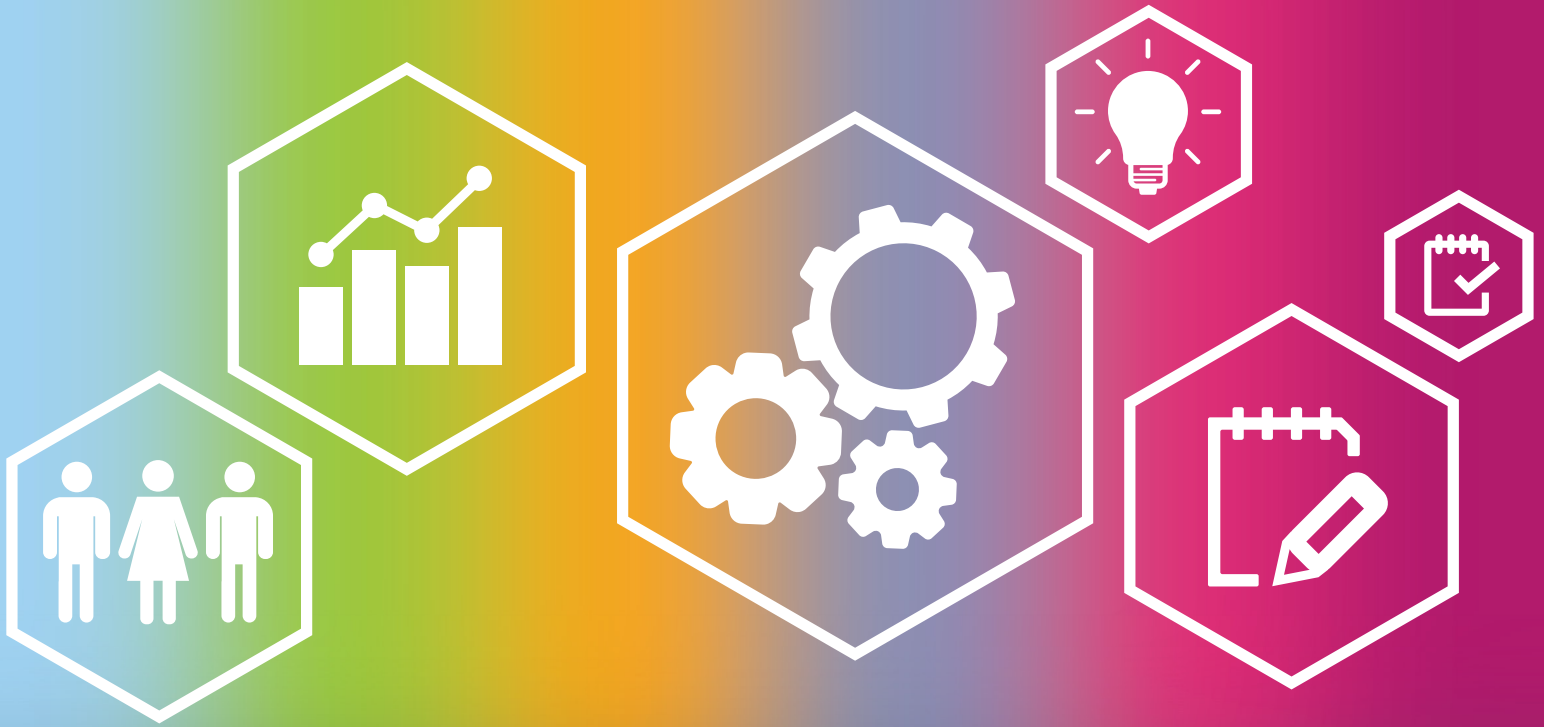


RE-IMAGINING CHANGE



A WORKBOOK FOR CREATING, EMBRACING, AND
HARNESSING ORGANIZATIONAL CHANGE





Acknowledgment

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A Note on The Contents

ODEN is pleased to offer the following resource to support your journey through the change management process. This workbook was prepared using information from leaders in the field of change management, current research, case studies, and observations of promising practices in the developmental services sector. We believe it is a strong and practical resource to support the change management process. However, use of this workbook is not to be construed as a guarantee of specific outcomes. The change management process is, ultimately, the responsibility of the user of this workbook.

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Defining the Workbook: The Ontario Disability Employment Network (ODEN), with support from the Ministry of Children, Community, and Social Services (MCCSS), is pleased to offer *Re-Imagining Change: A Workbook for Creating, Embracing, and Harnessing Organizational Change*. This workbook has been designed to guide developmental services (DS) organizations as they move through various change processes.

Re-Imagining Change is a resource to help organizations work through and with change. The only certain thing about change is that it is constant. For an organization to run successfully, its leaders and staff must know how to navigate change meaningfully.

In 2018, ODEN published *Roadmap to Inclusion: A Guide to Change Management for Service Organizations*.¹ At the time, many DS organizations were undergoing significant transformation in services in response to the Ministry's directive to end segregated employment programs (Sheltered Workshops), and to focus on achieving community-based employment for people who have a disability. Knowing how challenging this would be, ODEN developed a change management resource to support member organizations in that process.

Now, however, DS organizations are confronting new and different changes. Whatever precisely those changes may be, this workbook is intended to support organizations through their change processes. Though no two change journeys are exactly alike, change in the DS sector seems to fall within one of three categories: change that is desired; change that is required; and change that is compelled. This workbook has been designed to prepare organizations to meaningfully and capably engage with the change process, no matter what type of change they are dealing with.

Vision for the Workbook: Thought leaders in change management have noted, "In the face of growing demand for evidence-based practice and policy that translates research into practice, human-services organizations encounter a number of obstacles that compromise efficient and effective change."² For most human-service organizations, the nature of work is often responsive to "immediate needs", leaving organizations with insufficient time to prepare for future organizational needs and prepare for change. That's why ODEN has done the research, and taken the guesswork out of incorporating effective, evidence-based change management into your practice.

Inspiration for this resource arose when ODEN was researching the program plans and outcomes from the MCCSS *Employment and Modernization Fund* (EMF) projects. It was through this process that ODEN began to understand what it took for an organization to successfully carry out change initiatives. During this research phase, ODEN also identified areas in which organizations needed support to meaningfully engage with change processes. An opportunity was identified to use these learnings to inform stakeholders about promising practices in change management.

In addition to reviewing several case studies on change management through the EMF, ODEN also carried out academic research on change and social services. Although there are similarities among most change cycles, there are key differences that distinguish change management in social and human-service organizations as compared to for-profit organizations. This workbook has been designed with the DS sector in mind.

ODEN also engaged with high-performing organizations that recently went through significant changes and asked them to share their journeys through the process, to be documented in this workbook. These case studies can be found following Part Three of this resource, "Communicating and Processing Change"

We have combined what we have learned through these case studies and the real-world examples of the EMF projects, with academic theory and expert advice on change management, and created an applicable resource that takes the guesswork out of change. It is our hope that this interactive workbook will support you in change processes in ways that are informative, inspiring, and relevant for your organization.

How to Use the Workbook: *Re-Imagining Change* is meant to walk you through making a specific change, or changes. This workbook is meant to be used by those in your organization who have the vision, capacity, and authority to make change. More than a how-to guide, this workbook is a template for creating and carrying-out specific change plans. It is a reusable resource which can and should be used every time a significant change needs to take place within your organization.

The purpose of this workbook is to harness the potential of changemakers within your organization, while supporting them through the areas they may find difficult. It is also meant to provide your organization with a record of the change process. Careful planning and recording are essential to successful change plans, as they help with clarity, continuity, accountability, and measurability while change is occurring. They also provide an opportunity for reflection and learning after the change process is complete.

For these reasons, no matter how confident you feel about pursuing change after completing this workbook, we recommend that you turn to the resources in this workbook every time you encounter a need for change. We advise against skipping steps in the process. Using the activities and templates provided in this workbook fully will ensure that the necessary resources, planning, and methods of change-tracking are in place every time change needs to take place.

This workbook is divided into three parts that will guide you through the change process.

- **Part One:** *Introduction to Change* describes change generally, and it helps you to determine if your organization is ready for change, and what type, once you have identified where you are in your change journey.
- **Part Two:** *Understanding, Planning, and Executing Different Types of Change* provides you with the education and tools necessary to carry out your change.
- **Part Three:** *Communicating and Processing Change* helps you to communicate your change plan to stakeholders, and to understand and reflect on the change cycle you've just completed.

This resource is called a workbook for a reason — change requires work! With this in mind, we look forward to guiding you on your change journeys, and we are excited to hear about your positive outcomes.

PART 1

Introduction to Change

With limited resources and staff, and countless people to serve, sometimes it feels easier to simply stick with what we know when delivering services, rather than trying to change. At the same time, we are all committed to better outcomes for the people we serve. We often experience frustrations with and limits to how effective we can be when providing services. Organizations need to continually problem solve and innovate to best serve their communities. Change is inevitable. But change, when approached logically and methodically, doesn't have to be overwhelming. In fact, it can be a highly positive experience if handled effectively!

When approaching change, it can be tempting to dive in with both feet. Change can be an exciting and hope-filled prospect! But the cliché that “change doesn't happen overnight” is true. To create effective and lasting change, you must develop a plan of action to see you through the process.

You may be asking yourself where you ought to start changing your organization. If you've had conversations about change with even just one other person in your organization, then the change has begun.³

Change vs. Change Management. What's The Difference?

Change is not a one-time event, but a series of events leading to new outcomes. The more mindful you are about those events, the better your chance of a positive outcome. Keep in mind that this series of events may differ, depending on the type of change you are trying to achieve.

Generally speaking, the change process starts with a vision of how to make things better. It is followed by an action plan to execute that vision, with an expected set of results or outcomes from making that change. “Change is not simply removing problems or issues in the existing status quo. It is about creating an environment of new opportunities.”⁴ Conscientious change, then, is not simply making things different. Rather, it is taking thoughtful steps to achieve positive outcomes. Change intended simply to “shake things up”, or get out of a rut, is not meaningful change.

“Change is not a one-time event, but a series of events leading to new outcomes.”

Change and change management are two related but different things:

- Change is both the process and the outcome of taking new steps.
- Change management is **a system** for shaping those processes and outcomes.

Experts describe it as, “the systematic approach and application of knowledge, tools and resources to deal with change. It involves defining and adopting... strategies, structures, procedures and technologies to handle changes in external conditions and the business environment.” They state that, “The primary goal of change management is to successfully implement new processes, products and business strategies while minimizing negative outcomes.”⁵

Even the most well-thought-out changes require some maintenance. So don't be discouraged if there are some hiccups in your change plan, or if you find yourself needing to make additional changes down the road. "Remember: Change is a constant series of readjustments... All Change is temporary."⁶

Types of Change

Change affects every aspect of our lives. It is no surprise, then, that we experience different types of change, depending on circumstances. Research on the nature of change in developmental services reveals that change in the sector generally falls into one of three categories:

1. Change That Is Desired:

- Change that your organization is inspired to make based on internal motivating factors. It generally comes from a place of inspiration, and a desire to improve outcomes.

2. Change That Is Required:

- Change that your organization must make based on external factors. This type of change is premeditated, and has a purpose and rationale. But is determined by an outside force. The process of making that change, however, is driven within the organization.

3. Change That Is Compelled:

- Change that your organization must make based on external factors that are NOT premeditated. This type of change is in response to emergent situations, often driven by non-human forces, such as a pandemic, or an extreme weather event.

Change is complex, so to help you better understand these types of change, here they are explained in detail.

CHANGE THAT IS DESIRED — CREATING CHANGE

The first category of change — Change That Is Desired — is a type of change with which we are all familiar. It's a drive for change that is rooted in inspiration, and often strikes us when we are feeling stuck in a rut. Things might be going fine in our lives, but we feel they could be better. We don't feel we have to make a change. We *want* to make a change.

