temptation for some leaders during times of change and transition is to hide out. They don't want to hear griping and complaining. However, by making people and their concerns a top priority, by listening attentively, by showing care even when decisions cannot be reversed, leaders can help people travel through the wilderness zone with less pain and sometimes less hurt.

This means being available for staff meetings, sitting in the cafeteria with different groups and inviting conversation about their concerns. It may mean working with the human resource department to set up times when individuals or groups can gather to discuss various aspects of the transition journey. It is important to remember to make support services and opportunities for conversation available to people no matter what shift they work.

Just as the disciples on the road to Emmaus did not get the meaning of all that had happened, many people going through transitions feel so disoriented that they, too, find it difficult to find any meaning in the current situation. If the transition involves shifting of personnel or downsizing, it is important relationships be honored, even if these associations will not continue in the same way. Shifts in staffing are very stressful for both those leaving a department or institution and those remaining. Beyond severance packages the institution may offer, the appropriate use of stories, symbols, gifts and gratitude will reflect the organization's respect for all who have contributed to its mission. Naming and grieving losses and hurts empower people to let them go.

CONNECTING PAST TO PRESENT

Using artifacts from the past, sharing “relics” of former practices, distributing memorabilia are all ways to help people deal with what has been and acknowledge their grieving. In one case, where a 100-year-old courtyard and a small hospital chapel were being destroyed to make space for a new medical diagnostic unit, the employees were invited to have a brick or take an iris bulb as a memento of what had been. In other cases, windows or other artifacts from chapels or atriums of old buildings have been effectively incorporated into the new edifice to remind people of continuity with the past.

Connecting with stories from our traditions may also help to bridge the gap. Using storytelling, prayer and reflection interspersed with

shared meals allow people to contribute to meaning and connect with each other during their time in the wilderness. Such events help diminish isolation and encourage bonding.

The chaos of the wilderness often presents opportunities to regroup and come to a new or renewed realization of the meaning and purpose of a job or a relationship, or of life itself. It is a time to understand anew what is changing and what is not. Transitions present opportunities to grow and be nurtured by the strengths, starkness and beauty of the unknown. It is a chance to question basic premises and come to new realizations. New cultures are created in the wilderness zone; new relationships are formed; new insights into faith are made.

For example, the Ten Commandments came

MANAGING TRANSITIONS

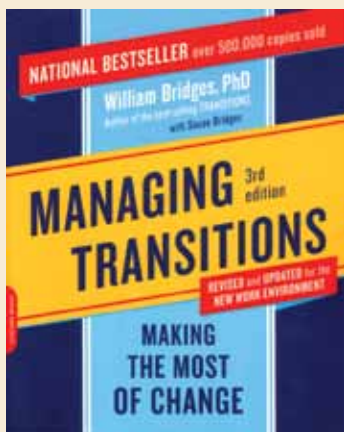
Change is an ever-present fact of life in most organizations today. Leaders and managers should be aware that transitions are marked by three overlapping stages: an ending, a neutral zone and a new beginning. Here, based on William Bridges' book *Managing Transitions: Making the Most of Change* (Da Capo Lifelong Books, \$16.95) are some characteristics of these stages, followed by some strategies for leading people through them.

TRANSITION STAGES

Ending: A time (which may be imposed on people) of letting go of old ways and old identities and grieving losses

Neutral zone: A confusing, ambiguous, unsettled but also creative, in-between time when new alignments and patterns are developing (and may be difficult to articulate)

New beginning: A time for assuming new identities with a renewed sense of purpose and energy for moving forward



ENDINGS: HOW TO HELP PEOPLE COPE

- Identify and describe what will and won't change and the losses involved. Allow time for grieving, which may involve the following stages: anger, bargaining, anxiety, disorientation, sadness and depression
- Keep people fully (and repetitively) informed
- Look for ways to compensate people for their losses
- Honor the past

LEADING IN THE NEUTRAL ZONE

- Provide structure and security to the degree possible
- Be sure policies and procedures are adequate for such a confusing time
- Create temporary roles as needed
- Strive to make everyone a winner, to enhance as much as possible the roles of all involved
- Set short-range goals and keep expectations reasonable
- Encourage experimentation and innovation
- Allow the new beginning to emerge; resist pushing for closure