On a personal level, that can mean upgrading to an electric car, or reorganizing the living room. At an organizational level, it can mean designing a new employment services program, or introducing new technology. Whatever the specific change, it is generally felt to be positive and exciting. Rather than reacting to a problem, this type of change involves being proactive. Often the focus of change that is desired is on better practices, rather than problem-solving. For example, in the case of the new employment services program, it wasn't that your employment services program was failing, it was that you wanted it to perform better.

This type of change typically begins from a positive place because it is intrinsically motivated. In other words, the change starts with you. You feel ownership over the change. As a result, you feel competent and eager to tackle it. At the outset of this type of change, you may feel inspired, excited, and passionate. That's terrific! Try to harness that energy, because even change that is desired is hard work.

CHANGE THAT IS REQUIRED — EMBRACING CHANGE

The second category of change — Change That is Required — is another category of change you have likely encountered. This type of change is typically rooted in someone else's idea of inspiration, and it is imposed upon us. We don't necessarily feel like we need to make a change. We are *told* to make a change.

On a personal level, that can mean a municipality telling you to get rid of a tree in your front yard because its root system is overgrown, or your doctor telling you to reduce your intake of cholesterol. At an organizational level, this type of change can mean being told by the person you rent your office space from that they aren't renewing your lease, and you must move to a new location. This type of change usually involves reacting to a problem that you yourself didn't identify or perceive, but one with which you must deal nonetheless. It might seem confusing, frustrating, or disruptive in the short-term, but it is usually requested to promote positive outcomes in the long-term. In the case of the overgrown tree, you might resent the pain of removing and losing the tree, but in the long run you will protect your pipes and your foundation by doing so. In the case of not having your office space lease renewed, you might begrudge having to give up the comfort of your location, and do the work of moving your programs, but this could lead to creating better services for your clients. Change that is required is, ideally, change worth making. It just might take some getting used to.

CHANGE THAT IS COMPELLED — HARNESSING CHANGE

The third and final type of change — Change That is Compelled — is a type of change that is less common, but which has become all too familiar because of COVID-19. It is rooted in immediate need, and often strikes us when we least expect it. Things might be going fine in our lives, but then they are suddenly disrupted. We don't expect to make a change, but we are forced to.

On a personal level, this type of change can mean an unexpected job loss, or a diagnosis with a serious illness. At an organizational level, it can be a global pandemic that disrupts service delivery, or an extreme weather event that destroys the building we work in. Whatever the specific type of change, it is generally felt to be negative, and even frightening. The focus of change here is rising to a difficult occasion, as well as dealing with the immediate consequences of a change that has already occurred. Another hallmark of this type of change is that there is little time for implementation. The change must take place effective immediately.

This type of change almost always begins from an external place. It is externally motivated, but often beyond our control. In the case of a serious illness like cancer, there is no human agent who caused the change, though it is up to the people impacted by the diagnosis to reorient their lives around it. The same is true of a pandemic, as we now know. Nobody wanted or asked for this, and yet we have been forced to change nearly every aspect of our lives because of it. There is a sense of disbelief, and maybe even denial around these types of changes.

Interestingly, "Non-profit organizations are frequently called upon and play vital roles during times of crisis." Many non-profits are key players in disaster relief. DS organizations are no strangers to dealing with critical issues such a poverty, housing issues, and mental illness. However, "What is different during the COVID-19 pandemic is that many non-profit organizations 'are struggling with how to help their communities while also trying to endure the crisis themselves.'" As such, "Even though the non-profit sector reacts to social, political, organizational, and personal forces on a regular basis, the pandemic is unprecedented in the breadth and magnitude of these forces happening simultaneously."⁷ This is what makes change that is compelled so challenging. It often requires people and organizations to make changes when they aren't in an ideal place to do so.

We learn to adapt quickly when dealing with this kind of change. For Change That is Desired and Change That Is Required, we have time to implement the change. This can mean losing focus, delaying the work, or becoming disenchanted with the change process. By contrast, “The more imminent the Change, the more people can relate and respond to it...Distant Change is less ‘real’ than imminent Change.”⁸ Imminent change can inspire people to rise to the occasion. We should celebrate and honour those who are able to do so in the face of overwhelming circumstances.

Why Embrace Change?

“You will confront change whether you want to or not, so you should be prepared to tackle it with confidence and purpose.”

Since all change is temporary, and so much of change seems beyond our control, it can feel overwhelming or even pointless to embrace change. You can choose to see the inevitability of change as a never-ending obstacle to work around, or a series of opportunities that you can prepare for. Your mindset will be one of the first things that steers your course through change.

Consider this advice from ODEN’s original change management guide, *Roadmap to Inclusion*: “The secret, of course, is creating a mindset where the act of learning is seen as an opportunity and not as a threat. There’s no easy solution to creating this shift in perspective...In many ways, it is a personal decision to see everything as an opportunity rather than as the act of a malicious universe.”⁹

When you embrace the prospect of change, and you welcome the opportunity to learn and grow through change, you are on your way to becoming a part of what experts call a ‘learning organization’.

Characteristics of a learning organization include, the capacity of the organization to adapt and maintain itself in the face of internal and external changes; continuous learning; participation and accountability by a large percentage of staff; a culture and structure that allows for rapid communication; and knowledge-generation and sharing throughout the organization.”¹⁰

So much of whether a change represents something positive or negative depends on the mindset of the person responding. The more you understand and are prepared, the better the outcomes. The truth is, “there is no easy path for change management. The change strategy depends on the present situation, the history, the future you are trying to create and how difficult you make the journey from here to there.”¹¹

Change and the DS Sector

Not only is change inevitable, but it is also sometimes necessary. Change affects all of society, but the *need* for change can be particularly strong in the social services sector. After all, “An effective public social service...agency must be adaptable, creative, and responsive as it is subject to... ever-changing political, economic, fiscal, and knowledge environments.”¹²

It goes without saying that organizations want to support the best quality of life for the people they serve. However, the desire for positive outcomes goes beyond good intentions. “Agencies are faced with increasing demands and an ever-present emphasis on performance, accountability, and the avoidance of negative or unacceptable outcomes.” As a result, “public agencies, particularly

those that provide...social services, are increasingly aware of the benefits of becoming a learning organization.”¹³ A key part of becoming a learning organization is embracing change.¹⁴

“ There are aspects of this work that challenge us to rethink our roles and our commitments to the people we care about. Building connections is intentional, strategic and purpose driven. Pursuing change in the sector should follow suit.”

It is important to note that resistance to change is a healthy part of the change process. People and organizations who are willing to abandon everything they’ve worked toward without questioning what comes next are as detrimental to an organization as people who stubbornly cling to the status quo. Your experience, insights, and feelings should be taken into consideration. In fact, healthy organizations “don’t want to rely on those who easily discard their competencies because something new is available. We need and want people to fight to retain their hard-earned levels of care and support until they’re convinced that the change is a positive one.”¹⁵ Resistance is a form of engagement. It shows you care about what is happening in your organization. Strong organizations, “need and want people to resist change that doesn’t provide a reasonable expectation of a solid payback. They require people to resist innovative ideas that are simply cool and trendy, but which offer no significant benefit and significant risk.”¹⁶

Like change itself, the status quo isn’t inherently good or bad. “Status quo” simply means “current situation.” If the current situation is serving all stakeholder interests and producing the desired outcomes, by all means! Stick with the status quo.

But the fact is that the sector has changed, and it is continuing to change before our eyes.

For example, organizations are working hard to eliminate barriers through innovative programming. This type of change falls under the category of Change That Is Desired.

MCCSS’s directive to close sheltered workshops and end segregated employment represents another type of change in the sector. This falls under the category of Change That Is Required.

Finally, the effects of COVID-19 on service delivery in the sector have introduced changes to the sector in the short-term, changes which may continue to be relevant longer term. This type of change can be described as Change That Is Compelled.

With all this change happening around us, it is up to you whether you want to be a change agent, or a change recipient. But what does this mean for your organization? And how do you know if you’re ready to make a change? Consider:

- **Is your organization currently in the midst of change?**
- **Has your organization been resistant to a change that is inevitable?**
- **Is your organization eager to make a big change, but unsure of where to begin?**

The Step Before the First Step

The next few activities will help you to determine where you are in the change process, and what type of change is relevant to your organization's current needs.

The first step of the change-making process isn't one of action, but one of consideration. Ask yourself if you are ready to make a change. While it is important for us in the developmental services sector to stay current with our practices, and to innovate where we can, it is also important to not bite off more than we can chew. We know all too well the strain on time and resources in our sector, and we can't afford to spend time and energy on projects that may not be of benefit.

There is nothing wrong with accepting that now might not be the right time to make significant changes to your organization. On the other hand, you might be in better shape to embrace change than you think. To determine if your organization is in a good position to make a change, complete the following Change Readiness Checklists.

ACTIVITY: Change Readiness Checklist



Use the **Change Readiness Checklist** in Appendix A, on page 46.

ACTIVITY: Categorizing Change Checklist



Use the **Categorizing Change Checklist** in Appendix A, on page 48.



Knowledge Check

By this point in the workbook, you should:

- ✓ Understand what change is
- ✓ Understand why it is important to embrace change
- ✓ Know the difference between “change” and “change management”
- ✓ Understand the three categories of change defined in the workbook
- ✓ Have determined if you are ready to make a change
- ✓ Have determined which category of change yours fall into (if you already have a specific change in mind)



PART 2

Understanding, Planning, and Executing Different Types of Change

Becoming a Change Leader

Now that you understand more about change, change management, and reasons to embrace change, it is time learn how to become a change leader. But where to start? “Before implementing a change, we must understand all the reasons for it. We must become experts in the change being proposed, or reacted to, because people will look to us for answers. They might even look to us for guidance. At the very least — **Is the change necessary?** — will be asked by everyone impacted by it. It would be nice to have an answer.”¹⁷

“It is one thing to have a vision for change. It is another thing to be able to explain that vision, and to see it through.”

How you manage change is as important as the change being made. Experts in human resources note, “The ability to manage change is more critical than ever, as the upheaval caused by the pandemic has shown.” And while not every change is as high stakes as those brought on by the pandemic, experts agree that change management is “a skill more HR professionals should cultivate.”¹⁸

The fact is, studies show that, “even before the challenges of a world health crisis complicated matters, most change initiatives failed.”¹⁹ A common reason for the failure is that business leaders often don’t take the necessary steps, or don’t involve the right people in the change process until it is too late. According to one senior manager for people development, “leaders belatedly ask HR to help ‘fix people.’”²⁰ When their vision for change is going badly, and when people within the organization are resistant to the change, some leaders “treat the end user as the root cause of the problem for not embracing change, when the real problem was the lack of consideration for the people who would be impacted.”²¹ Stakeholder involvement is essential, and should be prioritized from the get-go. Communication is key.

There isn’t a one-size-fits-all approach to change management, as you will see from the case studies following Part Three of the workbook. But there are basic steps to change management you can adopt.²²



1. Analyze what needs to change and who is impacted



2. Develop a plan to change it



3. Execute the plan



4. Measure the results

Note that the first steps involve understanding the change at hand and involving the right stakeholders. Prioritize this in your change plan, and you'll be ahead of the curve. Neglect this step, and you'll struggle to create meaningful change. This may seem obvious, but research shows that "people often do only the second and third steps — they just develop and execute a plan." They dive headfirst into change, and "They don't analyze all potential impacts first, and they don't have a metric by which to measure whether it's successful and sustainable."²³ Change leaders understand that laying the groundwork is key.

When we talk about becoming a change leader, that doesn't mean becoming a change perfectionist. Nobody is perfect, and some parts of the change process will be out of your control. For example, no matter how thorough your change plan is, realistically you can only deal with likely events and outcomes. There may be things you can't account for in your change plan, but the more experienced you are with managing change, the better you will be at dealing with those things as they come. And the more you involve the right people in your change plan, the more support you will have in managing your plan.

“ Becoming a change leader doesn't require becoming a change perfectionist.”

Just remember that being an effective changemaker takes time. That is why we designed this workbook to be a resource you can revisit and reuse whenever you need it. After all, "Doing something new means you'll do it wrong at first. You'll do it wrong until you learn how to do it right." The first time you attempt to make a change using this workbook as a guide, you will be more effective at change management than before you had this resource. But you will be far from perfect. "Even learning what doesn't work is an important form of progress."²⁴ It is important to remind yourself, and your team of this fact. It will keep you motivated as you work to become change leaders.

Theory of Change

In Part One of this workbook, you completed a Change Readiness Checklist to determine your ability to tackle change. Next you completed a Categorizing Change Checklist to figure out what type of change you are preparing to make. Now that you have determined your organization's change abilities and needs, it is time to develop your "Theory of Change". A theory of change is a method for brainstorming, creating, recording, and executing your change plan.

Your theory of change is your specific vision of the kind of change you hope to make. Engaging with the theory of change process should take you from an abstract idea such as, "I want to improve quality of life and outcomes for people who have a disability," to a concrete set of ideas about exactly what kind of outcomes you want to achieve, for whom, and how.

Included in this workbook are six activities to help you develop your theory of change. Each activity is labelled as a distinct step in the change process and can be found throughout this workbook in its relevant section. When completed, taken together these six activities will form your theory of change.

As you complete this workbook, we ask you to consider your present organizational needs in concrete terms. We all are invested in improving the lives of people who have a disability, and in making the world a more inclusive and accessible place. But what exactly does that mean to your organization? What does that look like in practice?

CONSIDER THESE QUESTIONS:

- What problems am I trying to solve within my organization?
- What is the mission of my organization?
- What are some of its short and long-term goals?
- What kind of change am I trying to enact within my organization?
- What outcomes am I trying to facilitate through change?

We cannot solve problems we have not identified; and we cannot properly choose and apply solutions to problems we don't understand. Take some time to take stock of what it is that you hope to get out of the change-making process.

ACTIVITY: Step 1 — Preparing for Change

As the saying goes, “preparation is the key to success.” Devote ample time to this phase of change, and you will find yourself with a well-oriented plan. Skip it, and you'll find yourself lost. When beginning your theory of change, you should consider your organization's mission and values, its goals, and its present needs. Change should be rooted in purpose. The following prompts will help you to take stock of where your organization stands, what its needs are, and where it is going.

Why am I considering making a change?

What is the organization's mission? What are its core values?

Who are the organization's key stakeholders?

What are the organization's needs and goals? Short-term? Medium-term? Long-term?

Brainstorm some changes that could be made to address these needs/goals.

Once you have determined your organization's overall mission, its specific needs, and its short and long-term goals, you must consider the people you are serving, and the resources you have available to serve them.

Who am I trying to serve through these change-making activities?

What demographic am I planning for?

What resources do I currently have to affect change (human resources, funding, community connections)?

What foundation do I need to have or to establish to affect the change I am seeking?

What do I know about the type of change I am trying to make?

What evidence do I have that this is an effective change/the right change for my organization?

After you have determined the answers to these questions, consider what kind of change you can realistically and effectively achieve.



Use the Step 1 — Preparing for Change Worksheet in Appendix A, on page 50.

“ While it is important to strive for ideals, it is also necessary to be mindful of what is necessary to achieve those ideals. When attempting to affect change in your organization, it is important to be optimistic as well as realistic.”

ACTIVITY: Step 2 — Analyzing Change

Now that you’ve determined your organization’s foremost needs and goals, and you’ve identified some potential changes you can make to support those needs and goals, it’s good to survey the information and resources available to help you make informed decisions about change. Another term for “analysis” in this case is “survey.” You are responsible for surveying where your organization is, where the sector is, and where your proposed change fits within them. You’ll want to ensure that the inspiration that struck during the planning phase is well considered, and is examined from all angles, before proceeding with implementation. The following prompts will help you vet changes you are considering.

What evidence do I have that the change I am considering is necessary?

e.g., Internal data, stakeholder feedback

What evidence do I have that the change I am considering is effective?

e.g., External research, promising examples from partners in the sector

How are other organizations addressing similar issues?

Where can I find the evidence to make an informed decision? If not available, how can I gather data to inform the decision to make a change?

e.g., External research, conducting surveys

Is there a precedent of promising practices that I can apply to the problem I am trying to solve? Or am I starting from square one?

What is the timeframe for completing this change?

What is the budget for carrying out this change?

Who should be involved in making this change?



Use the **Step 2 — Analyzing Change Worksheet** in Appendix A, on page 51.

ACTIVITY: Step 3 — Establishing Consensus

Once you have assessed the need for change, analyzed different ways of approaching that change, and vetted processes for making the change, it is time for the appropriate stakeholders (typically senior leadership and management) to reach a consensus on making that change. Consensus does not mean that everyone agrees on exactly how to implement change. Inevitably, people will bring different views to the table. It is good to consider alternative suggestions and feedback. Consensus means getting stakeholders to buy in and sign off on a chosen change plan. When you consider everything from the preparing and analyzing stage, which plan makes the most sense, and has the most stakeholder support? That is the plan you should pursue. To achieve consensus, consider:

Who gets a say in determining the change plan?

e.g., Just senior leadership? Management too? What about stakeholders in the community?

How will we evaluate our change plan options?

e.g., Based on feasibility? Popularity? Using what metrics? If within budget, an external evaluator may be useful at this stage of planning.

How will we resolve disagreements about the change plan?

Who gets final say on the change plan?

How will we address the concerns of those who aren't on board with the change plan?

How will we encourage buy-in of the change plan once it has been determined?



Use the Step 3 — Establishing Consensus Worksheet in Appendix A, on page 53.

Communicating Change

Once you have achieved consensus among the appropriate stakeholders on the nature of the change plan, it is time to communicate to your wider group of stakeholders that change is coming. Do not underestimate the importance of this step. Stakeholders want to feel included and respected in the change process, to know their role in it, and to understand how they will be affected by the change. A **Stakeholder Identification Chart** is a good to place to start when considering who will be affected by change, and how. Consider using this example template from MCCSS when working through the stakeholder identification process.

#	Stakeholder Group	Key Interests	Key Stakeholder (Y/N)	IMPACT ANALYSIS							COMMUNICATION TOOLS & STRATEGIES
				Anticipated Reaction to Change (negative, neutral, supportive)	Description of Reaction (to proposed changes)	Directly Impacted by Change (from N/A to high)	Area of Impact (from N/A to high)				
							People	Process	Structures	Comments	
Internal											
1	Organization										
2	People and families										
External											
3	Wider Community										

Analyzing Impact

A stakeholder impact analysis chart can help you organize your thinking around these questions. This will also help you anticipate stakeholder reactions, help you develop communication strategies and tools in anticipation of those reactions, and capture *actual* stakeholder reactions to improve how you communicate and manage your change moving forward.

We cannot overstate the importance of continuous stakeholder engagement throughout the change-management process. Who you engage is just as important as how you engage them. The more time you spend thinking critically about and thoughtfully engaging with stakeholders, the better your change plan will be. You will be prepared to make meaningful, impactful change that will resonate positively with your stakeholders. Stakeholder buy-in makes the process of enacting change that much smoother.

ACTIVITY: Step 4 – Communicating Change

Once you have identified who needs to be informed of and included in impending changes, consider the specifics of how they should be included, and how you can communicate their inclusion most effectively. In addition to the questions posed during the stakeholder identification process, ask:

What is the best way for stakeholders to receive this information?

This will vary by stakeholder. In the DS sector it is particularly important to match your communication style to your audience, to ensure your message is accessible.

How much do they need/want to know about the change?

Who else will be involved in the change, and what will their roles be?

Will there be an opportunity for feedback on the change?

If so, how will this feedback be handled?

Who can stakeholders come to with questions about the change?



Use the **Step 4 – Communicating Change Worksheet** in Appendix A, on page 54.

ACTIVITY: Step 5 – Activating Change

Once you have committed to a change plan, it is time to see it through. Now is the time to execute the plan you have worked so hard to develop. To effectively carry out your plan, you must determine:

What specific activities need to be carried out to fulfill this change plan?

What are the deliverables/outcomes that need to be achieved?

Who will be responsible for these activities, and who will they report to?

How will progress be tracked?

How will you know when the change process is complete?



Use the **Step 5 – Activating Change Worksheet** in Appendix A, on page 55.

RACI Matrix

An effective method of organizing the answers to these questions is a RACI matrix. This is a chart that outlines key responsibilities, roles, milestones, and timeframes for a given project within an organization. What you include in your RACI matrix will depend on the exact nature of the project.

THE RACI ACRONYM STANDS FOR:

Responsible (R): The person who does the work to actually complete the task. As a rule, this is one person. Examples might be a program manager, a project manager, or an employment specialist.

Accountable (A): The person who is ultimately answerable for the completion of the task. This includes decision-making authority and veto power. Only one accountable person can be assigned to a task. Examples might be an executive director, or chief executive officer.

Consulted (C): The people who provide information for the change plan and with whom there is two-way communication. This is usually several people, often subject-matter experts. Examples might be a stakeholder who has a disability, a consultant, or a program manager.

Informed (I): The people kept informed of progress and with whom there is one-way communication. These people are affected by the outcome of the task, so they need to be kept up-to-date. Examples might be community members, funders, or employment services staff.

Here is an example of a RACI matrix that you might use when introducing a major change to your organization. The size and complexity of your matrix will depend on the change you are attempting to make, and who is involved. This is just one, simple example, but it gives you an idea of what the process looks like in practice.

TASK	Executive Director	Project Manager	Consultant	Employment Service Provider
Apply for funding	R	A	C	I
Research New Employment Programs	C	A	R	I
Draft Change Management Plan	A	R	C	I
Trial New Employment Program	I	A	C	R
Measure Impact of Tried Program	I	A	R	C

ACTIVITY: How to Create a RACI Matrix

1. Identify all the tasks involved in the change-management process, and list them on the left-hand side of the chart in completion order, from first to last. For example: Applying for funding, hiring a consultant, drafting a theory of change.
2. Identify all the roles and list them along the top of the chart. For instance: project manager, consultant, impact measurement expert.
3. Complete the chart by identifying who has responsibility (R) and accountability (A) for each task, as well as who will be consulted (C) and informed (I).
4. Ensure every task has a role responsible (R) and a role accountable (A) for it.
5. No tasks should have more than one role accountable (A). Resolve any conflicts where there is more than one role accountable for a particular task.
6. Share, discuss and agree on your RACI matrix with those identified in the roles, as well as others actively involved in the change management process, prior to beginning your hands-on work together.



Create your own RACI Matrix in Appendix A, on page 56.

Logic Model

Another resource you will want to develop during this phase of change management is a logic model. This is a graphical representation of the relationships among inputs, change activities, and desired outcomes. Like the RACI matrix, the way you design your logic model will depend on what change you are trying to accomplish. Generally speaking, a logic model should resemble a flow chart where the cause and effect among variables is clear, ie., What effect will this input have on this activity? What should be the outcome of this activity? What is the next step following this outcome? And so on. We have included a generic logic model template to help you envision what your logic model might look like.²⁵

Inputs	Outputs		Outcomes - Impact		
What we will invest	Activities — What we will do	Participation: Who we will reach	Short-Term Results	Medium-Term Results	Long-Term Results
			Learning	Behavioural Action	Ultimate Impact
Assumptions			External Factors		
<div style="font-size: 4em; opacity: 0.3; transform: rotate(-15deg); display: inline-block;">example</div>					
Evaluation					

Keeping a Record of Change

“ Incremental and effective change is more beneficial than radical and ineffective change.”