LAUNCHING THE NEW BEGINNINGS

- Encourage moving forward, but expect anxiety and ambivalence
- Explain the purpose behind the outcome
- Be sure the purpose is concrete, attainable and clear
- Create a plan
- Give everyone a role
- Be consistent
- Provide for quick successes
- Reward people; celebrate successes

out of a culture in which new associations were made and new rules were needed — yet Moses brought the bones of Joseph with him into the wilderness to help connect the people with the past. (Exodus 13:19)

Wandering in the wilderness zone often provides opportunities for reflection and contemplation. It is a time to see the interconnections between the Exodus story, or the life, death and resurrection of Jesus Christ, and our own suffering and loss. If we can connect to the bigger picture of the Paschal mystery of Christ, we will be less inclined to live in pity city, less vulnerable to cynicism and more energized in time to contribute to a hope-filled future.

Practically speaking it is helpful to give staffs and the people affected by a specific transition an opportunity to articulate what is changing and what is not. Often it is the basics that remain unchanged: the opportunity to use one's skills and knowledge to serve those in need.

WELCOMING THE NEW

Discovering hopes and dreams for the future is the last of Myers' areas, which if attended to, helps people emerge from the wilderness zone. When people are swirling in a morass of change and transition, it is sometimes hard for them to envision a positive future. Given time, patience and invitations to create something new, those experiencing transitions will begin to get energy to help build something new. At first it may just seem to be a glimmer of light, then it will grow to be a beacon of hope and new life.

People who love change often start here, with imagining the future. They instinctively dream of what could be and are often not sympathetic to the "settlers" among us who would rather not budge. Problems arise when a person in leadership focuses only on the dreams and hopes for the future, giving short shrift to the realities of the wilderness zone. Effective leaders provide time and resources to travel the wilderness zone at a reasonable pace. If this is not attended to, people will spend more energy trying to return to the past, and the organization could dissolve, or be taken over by a more "profitable" group, or gradually diminish.

Transitions that are handled well, transitions in which leaders engage all involved and allow time for new beginnings to emerge from within, can produce amazing results:

■ Innovation can blossom in the wilderness zone. The creative tension between the past and emerging potential produces fertile ground for new ideas.

■ The wilderness zone presents opportunities for fruitful conversation. People need to worry and dream together, to reject fragmentation. In times of turmoil, people need to reclaim time to be together.

■ The skills and abilities to successfully navigate the wilderness zone include sharing memories, storytelling and ritualizing; listening to the heart of the other; being attentive to facts and realities; reflecting on the meaning and purpose of the health care endeavor.

The essence of Catholic health care ministry is found in its care for individuals and families who are ill and in need of healing. It is based on the healing ministry of Jesus. In that ministry, Jesus connected his followers to the past, helped them see, name and deal with the strengths and struggles of the present, allowed them to grieve, helped them to find meaning in the presence of God who was always present and gave them hope for the future. Today, Catholic health care has an enormous opportunity to be a leader in the transition from the wilderness zone to the promised land of a more just and equitable system of continuing the healing ministry of Jesus.

MAUREEN GALLAGHER and **JOHN REID** are search, planning and leadership development consultants with The Reid Group, Seattle.

FOR FURTHER READING:

Transitions: Making Sense of Life's Changes, by William Bridges (Revised 25th anniversary edition, Da Capo Press, 2004).

Managing Transitions: Making the Most of Change, by William Bridges with Susan Bridges (Da Capo Lifelong Books, 2009).

People & Change: Planning for Action, by J. Gordon Myers (Oriel, Inc., 1997).

The Art of Change: Faith, Vision, and Prophetic Planning, by John Reid and Maureen Gallagher (Liguori Publications, 2009).

JOURNAL OF THE CATHOLIC HEALTH ASSOCIATION OF THE UNITED STATES

www.chausa.org

HEALTH PROGRESS®

Reprinted from *Health Progress*, March-April 2011
Copyright © 2011 by The Catholic Health Association of the United States