It is important to keep a record of your change process at all stages. Your theory of change, RACI Matrix, and logic model all will help you keep a record of your work as it unfolds. Change takes time, and the further along you are in your journey, the easier it is to lose track of your original goals. Keeping a record of all steps in your change plan will keep you focused and accountable.

This doesn't mean you can't change course from your original plan.

“ Change is a learning process, not a linear one.”

If you learn something on your change journey that suggests taking a detour will create better outcomes, then changing course is the smart thing to do. Looking back over the record of your change journey will tell you whether you simply got lost on your journey and need a course correction; or whether your destination changed and you need to find a new route.

Reflecting on your change work is an important but often neglected part of change management. The world of work these days is fast paced, and the drive to finish on time doesn't encourage reflection. But if you want to become a change leader, you must make time for reflection. Otherwise, you will miss out on key learning opportunities. These learnings can be applied to change in progress, or they can be used to create a better and more informed change plan the next time around. Careful record keeping will help you better reflect on, and learn from, your change journey.

As important as it is to record your change while it is in progress, it is equally important to document the outcomes and impacts of your change once it is completed.

“ What you learn from change is, arguably, as important as what you achieve through change.”

ACTIVITY: Step 6 — Measuring Impact

The entire point of change is to create an outcome that has a desirable impact on stakeholders. Once you have completed your change plan, you need to evaluate the outcomes of your plan to determine if the change was successful, or if further change is necessary. You will also need to communicate the completion and impact of your change to stakeholders. Consider:

How will you track and record outcomes throughout your change plan?

How will you protect the data collected during your change plan?

How will you use the information collected from your change plan?

If outcomes are not matching expectations, how will you navigate your change plan moving forward?

What contingencies will you build into your change plan to maximize your outcomes and impact?

How will you measure impact on stakeholders? Describe your methods of tracking and recording impact.



Use the Step 6 — Measuring Impact Worksheet in Appendix A, on page 57.



Knowledge Check

By this point in the workbook, you should:

- ✓ Know what it takes to be a “change leader”
- ✓ Understand what a “theory of change” is
- ✓ Know how to create and document your own theory of change
- ✓ Know how to execute and track your change plan using a RACI matrix and a logic model



PART 3

Communicating & Processing Change

Acknowledging Change

You are nearing the end of your change journey now. Congratulations! You've come a long way. We hope you are excited about the changes ahead. As excited as you are to move forward, keep in mind that everyone reacts to, and processes change, in different ways. Those who were resistant to the change may feel left behind, and they may require some time to catch up. Those who were excited about the change may be feeling underwhelmed by the outcomes. Still others may be happy about the change overall, but feeling nostalgia for the old way of doing things.

It is important to acknowledge that a change has taken place; that change impacts everybody differently; and that some time may be needed to adjust. As we advised in *Roadmap to Inclusion*, "Celebrating a new achievement in a way that also includes respect for the past is the goal. We do not want to disrespect any part of the journey that contributed to the New Status Quo, including the old Status Quo starting point. The objective is to recognize that we've grown and moved forward."²⁶ Allow people sufficient time to process, grieve, reboot, adapt, and learn from the change that has been made. Not everyone started on the change journey from the same place. Space must be granted until everyone catches up.

Communicating and Involving

By this point in the journey, several things should be apparent: Change is inevitable; change is complex and varied; change management is both an art and a science; and communicating through change is paramount.

At every stage and every level of change, communication is essential. Whether it's:

- Senior leadership communicating with managers that change is coming;
- Consultants communicating with project managers about how best to execute change;
- Directors communicating with funders about how a particular change initiative is going;
- Support services staff communicating with people being served about impending changes;
- Communications teams informing their communities about changes happening within an organization.

At every stage and every level of change, communication is essential.

How you frame change will influence buy-in from stakeholders. In *Roadmap to Inclusion*, we emphasized this point: "Remember, people resist being changed without their consent and with no control over the process. This will become a central theme when you begin to consider how to start your transition to a New Status Quo."²⁷ Because of its inevitability, people are used to change. It is not so much change itself that people resist, but change that they don't understand, or change which they believe will negatively impact them.

If you are using this resource, chances are you have the authority to be a change leader within your organization. But being a change leader is different than being a change authoritarian. You may have the power to initiate change, but you won't be the only one carrying out the change. Nor the only one impacted by it. Change requires involvement by all stakeholders, and it should be an inclusive process. "The more deeply people are involved with decisions surrounding change, the more likely change will occur smoothly."²⁸ Consistent, transparent communication keeps stakeholders feeling involved and respected.

Communicating with and involving stakeholders is not just for their benefit. It's for the good of the changemakers as well. "Regardless of the change we're facing, it is a mistake to assume we must embark on the transition alone, using only the resources immediately available to us. Regardless of the change we are facing, others have faced it in the past, are facing it currently and will face it in the future."²⁹ Changemakers need to rely on the perspectives, experiences, and wisdom of those around them to make well-informed, inclusive change. "It's far easier to succeed if we take the time to learn from others, from both their failures and their successes. We must move away from the idea that to be a success we must succeed alone. There is absolutely no reason to attempt major change on our own. Especially change that can and will affect the lives of those we support."³⁰

According to change-management experts, plans for making change that actually hinder change, have these characteristics. They are too:

- **Top down.** Executives relate their vision of what the end result of the change initiative should be, but do not give direction or communication on how the managers should make the change happen.
- **Big picture.** The organization's leaders have a vision of the change but no idea of how that change will affect the individuals who work there.
- **Linear.** Managers work the project plan from start to finish without making necessary adjustments.
- **Insular.** Most organizations do not seek outside help with change initiatives, but businesses may need objective external input or assistance to accomplish major changes."³¹

At every turn, you should consider who will be impacted by the change you are making, and how they should be involved in the change process.

When you developed your Theory of Change, **Activity Step 3 — Establishing Consensus** asked you to consider how you would communicate and collaborate with stakeholders at higher levels to develop a change plan that your organization could get behind. At this stage you were establishing buy-in among those who would ultimately help you carry out your change plan.

Activity Step 4 — Communicating Change asked you to consider how you would inform stakeholders at lower levels of impending changes. At this stage you were being accountable to the people likely to be impacted by your change plan, and giving them the opportunity to provide feedback.

Once your change plan has been executed, you must inform stakeholders of its outcomes. This next activity will help you determine what and how to communicate with stakeholders.

ACTIVITY: Reporting Change

After the change plan is complete, consider:

How will you report on and communicate outcomes to stakeholders?

e.g., Newsletter, roundtable, local media

How will you use what you have learned from the change process/data collected during the process to improve service delivery?

How might data collected and impact measured inform future change initiatives within the organization?



Use the Reporting Change Worksheet in Appendix A, on page 58.

Sustaining Change

Throughout this workbook, we have tried to get you comfortable with the idea that change is inevitable. There is no denying this. While it is inevitable, that doesn't mean that change should be rapid and constant. Ideally, a change will be well communicated and planned in a way that makes it sustainable. Smart change plans will have contingencies built into them so that they can be adapted to a variety of needs and circumstances. Assuming your change yielded positive outcomes, you should follow through with it for as long as it serves its purpose.

When new knowledge, changes in stakeholder needs or other driving facts necessitate change, back to the drawing board you'll go. For example, when there's a change in material or human resources, or a change in leadership. And when you do, be sure to consult this workbook to help create new and meaningful change! But unless and until those things happen, you should strive to make the most of whatever changes you have made. As you have now learned, change is an involved process, and not one that should be entered into or abandoned lightly.

One academic research publication found, "Millions of dollars are spent in our communities each year with little impact on the social conditions that continue to create problems for individuals and families. Needs assessments are conducted, programs and services are envisioned, proposals are funded, and interventions are delivered. Yet, the problems endure. In our view, the trouble is that most human-service practice is designed to be ameliorative rather than transformative."³²

In other words, most changes within the human-services attempt to put band-aids on wounds rather than to eliminate the conditions causing the wounds in the first place. Sustainable change in the DS sector ought to prioritize eliminating barriers, and promoting social and cultural change that creates new conditions for people who have a disability to live, work, and play. Changes that promote the full inclusion of people who have a disability into their communities as the status quo are changes worth investing in.

We thank you for taking this journey through change management with us. Congratulations! You are now change leaders. We look forward to seeing the work you do as change leaders in your communities.

We now invite to read about some changes happening in DS organizations across Ontario. We hope these case studies demonstrate change in action, and that they help you to envision what change management looks like in the real-world. Enjoy!



Knowledge Check

By this point in the workbook, you should:

- ✓ Understand the importance of maintaining communication with stakeholders throughout the change process
- ✓ Know how to communicate outcomes and impacts to stakeholders at the conclusion of your change plan
- ✓ Understand how to support stakeholders as they adjust to the new status quo
- ✓ Understand the importance of change that is well thought out, informed and sustainable



Case Studies

Case Study 1



Change That Is **DESIRED**

Innovative Community Support Services (ICSS) is a non-profit charitable organization located in Orleans, Ontario. ICSS is committed to creating and providing families & individuals with innovative, high-quality, and cost-effective community-based programs and services that promote a strong sense of well-being while positively contributing to their culturally diversified community.

ICSS's vision includes providing quality services and support to people with developmental disabilities and their networks. ICSS works to achieve their mission is based on 10 Service Principles as described in their website About ICSS. In general, the principles speak to the organization's commitment to upholding individuals' rights, respecting their dignity and independence, and focusing on individuals' abilities, personal growth, and full community participation.

In April 2018, ICSS successfully secured a two-year Employment Modernization Fund (EMF) grant to increase the focus on competitive employment within their existing programs for people who have a developmental disability and move towards community-based supportive employment.

This case study examines the pathway ICSS mapped to develop and deliver an employment service program for existing and new clients with complex support requirements.



Preparing for Change

ICSS prepared to embark on what this workbook classifies as *desired change* to reimagine and improve current employment opportunities programs delivered under the Community Participation Supports umbrella of Ministry of Children, Community and Social Services (MCCSS). They contracted external consultants (ODEN) to work on engagement sessions that included staff, leadership, clients, families, and other external contacts, to identify real and perceived strengths, opportunities, capacity, and areas to develop in the process of modernization for the organization's employment support offerings.

The engagement process followed an established but flexible procedure: the organization (ICSS) indicated a desire to transition from traditional day program activities of training and skill development to practical community-based employment supports. Several stakeholder engagement sessions were conducted to determine ICSS's capacity and requirements as they shift to full community

participation. The process concludes with ODEN providing recommendations for next steps that speak to their specific organization's needs and help sustain employment service delivery.

Analyzing Change

In April 2018, ICSS successfully secured a two-year Employment Modernization Fund (EMF) grant to increase the focus on competitive employment within their existing programs for people who have a developmental disability and move towards community-based supportive employment. This new initiative was called Opportunities: *Employment Support Program*.

Through the process of applying for funding, ICSS determine the areas of work that would be impacted by this funding. This evaluation became the basis and goals for the change they were seeking to achieve through the EMF project. These included:

- Improving knowledge and training of ICSS staff on developing and determining an individuals' potential for competitive employment. This staff development would support the transition from training and skills development programs to supported employment within ICSS's current Community Participation programs.
- Develop a program model that would address the range of employment supports needed
- To ensure employment inclusion for all people who have a disability.
- Create a framework for employment supports that considers:
 - Zero exclusion and an individual person-centered approach,
 - Understanding that everyone can be employed with the right job match and the right support,
 - Ensuring employers get the right employee and the job seekers gets the right job,
 - Sharing resources and working collaboratively to enhance services based in the community.

The new initiative, Opportunities: Employment Support Program, had three key objectives to meet:

- Transition ICSS traditional day program supports to community-based supports with competitive employment opportunities,
- Support 10-20 job seekers in this program,
- Provide competitive employment opportunities for people who have a developmental disability in a workplace-based in the community.

Establishing Consensus

Intensive stakeholder consultations were conducted to better understand the steps required to operationalize the transformational shift that ICSS was undertaking, from traditional day programs to practical community-based employment services.

These engagement sessions had two areas of focus: (1) to identify the current state of readiness to pursue a competitive employment program model and (2) the capacity of staff to transition into full community participation programming and service delivery for the job seekers they support. To gather insight into the population served and their needs, a tour of the ICSS program facility was conducted.

The engagement sessions revealed that a uniform vision exists among ICSS's staff, management, and leadership with respect to the definition of community participation. This uniform vision meant that ICSS was well-positioned to embark on this transformation of services, supported by clients and families who already were asking for employment type service from the organization.

ICSS identified potential concerns and barriers including staffing shortages, funding streams, waiting lists, and the large number of programs and services the organization currently offers, which may impede the ability to deliver quality service in the realm of supported employment. These concerns are also coupled with the potential barriers around revenue generation, attracting new participants, and delivering quality services for businesses, a new area that has the potential to sustain and grow the reputation of ICSS in their community.



Communicating Change

A discovery process by ICSS identified strengths and potential opportunities and examined exiting program structures. This work allowed future thinking on reallocation of resources to sustaining programs well beyond the ending of EMF grants.

In all engagement sessions with stakeholders, the participants identified strengths within the organization, including management and staff high degree of positive morale, and a desire to grow the organization. Engagement sessions with external stakeholders also revealed that many job seekers, the clients that ICSS works with, are currently employed, or have already had part-time positions and experience working. This was information that not all ICSS staff were aware of and was only discovered because of the stakeholder engagement sessions.

When asked, families confirmed that they were supportive of the goal for modernization for ICSS's Employment Supports Program. Job seekers were already asking for support from ICSS staff to obtain paid job opportunities.

The process of building awareness for what ICSS wanted to achieve from the modernization of employment services also uncovered some potential challenges. Challenges such inconsistent scheduling due to staffing shortage, high turnover rate with part-time employees, lack of capacity due to diverse programming and supports offered, and lack of program alignment with what participants requested.

These strengths and potential challenges were analyzed in-depth during discussions with ODEN staff and ICSS team members. Collaboratively these illustrated opportunities and potential threats to this project.



Activating Change

As noted previously, ICSS and their stakeholders collectively confirmed a series of opportunities to enhance community engagement and program delivery. These practices included enhanced fee-for-service offerings, community programming resources, implementing person-centered planning for new participants, individualized outcome measures, and support from the Ontario Disability Employment Network (ODEN) via staff capacity and development through training.

To kickstart ICSS's commitment to enhance staff capacity and development, ICSS received JobPath training facilitated by Diversity and Inclusion specialists from ODEN. JobPath is an award-winning and internationally recognized curriculum used to help students who have a disability successfully transition from school to work. JobPath is delivered in a series of workshops and provides youth the opportunity to learn about themselves and interact in a group setting while preparing for employment.

The second step that ICSS undertook to promote learning, knowledge expansion, professional development was to register 32 ICSS staff in the ODEN's Employment Service Provider Training administered by ODEN's Diversity & Inclusion Specialist in 2019.

The Employment Service Provider Training is designed specifically for organizations offering employment services for people who have a disability. Each day has a critical focus to enhance knowledge and learning. Day 1 focuses on building a foundation of understanding of employability. Day 2 focuses on in-depth marketing and job development and Day 3 involves discussions about the importance of job coaching, quality assurance, and customer satisfaction.

Findings from the post-survey administered following the ODEN Employment Service Provider Training showed that 94% of ICSS members stated they could apply what they learned from the training in their work. Participants also expressed that their top two takeaways were job coaching skills and learning how to best support & engage job seekers and employers.



Following the training received, ICSS regrouped and reflected on some of their core principles which strive towards individual focus and personal growth. These principles align with individualized pre-employment skills-building training for job seekers who do not have an employment history and have served well as the foundation for that “pre-employment” program.

Pre-employment skills are soft skills needed for work transition, and these skills may include “pathways” to manage stress and anxiety and increase self-confidence within oneself. ICSS staff also provided tools and resources to job seekers to help alleviate stress and anxiety while enhancing self-confidence at job interviews.

Another step that ICSS undertook to serve clients better as they enter the workplace was to adopt the MentorAbility initiative. In October 2019, ICSS became a Service Provider Partner for MentorAbility Ontario to amplify and raise awareness about meaningful employment and disability-inclusive hiring.

MentorAbility is a nationally supported employment initiative that facilitates unique, short-term mentoring opportunities between employers and people who have a disability. It was agreed that MentorAbility is a way to help job seekers and ICSS support staff with development during a period of pre-employment activities known as career discovery and exploration. ICSS matched job seekers to mentors from MentorAbility Ontario, and these matches helped with career guidance as job seekers became protégés of the program.

Through MentorAbility, job seekers supported by ICSS have participated in events that included businesspeople with experience in sales, owner-operators, early childhood educators, and animal groomers. These opportunities instilled self-confidence in job seekers and provided a channel to

discuss their passion and interests. Mentors talked about their roles and importance. ICSS tracked opportunities for skills building for the job seekers they support.



Measuring Impact

Following the training and professional development that ICSS staff took, it was time to engage more intentionally with a new stakeholder — the business community.

ICSS needed to reach out to the business community with a new message — focusing on raising awareness and addressing the impact of disability-inclusive hiring. To this end, ICSS introduced new branding: ICSS Employment Solutions, complete with a new logo — see figure 1.

To promote the message that inclusive hiring is a good business proposition, ICSS Employment Solutions reached out to employers who actively hire job seekers who have a disability to provide testimonials — business speaking to business is an impactful practice.

These businesses included Russell Foodland, Cross Fit Fortis, and Home Hardware. They all spoke to how inclusive hiring drives success, innovation within their businesses while increasing retention.

ICSS has implemented several recommendations addressed during the training sessions facilitated by ODEN: they have created a social media presence to connect with employers (LinkedIn) and job seekers (Facebook). Through these communication channels, ICSS is directly connecting all stakeholders and creating opportunities to showcase inclusive businesses.

This type of digital engagement has also helped promote ICSS Employment Solutions' work with both jobPath and MentorAbility. Throughout their Facebook page, job seekers' success stories are showcased, building confidence for job seekers, mentors, and the community at large.

ICSS and their Employment Solutions staff continue to work towards putting into practice the lessons obtained from their original project to transition traditional day program supports to community-based supports with competitive employment opportunities.

Steps and initiatives that ICSS took in 2019-2020 have resulted in significant engagement with all stakeholders as they create or refine programs to support more people who have a disability to enter the workforce. A clear example of this level of engagement includes the number of participants accessing MentorAbility in their first year of involvement. ICSS had 10 protégés accessing mentorship relationships, a great number considering that ICSS were looking to have 10 to 20 job seekers accessing their initiatives under the new Employment Support Program.

ICSS Employment Supports continues to move forward with initiatives that drive the business case message that disability-inclusive hiring is a great business proposition.

Figure 1. ICSS Employment Solutions Logo



Case Study 2



Change That Is **DESIRED**

When Cynthia Sparring took over the role of Executive Director (ED) for Career Services of Brockville in 2018, she was a person on a mission. With over 35 years of experience as an employment services co-ordinator, Sparring was equipped with both wisdom and insight about where employment services had been, where it was, and where it needed to go.

The previous ED, from whom Sparring had learned so much, had a keen business mind. His cost-consciousness ensured that Career Services of Brockville enjoyed longevity through a successful business model. The former ED had built a reputation of consistency and reliability for the organization. When Sparring assumed the ED role in 2018, she knew Career Services of Brockville needed to evolve and embrace the transformation of the sector to be more reflective of an inclusive community.

Over the past three years, Sparring has introduced a variety of cultural and programming changes to the organization, the latest of which is a virtual reality-based initiative called VjobReady.

Virtual reality (VR) is mostly known as the realm of gamers. But now — in Ontario, at least — it's about to burst on the scene in the disability employment sector.³³

From September 2021 through to March 2022, VR technology is going to be used to help 160 Ontario job seekers who have a disability get a feel for what it's like to work in the food and hospitality sector.

Sparring believes that VR will be a game-changer in the sector, literally and figuratively. She notes that it is the gamification aspect of the VR technology that Career Services of Brockville is using that makes it so appealing. It incentivizes users to master skills, achieve milestones, and push themselves beyond their comfort zones. Over time, that kind of engagement brings users up to a competitive level of employability.

Launching VjobReady represented a big change for Career Services of Brockville. The story of how that change was managed, and how VjobReady came to be, is detailed in this case study.



Preparing for Change

When Cynthia Sparring assumed the role of executive director in 2018, that in and of itself represented a big change for Career Services of Brockville. The former ED had been in the role for over 40 years. Sparring was prepared to face that challenge head-on, and she came in with a mission to motivate her staff to embrace change. Career Services saw the need for strategic foresight to re-imagine its relationship with its participants, and the surrounding community.

Sparring challenged her staff to consider: What are we doing? Why are we doing it? What can or should be changed so we can do better? Sparring admits that she came into the role of ED with “guns blazing,” and that her staff didn’t always agree with her ideas. However, they trusted her change-management style, and that made the process of introducing change easier.

As Career Services had been working hard for nearly a decade to facilitate community employment for people who have a disability, Sparring’s foremost goal was to introduce changes that would enhance pre-employment training, and job readiness.

Sparring says that she prepared to introduce change to Career Services of Brockville by looking for opportunities within the organization. She desired to bring meaningful change to the organization, and developing a meaningful change plan meant considering: What is the mission of our organization? What resources are at our disposal to fulfill that mission? What are the constraints on our organization that influence service delivery? At the nexus of those things, she found inspiration and opportunity in the form of VR technology.



Analyzing Change

If there is a phrase to describe Sparring’s change-management style, it is “Spend the money, and spend the time.” When you identify an opportunity for change, you must invest in it, for it to be meaningful, and lasting. Sparring was aware of some VR technology on the market that showed potential to be used in employment services. Career Services had experimented with Avail®, for example. Though it wasn’t the right fit for the organization, it showed promise.

But promise is not perfection, and before buying into the idea of using VR in employment services wholesale, Career Services needed to analyze its potential. One of the benefits of taking on Change That Is Desired is that time is on your side. There is no external force demanding the change be made swiftly.

On the tech side of things, to prepare for VjobReady, the organization invested \$60,000 to trial different VR technologies, and do research on VR. They needed empirical evidence to see whether VR technology was a good fit for employment services. When trialing the technology and taking into account risk mitigation, Career Services found that lots of groups of people who have a disability benefited from the safe, and adaptable nature of the technology. Career Services also partnered with a Queen’s University brain scientist to do a feasibility study on using VR technology to support people who have a developmental disability.

On the change management side of things, Career Services hired external consultants to work with their board, and all the staff. With the support of the consultants, the organization developed an ambitious strategic plan that had three pillars, and eighteen specific goals, among which was the development and launch of VjobReady. In Sparring’s words, their strategic plan was first a matter of catching up to the times, and then getting ahead.

On the stakeholder side of things, Career Services engaged with local businesses and employees to determine the areas in which people who have a disability need the most employment support. When they discovered that customer service and point-of-sale skills needed a boost, Career Services knew where their initial VR training should focus.



Establishing Consensus

Some people are more comfortable with change than others. That is a fact. And some people respond better to one change-management style over another. Sparring acknowledges that her change-management style is ambitious; and that she expects her staff to come along for the ride. However, that doesn't mean she is insensitive to their needs and perspectives.

She suggests that change leaders learn to identify lenses. They should ask themselves: Where are the people on my team coming from? Do they have a financial perspective? An ethical perspective? An administrative/practical perspective? A creative perspective? These perspectives need to be taken into account when creating a change plan, and when establishing consensus and buy-in among your team.

Sparring realized it was important to build change slowly; to remain consistent; and to check-in so that the team could trust the process and feel included. Her approach was that she didn't want to overwhelm her staff and stakeholders with change; but she also knew she had to be strict enough to break people out of their comfort zones, and to reinforce the changes taking place.

One of the ways she worked to establish consensus among her team was by identifying the innovators, early adopters, and those slower to change within the organization. It was a matter of figuring out who falls where, and how to make everyone comfortable with and able to tackle the changes taking place. Sparring made a point of checking in with her team throughout the change process, and asking, "What do you need me to know? What am I missing? Tell me what I can do."

In cases where she found her team still struggling to embrace change, she encouraged them to always go back to the strategic plan. In fact, she asks that everyone keeps a copy of the plan in their office. This, she says, means everyone has a guiding document to always keep Career Services moving forward as an organization. Career Service's motto is "We're in business for the community." With this motto in mind, Sparring asks her staff, "Where in your job are you living out our mission?" This, she believes, helps drive change within the organization.



Communicating Change

Sparring recognized that initially, communication among teams within Career Services happened more organically. She saw the need for more structure in communication and information-sharing, especially between teams. There was the business side to consider, the administrative side, the client side, and the employment side; and it seemed everyone was working in silos. A communication network was what the team needed.

Rather than management communicating change from the top down, Sparring recognized that communication and information-sharing had to be a shared responsibility among the team. The work of one team cross-pollinates with another; because of this, everyone needs to be respected and kept in the loop.

Each team within the organization had a role in making VjobReady a reality. Open communication among staff was integral to ensuring that everyone understood their role, and that they understood the changes taking place.



Activating Change

Staff at Career Services are fans of SMART goals (Specific, Measurable, Attainable, Relevant, and Timely). They appreciated structured plans laid out in a way that feels doable. This works well with Sparring's "just do it" attitude when it comes to change. Do it smart, yes, but get it done.

Career Services' approach to activating change is:

- Get inspired
- Present your idea to relevant stakeholders
- Find the time, money, and other resources you need to make your idea a reality
- Do your homework, consult research, and collect data and feedback
- Hire an external consultant who can help you see things at a high level, and engage with them to develop a robust and realistic strategic plan
- Communicate with stakeholders throughout the process
- Give the change plan and the team helming it room to breathe, but keep on top of it.
- Stay the course, and don't abandon the plan if there are speed bumps. Have faith in the plan, and in your team.



Measuring Impact

Because Career Services invested in research early on in the change plan for VjobReady, they knew that collecting data and measuring the impact of the technology once it was launched was important. Not enough research and data exist on outcomes in human services. Therefore, data collection and impact measurement are important not only to stakeholders within the organization, but to everyone in the sector who can benefit from what a specific organization learned through their experiences.

Before launching VjobReady, Career Services spent a year developing a database to track data from the initiative. Human-Services are an art and a science. They require good instincts, people skills, and experience; but they also require data to validate those human processes within an organization. The beauty of collecting data from an initiative that relies heavily on technology is that the technology itself is capable of tracking some of the data.

At the time of writing, VjobReady is just now poised to launch. Career Services can't yet report on the impact of this program on stakeholders. But one thing Sparring can say as her team approaches the end of this change process is that she doesn't like the phrase "continuous improvement." She says that makes it seem like things are never good enough. She suggests taking what's good and celebrating it. And once you've had time to appreciate your accomplishments, then take what needs work and turn it into a learning opportunity.

Case Study 3



Change That Is **REQUIRED**

When the Ontario government announced in 2015 the gradual closure of sheltered workshops and an end to segregated employment for people who have a disability — effective in 2019 — the Ottawa-Carleton Association for Persons with Developmental Disabilities (OCAPDD) knew this was a long time coming.³⁴

The process of transitioning the people they support out of segregated employment and into full community employment was already under way at OCAPDD when the Ministry of Children, Community and Social Services (MCCSS) announced its intention to mandate the closure of sheltered workshops. In fact, OCAPDD had already transitioned most of its clients who have a disability out of sheltered workshops, and into recreation and leisure programs. But a community-based employment program remained elusive.

Following the announcement in 2015 that effective immediately, no new persons could be placed into segregated employment, and that effective in 2019 all existing sheltered workshops must be closed, the Ontario government introduced Bill 148. Among other things, Bill 148 required equal pay for equal work for all Ontarians, including those who have a disability. This bill became the Fair Wages, Better Workplaces Act, and came into effect in November 2017.³⁵ This meant that the transition away from sheltered workshops to community employment was now a required change for OCAPDD, and other developmental services (DS) organizations across Ontario.

Around the same time, MCCSS launched its Employment and Modernization Fund (EMF) to help DS organizations throughout the province improve their employment services to Ontarians who have a disability. OCAPDD was successful in obtaining funding from this initiative. This made it feasible to make the required changes within the organization to end all employment that did not pay at least minimum wage. It also made it possible to fulfill OCAPDD's goal of further developing their existing employment services program into something more robust.



Preparing for Change

Judy Bernstein, Director of Supports and Services for OCAPDD, wanted to make one thing clear when discussing the changes OCAPDD underwent in response to the Ministry's requirement to close sheltered workshops. "You have to take your time and engage all stakeholders. If somebody is left behind, it hinders the progress." She also emphasized how important it is to consider the demographics of stakeholders. A one-size-fits-all approach to change wouldn't suit the people OCAPDD serves.

Having already transitioned most people who have a disability from sheltered workshops to recreation and leisure programs, OCAPDD was well on its way to fulfilling a long-desired goal of community employment for the people it serves. But it was the Ministry's announcement that sheltered workshops were to officially close, and the passage of Bill 148 that gave OCAPDD the external pressure it needed to complete the process.

Rather than resist the impending required changes, Bernstein felt, "External pressure made things easier." Rather than thinking of these changes as an imposition, Bernstein and OCAPDD decided to look at them as an opportunity. When preparing to tackle this change, Bernstein identified three ingredients needed to complete the transition from segregated work to a community-based employment program: motivation from the Ministry, buy-in from staff within the organization, and funding to facilitate the change.

The motivation from the Ministry was there. Soon after, OCAPDD secured funding to transition their services. Now it was just a matter of getting stakeholders of the organization onside with the changes.



Analyzing Change

Change worth doing is worth doing right. Before she could convince her staff of the validity of undergoing a major change to services, Bernstein needed to ensure that she and OCAPDD understood the best way to approach their change journey.

She explained that when you're going to start a big change, it's nice to have some outsiders with fresh perspectives to advise on the change process. Not only do you need specific expertise to validate the process, but you need to reassure your stakeholders that the changes coming are not just the whims of management being "a pain in the butt." Change needs to be a carefully considered journey, with people invested in its outcomes. You need a community of people helping you to understand the need for change, and how best to approach it.

In the early stages of the change process, OCAPDD engaged with Helen Sanderson Associates (HSA) Canada. HSA Canada is a training and consultancy firm dedicated to working with organizations, to develop person-centred supports. OCAPDD also worked with ODEN and received feedback, support and training on what is needed to develop and run a successful employment program for people who have a disability. Using funding from the EMF, OCAPDD was also able to hire two full time staff members to help with the transition to community employment.



Establishing Consensus

Bernstein knew that establishing consensus among OCAPDD stakeholders about the impending changes would be challenging. From staff who had worked in developmental services for years; to people being supported, to their families, to employers; OCAPDD had a lot of people to convince about the changes that were underway.

Communication throughout the change process was key, and Bernstein approached this several ways. First, communication with stakeholders through OCAPDD's newsletters kept everyone in the

loop and regularly updated about the changes taking place at OCAPPD. Bernstein noticed that people being supported by OCAPDD were earlier to embrace the changes underway than were some of their family members, and the staff at OCAPPD. The shift to community employment was going to have the biggest effect on their lives, but still others were more resistant to the changes.

Bernstein used an existing presentation, developed by a colleague for staff titled *The Purpose of our Work*, which outlined the history of social services organizations, and highlighted the evolution of services over time. She felt it was important to remind her staff what their purpose was as a developmental services organization, and to highlight for them the value of continuous improvement and modernization.

Bernstein also relied on support from outside of the organization, such as that received from HSA Canada and ODEN, to educate stakeholders on the purpose and value of the changes taking place; and to prepare them for the new status quo.

Finally, Bernstein also engaged in one-on-one conversations with each supported person affected by these changes. This information was then presented to her staff. At the same time staff were given the opportunity to express their concerns. She says she was sensitive to the feelings of her staff, and mindful of the impact of change on stakeholders, but that she did not cater to the fear. She chose to embrace the changes at hand and forged ahead, encouraging staff and stakeholders to trust the process, and come along for the ride.



Communicating Change

Communicating change, and establishing consensus among staff and with certain stakeholders, was challenging enough. But when it came to communicating change to the most important stakeholders in the equation, people who have a disability, Bernstein recognized that OCAPDD needed to be especially mindful of this part of the process. As she explained, the people OCAPDD serves have an unfortunate history of being under the control of others. Many people who have a disability are used to their lives being dictated by the institutions that serve them. Bernstein needed to find a way to communicate the impending changes to these stakeholders in a way that they felt comfortable to speak their truth, and to stand up for their needs.

When it came to communicating changes to stakeholders who have a disability, OCAPDD included self-advocacy in its message. Bernstein ensured that the consultants she hired took the time to liaise with people being served and their families. This was so OCAPPD could understand and incorporate their needs and wants into the new employment services plan. As important as it was for OCAPPD to communicate and be transparent about the changes taking place within the organization, it was equally important that people being served felt able to share their true thoughts and feelings on the changes at hand. This meant an education in self-advocacy, and support in learning how to communicate their needs independently, and free from fear of recrimination.

Throughout the process of transitioning to community employment, OCAPDD sent regular emails to stakeholders; held information sessions; and provided updates to its employees, the people it serves and their families, the board of directors, and the Ministry. Bernstein also highlighted that one of the best ways to communicate change is not through words, but through demonstration. OCAPDD held an official opening of their new employment services centre, and Bernstein feels that showing off the physical metamorphosis of the former day-program-site-turned-employment-centre had a positive effect on the mindset of stakeholders. The shift from a drab, institutional-looking space to a modern, inclusive environment visually communicated to stakeholders the significance of the changes taking place.



Activating Change

The challenge of carrying out change that is required is that you must do it, but the path forward to accomplishing it is sometimes unclear. The Ministry gave the directive that informed the changes taking place at OCAPDD, the EMF provided the financial resources and the structure to carrying out the change process. The process of applying for EMF funding pushed OCAPDD to establish specific objectives and outcomes. The application process gave clear purpose and structure to the changes being made at OCAPDD, and earning the funding furnished the framework and resources to carry out the mission.

Still, carrying out the change was not always easy. Bernstein admits that there was a lot of trial and error going through the process of change. She explains that she and her team used their experience and instincts to develop their change plan, but thinks a change-management process template or guidebook such as this one would have been helpful. There were times when aspects of the EMF project had to be dismantled; however, OCAPDD didn't have a lot of time for reflection. They needed to capitalize on their momentum. As important as communication was to OCAPDD at the beginning of their change process, Bernstein notes that at a certain point you have stop talking about doing the work, and actually just do the work.

Recruiting two staff members to devote themselves exclusively to the EMF project and establishing OCAPDD's employment services program, helped in this regard. As for how she chose who to move into these roles, Bernstein chose people from within the organization who were well-liked, but "not political". They were person-directed in their thinking, and they embraced the concept of change. OCAPDD helped these people grow in their roles through coaching and teaching. With their newly acquired expertise, they were able to complete many individual, person-directed plans for the new employment services program.

When it comes to carrying out major change initiatives, Bernstein notes that it's all about creativity, and capitalizing on resources. She says that it's important for an organization to consider what resources it has, and for the organization to ask "How can I use what I already have (e.g., Can anything be repurposed)?" and "What additional resources do I need?". From there, Bernstein says, it's about finding opportunities and efficiencies.



Measuring Impact

When it came to measuring the impact of the changes taking place, Bernstein credits the EMF for guiding a lot of this. Having to be accountable to funders was a motivating factor for staying on top of impact measurement. OCAPDD tracked outcomes and impact through monthly reports on the EMF project itself, individual employment plans, and reporting on employment outcomes. Bernstein explains that "When I looked back on the reported outcomes, I saw the progress. It was a good feeling, and a helpful indicator of how to forge ahead."

Since completing its EMF project, OCAPDD has continued to monitor things like who is employed; who is making minimum wage; who has achieved higher wages; and what types of jobs people are securing. Monitoring these outcomes ensures that OCAPDD is keeping its finger on the pulse of the sector, and that it can continue to refine services to continually generate better outcomes.

Though the transition from a segregated to a community employment program is complete, and the EMF funding has ended, when asked how OCAPDD concluded its change process Bernstein replied, "There isn't an end." She explains that you wrap up certain processes, and hit certain benchmarks. But if you are committed to providing the best services you can, then change never ends. It is a cycle of continuous improvement. OCAPDD's current focus is on building and strengthening relationships within the organization, and throughout the community to achieve better outcomes for all.

Case Study 4



Change That Is **COMPELLED**

When Life Directions Employment Supports first understood the long-term impact that the COVID-19 pandemic would have on all of us, they foresaw an inevitable change coming — a *digital transformation* they would need to undertake to serve their clients better. This proved to be a change that was not only compelled but also desired.

Digital transformation has been defined as the “process of adopting and implementing *digital technology* to create new or modify existing services and operations by the means of translating business processes into a *digital format*.”³⁶ For small organizations, the idea of undergoing a digital transformation can be a challenging proposition as their capacities (organizational, HR, technical) are often limited. Often, these organizations focus on day-to-day operations such as administrative duties and direct service delivery. For some, a digital transformation would mean significantly changing how they have been operating, which might seem too overwhelming. Life Directions, a small, rural employment service provider located in South-East Grey County, has managed their digital transformation well thanks to their understanding that the right mindset, tools, and skills were all critical elements to success.

Life Directions has a long history in the community and has been through several significant changes in the last decade; a journey to operating as a *high-performing agency* providing comprehensive employment services to their rural community. While the team has implemented different initiatives and strategies for the number of transformations they have experienced, they have maintained one fundamental soft skill throughout the process—**resiliency**. Resiliency has proven to be a positive driver for change for this employment service provider because it has helped the team embrace and be ready for change.



Preparing for Change

Like many employment service providers operating in *rural* communities, Life Directions started as a small agency with limited resources and capacity. Over the last decade, Life Directions has significantly grown from one staff person to a team of six. The COVID-19 pandemic made it clear to the team that they needed to embrace delivering services online, and this was the catalyst to start a digital transformation for all aspects of their operation.

While a digital transformation is a change in itself, it can also be seen as a way to process and adapt to larger organizational change. For Life Directions, the digital transformation was a tool to navigate the many changes due to the pandemic. The digital transformation was a “Change That Is Compelled”. But as they were implementing more digital technology, this transformation also became “Change That Is Desired” as Life Directions recognized the need for a digital format for their business to improve their organizational efficiency—the digital transformation allowed them to diversify their service delivery models, enhance their intake procedures, and streamline their documentation and reporting processes.

Employment Coordinator, Cristin O’Sullivan, has been a key person through all the changes and transformations in Life Directions; during the interviews to create this case study, she shared with ODEN the hardships as well as the excitement that going through the process of transformation brought to her and her team. As someone who never *received formal project management and administration training*, Cristin experienced *imposter syndrome* as these organizational changes took place. However, she acknowledged that one key **soft skill** has helped her to navigate these transformations—**resiliency**.

Resiliency has proven to be a positive driver for change for this employment service provider because it has helped the team embrace and be ready for change. For Ms. O’Sullivan, resiliency keeps her spirit of “learning and doing” well as the change takes place. When she had to manage the first steps of organizational transformation, Ms. O’Sullivan was worried about whether and how she would do the job. However, she did not give up despite all the worries and uncertainty. Ms. O’Sullivan embraced her entrepreneurial spirit and learned a lot by navigating the changes through calculated “trial and error” ways.

Analyzing Change

Organizational change and the process of managing the change require a *change in mindset*—Life Directions was open to that. Ms. O’Sullivan established a solid foundation for digital transformation by first welcoming the change despite the uncertainty. She analyzed what this digital transformation would mean by envisioning the potential impacts and outcomes of the transformation. By asking questions like “*What advantages would this digital transformation bring to the clients we serve? How would this change impact the team? and, how would the change benefit the community at large?*” by evaluating these questions, Ms. O’Sullivan envisioned what would be the main priorities of the transformation.

Like many smaller organizations, Life Directions used Excel spreadsheets and paper documentation to operate their services before the pandemic. As the COVID-19 pandemic progressed, Life Directions realized the need for changes in its model of service delivery and documentation to continue serving the community and fulfill the physical distance requirements. They decided to develop an online portal on their website, which could be used for intake, documentation, and service delivery.

Although Ms. O’Sullivan took the lead for this digital transformation and envisioned how the transformation could benefit the organization and the people it serves, she acknowledged that she did not have the technical skills to build and maintain the online portal. This realization resulted in hiring a Digital Operation Specialist to streamline and manage the transformation.

Establishing Consensus

In smaller organizations, the process of establishing consensus can be more responsive and flexible as fewer stakeholders are involved in the process. Obtaining buy-in from everyone on the team is essential for the successful outcome of the change process.

For Life Directions, establishing consensus involved fostering a positive environment for the team and the community they serve. To the team, the process of establishing consensus for this digital transformation was tied to the process of building resiliency and nurturing an entrepreneurship spirit for everyone—that is, people were growing and developing their skills using a rationalized and measured “trial and error” process and supporting each other in the process. No team member or client was left behind.



Communicating Change

Part 2 of Re-Imagining Change mentions that being an effective changemaker takes time.³⁷ During the digital transformation, the team at Life Directions was patient and dedicated the time to planning and communicating the changes within the communities they worked in and their stakeholders. These stakeholders included staff, clients and their families, and the businesses Life Directions worked with when placing jobseekers.

As they were changing to more digital communications, Life Directions realized that their website needed changes to make the content, and their services, more accessible. Rather than shy away from the challenge, they leaned on their local network and social media platforms to continue outreach and engagement activities while working on their website. They acknowledged that the digital transformation would take time and that skills missing in the team needed to be brought in-house. They willingly communicated with all stakeholders about these challenges to confirm that their services would still be available despite the transformation. They communicated step-by-step through the transformation and continued to support their communities while working through the change.

Through and because of this digital transformation, Life Directions developed a strong online presence within local business networks, enhancing their business engagement skills. They were proactive and communicated fully to the business community; they wanted the process to be smooth for the employers they worked with, making sure that they could still reach jobseekers when in-person businesses were “restricted”. This open communication enhanced the relationships with these businesses—Life Directions remained responsive to their needs.



Activating Change

Hiring a Digital Operation Specialist for the digital transformation was critical for the work that Life Directions was embarking. The Digital Operation Specialist successfully built an online portal that clients were able to access easily. This online portal has become an integral part of Life Directions’ operation. Clients can log into the portal and register to access services; the online portal has given them a level of autonomy. The online portal has also enhanced the intake process and reduced administrative work as most information is stored online rather than on “someone’s desk”. Instead of duplicating files and reports for different funding sources, every piece of information can be easily accessed online. Such digital transformation enhanced Life Directions’ organizational efficiency, especially its administrative operation.

With a digital presence, they could accommodate program participants during the COVID-19 pandemic; for example, they offered programs such as the award-winning jobPath workshop, a curriculum-based employment services module, in a virtual setting. With this virtual change in the service delivery model, Life Directions accessed clients who experience physical or mobility barriers—a population that has not been reached in the past. The change increased the accessibility of their services to many in the community.



Measuring Change

The successful digital transformation continues to serve the organization more so during Ontario's Employment Service Transformation. The online portal provides Life Direction with a better storage and filing system to prevent duplication and confusion. Life Directions can focus on addressing all the additional changes expected as a result of the Employment Service Transformation.

To date, Life Directions staff have served more than 100 clients from the community with over 90% of the jobseekers reporting enhanced employability skills and over 70% successfully obtaining employment. In addition, they have also connected to more than 72 businesses as part of their enhanced social media business engagement. Although there is no way to determine a direct relationship between the digital transformation and Life Directions' program outcomes, the digital transformation has certainly enhanced their organizational capacity, positively impacting their program and service delivery and employment outcomes.

The case study for Life Directions Employment Supports shows that positive results happen when change is managed and planned well along the way. Even when an organization has limited resources because of funding, location (rural vs urban), or minimal human capital, taking your time to prepare, analyze, and communicate the change could result in effective and sustainable organizational outcomes.

This case study has captured Life Directions' digital transformation as a result of the COVID-19 pandemic. Review other aspects of the organizational change that Life Directions Employment Supports has experienced in the last decade. Visit "ODEN Case Studies Compilation" at odenetwork.com for a longer version of the case study.

Case Study 5



Change That Is **COMPELLED**

KW Habilitation is a developmental services (DS) organization serving Kitchener-Waterloo, and surrounding communities. Their portfolio of services includes Community and Employment Supports, Inclusive Housing and Affordable Housing, and Early Learning Child and Family Resources for children who have a disability in licensed childcare programs. When the COVID-19 pandemic arrived in Ontario in March 2020, DS organizations across the province were forced to quickly adapt their methods of service delivery to ensure minimal disruption to the lives of the people they support.

Like most organizations during the earliest days of the pandemic, KW Habilitation was initially focused on how best to manage “for now”. However, soon it became clear that the pandemic was going to be longer and harder to manage than originally thought. It was then that KW Habilitation began developing a multifaceted approach to service delivery, one that prioritized continuation of services, service quality, mental health, and physical safety. After nearly two years of providing services during the pandemic, Ontario Disability Employment Network (ODEN) spoke to KW Habilitation about how they developed their COVID-19 service strategy, and about how that strategy evolved as circumstances and needs dictated



Preparing for Change

When COVID-19 first impacted Ontario, outcomes were uncertain, but directives were clear: Where and however possible, limit physical contact among people. With no precedent or provincial plan yet in place, individuals, employers, institutions, and organizations had to determine for themselves what that looked like. KW Habilitation was determined to embrace a positive mindset and maintain connections with their community, while promoting safety and reducing fear around the pandemic.

People living in inclusive housing through KW Habilitation remained in their homes, but were required to follow strict COVID-19 safety protocols, as mandated by MCCSS and Public Health. Protocols included but were not limited to the use of personal protective equipment (PPE), limiting visitors to the residences, and being strategic about which staff and residents were out in the community

to do practical business such as grocery shopping. Like all people being supported by KW Habilitation, those in inclusive housing were educated about additional safety measures such as frequent hand washing and physical distancing, so that they could work to protect themselves.

Analyzing Change

In terms of some of KW Habilitation's offerings, programs such as community inclusion activities, independent living, cooking and baking, and tutoring were temporarily suspended to reduce physical contact between members of their community. In the short-term, KW Habilitation knew that protecting the safety of staff and people supported was more important than gathering in-person. They could not offer these programs traditionally, and they had not yet developed ways of delivering them alternatively. That would come later.

While people being supported could do temporarily without the specific curriculum and activities included in KW Habilitation's day programs, they could not do without the connection and sense of community that attending these programs provides. Following the mandated suspension of traditional day programs, the agency needed to figure out how to keep people connected to KW Habilitation. The purpose of this was two-fold. First, KW Habilitation knew their day programs were important to the lives of the people they support. Should they become disengaged with the organization, they may not resume attending programming when it was feasible to do so. Second and more importantly, KW Habilitation knew that maintaining mental health would be key to enduring the pandemic. KW Habilitation worked to ensure that people receiving services remained connected to the community, even if they were not being supported in traditional ways. This was accomplished through regular engagement via phone calls and wellness checks to people being supported and their families.

People receiving services were offered opportunities to meet online for social connection, and for things like mindfulness exercises and wellness check-ins. Initially a stopgap measure, these online gatherings were a precursor of what was to become a cornerstone of pandemic programs—resuming services by delivering them virtually. But in the earliest days of the pandemic, KW Habilitation was just beginning to explore the possibilities technology held for the organization. Even then, they recognized that virtual connection can only accomplish so much.

Things like virtual affirmations and mindfulness apps were important, but so were food deliveries, and physically distanced visits from KW Habilitation staff with treats and words of encouragement. KW Habilitation saw these various forms of checking in as ways of reassuring the community that, "We're still here. We've got your back." Their outlook was that they were working as a community to protect and support each other, even if things looked different than they once were. People being supported and KW Habilitation staff alike needed to feel appreciated. They needed to have some routine and purpose, and to not be left behind.

Establishing Consensus

Planning around a pandemic was not easy. With provincial guidelines changing seemingly from week to week, it was difficult to know what could be done, and how it should be done. Physical safety and mental health remained priorities for KW Habilitation throughout the pandemic. However, as the pandemic dragged on continuation of services and service quality needed to be prioritized as well. No one could predict how long the pandemic would continue, and KW Habilitation community members could no longer be left in limbo. They needed to resume typical activities, even if that meant resuming them in non-traditional ways.

It soon became clear that technology was going to play a large role in services delivered during the pandemic. Therefore, it was essential that people receiving services had access to the required technology. Some people receiving services had tablets and smartphones of their own which they

could use to access services. Others needed assistance acquiring such devices. KW Habilitation received a small stock of tablets through Autism Speaks' Samsung Tablet Program, which they were able to lend to people who needed them. Some people receiving services had Passport Funding, which they could apply to purchasing technology. Those in inclusive housing were able to share technology when it was in short supply, as they lived in a pandemic "bubble" which allowed them to safely share resources. The sharing of resources among those in inclusive housing encouraged socialization and shared learning, a positive outcome from a difficult situation.

In addition to reducing barriers to acquiring technology, KW Habilitation worked to reduce barriers to using technology. In cases where internet was unreliable or unaffordable, staff made sure that their clients' devices had data built in, so internet access was not a barrier. Sessions in tech use and digital literacy were developed to support people using technology. Operating devices, navigating video conferencing platforms, and learning cyber safety and virtual etiquette were among the most essential skills practiced.

Some anxiety and intimidation existed initially about using technology to provide services. Staff wondered if they had the knowledge and capacity to use it properly. They worried over whether tech was accessible and safe for people receiving services. KW Habilitation struggled to imagine what predominantly tech-based programs would look like, and they wondered whether it could reasonably facilitate the types of services they offer.



Communicating Change

Before long, KW Habilitation staff observed that some programs were well-suited to virtual learning and learning from home. For example, aspects of their independent living programs such as their cooking and baking programs ran more smoothly when people receiving services were learning and practicing these skills in their home environments. The added step of transferring skills learned on-site at KW Habilitation to their home environment was eliminated. Without the benefit of in-person support, participants had to troubleshoot on their own, thus increasing their capacity for independence and problem-solving.

Although there was a learning curve navigating virtual platforms to access services, even this was as much a boon as a barrier. Receiving services virtually required participants to increase their digital literacy. KW Habilitation had been working to increase the organization's tech capacity prior to the pandemic. They were valued partners on a tech-focused pilot project leading up to the pandemic. The pandemic reinforced the learnings from that project, and further motivated staff to increase their tech skills to provide the most relevant, accessible services.



Activating Change

Employment services were among the most challenging to navigate throughout the pandemic. The changing world of work due to the pandemic meant that both the service delivery method and the content of employment services needed to evolve. During this time, employment and related services meant different things to different people. For some people receiving services, they needed support to continue doing their jobs safely with respect to emerging COVID safety protocols. For others, they needed support securing employment insurance (EI) to have a financial safety net when it did not feel safe, or it was not possible for them to continue working under COVID. For those preparing to enter the workforce, they accessed employment programs such as LEG Up!, an employment and skill-building program for people who have a developmental disability, and KW Career Compass, a portfolio of employment services for people who experience barriers to employment, including LEG Up! To Work—virtually.

As the pandemic wore on, how these services were offered evolved. For example, LEG Up! started out as a binder-based curriculum from which KW Habilitation staff would develop their lessons.

Prior to COVID, LEG Up! was run as an in-class workshop, with a facilitator and 6-10 people. It was a two-hour class. When switched to online, the class was offered in one-hour virtual sessions with one facilitator and up to 15 people.

The journey from in-person to classes to virtually facilitated sessions began with translating the curriculum into PowerPoint slides that could be shared over a virtual meeting platform. Over time, instructors saw an opportunity to create a more professional, engaging set of resources to deliver their employment programs. They began using the graphic design platform Canva to support their training.

Using technology to support virtual offerings also meant that KW Habilitation could open the program to participants outside the Waterloo Region, with hundreds of people registering to access them. For example, when LEG Up! ran in July 2020, KW Habilitation had 141 registrations. In the same month in 2021, the agency had 358 registrations. Comparing the registrations overall for the years 2020 and 2021, in 2020 there were 926 registrations for LEG Up! programs. By contrast, there were 1362 registrations in 2021. This shift has meant a need to build capacity, resulting in KW Habilitation hiring one additional full-time member to their thriving LEG Up! program. The LEG Up! team is now three people strong.

Measuring Impact

As their virtual programs evolved, service providers noticed some additional benefits to virtual service delivery. People receiving services had different levels of experience and comfort with technology, and those who were more comfortable with the technology would offer peer support to others navigating the platforms. In this way, their employment programs became about more than just employment. They became spaces fostering digital literacy, peer mentorship, and increased independence.

Depending on the needs and goals of the person receiving services, sometimes 1:1 coaching and support was more appropriate. The loss of an in-person classroom setting for some was challenging, and the virtual platform was not always able to replicate the value they found when receiving services in-person. That said, this was a good reminder that the best services are person-centered. The social value of learning with one's peers is important, but so are services tailored to the individual interests, goals, and needs of a person. 1:1 phone or web meetings easily facilitated such person-centered services.

Overall, not only did technology allow KW Habilitation to maintain services for people who depended on them; it also allowed them to reach people outside the region. Technology provided an opportunity to build capacity to deliver quality services, such as onboarding additional staff to serve their growing list of participants.

One of the main takeaways from this challenging journey providing employment services is that constant and continuous employment is not the only goal. The value of work includes having an income, using one's skills and talents, experiencing independence, developing social relationships, and being a part of the community. KW Habilitation learned they could foster these experiences outside of traditional employment, and traditional employment programs. Specific, extenuating circumstances dictate whether preparing for work, securing employment, remaining employed, or temporarily opting out of employment are the best fits for the person receiving services. The unique situation created by COVID changed the way the world thinks of work, in many ways to the benefit of all current and prospective workers, regardless of ability.

The COVID-19 pandemic disrupted nearly every aspect of individual and community life. That said, these disruptions presented an opportunity for learning and evolving. Below is a list of some of the key learnings and takeaways from KW Habilitation's experience modifying services due to COVID-19:

- Consistent communication with people receiving services and staff is first and foremost. People need to know that they are being supported, and how they are being supported, no matter what.
- Honesty and transparency about processes are key. Navigating the pandemic was challenging for everyone. It was a learning process, and it involved trial and error. A "how can we..." attitude was instrumental for persevering and succeeding. Being open about the realities and challenges was important for community-building.
- Flexibility, patience, and grace are essential to quality service delivery. Even in non-pandemic times, providing and receiving social services can be challenging. Staff and people receiving services alike benefit from flexibility and compassion.
- Further, flexibility can foster creativity. Thinking outside of the box when providing services can create accessibility and opportunity.
- For example, the need to pivot to virtual services increased access and engagement for some people receiving services, such as those living in rural communities, or those experiencing transportation barriers.

Feelings of uncertainty, instability, or overwhelm do not just apply to COVID. Learning to deal with adversity, and to problem solve are essential skills for everyone involved in developmental services. These skills should be reinforced in the sector.

Case Study 6



Change That Is **COMPELLED**

When the COVID-19 pandemic hit in March 2020, the staff of Community Living Essex County (CLEC) first reacted the way you might expect: with fear and uncertainty. Fear about the dangers of the pandemic itself, and uncertainty about the changes inevitably wrought on developmental services because of the pandemic. Change that is compelled has this effect on people, particularly when the thing compelling change is unprecedented and potentially dangerous.

But in the spirit of making lemonade out of lemons, CLEC realized that as hard as it was for the organization and the people it serves to weather the service disruptions of the pandemic, it also presented an opportunity to rethink the way CLEC delivers its services. The pace in developmental services is fast. There is little downtime to devote to innovation, or contemplate next steps. But when COVID-19 necessitated modification of some services, and a temporary cessation of others, Executive Director Karen Bolger and Director of Community Living Operations Corey Dalglish identified an opportunity.

CLEC had been working on a plan to restructure the organization around this question: How can we create a service model that is more responsive to the individual needs of people who have a disability? Before such a major reorganization of services might have been too time-consuming, and too disruptive to services already underway. But the unique circumstances of the pandemic provided a window of time and opportunity to drive change.

CLEC first had to figure out how it was going to modify the services it could still deliver in ways that were safe and respecting of COVID-19 guidelines. Next, it had to determine what the remainder of its services would look like when full operations could resume.

In discussing CLEC's approach to change management during the pandemic, Corey Dalglish realized that CLEC's two major strengths as an organization are that they are not afraid of change, and that they are good at putting ego aside. As Dalglish sees it, CLEC is skilled at providing the structure and finding the resources to create change. But CLEC knows that they must use their capacity for change to serve the interests of a whole range of stakeholders, partners, and perspectives. This attitude has made it possible for CLEC to turn a compelled change into a learning and growing opportunity.



Preparing for Change

The thing about Change that is Compelled is that you can't prepare for it, not really. CLEC had a pandemic planning policy already in place. But the likelihood of ever relying on that policy seemed so remote that no one really considered what that might look like in practice. Compared to Change that is Desired and Change that is Required, the preparation stage for Change that is Compelled looks very different.

When the first COVID-19 related lockdown began in March of 2020, Dalglish says that CLEC immediately went into crisis-management mode. Senior leadership banded together with union representatives to create an emergency response that best protected employee safety and the safety of people supported, while considering what it would take for the organization to survive the crisis. Within a week or so of its initial closure, CLEC put together a Pandemic Planning Response Team; established a Support Continuity Working Group; and developed a strong relationship with their local health unit to advise them on best practices for health and safety.

With neither a precedent nor a manual for how to deal with this challenging new reality, CLEC decided they needed to develop some guiding principles to navigate the ever-changing tides of the pandemic. They prioritized the safety of staff and people receiving services first and foremost, followed by the continuity of residential services. Clear and open communication with stakeholders about the realities and effects of the pandemic on services was also paramount. Realistically, employment services were a low priority in the early days of the pandemic. Many workplaces were closed; and mass temporary unemployment was the reality for many Ontarians, not just those who have a disability.

Dalglish has half a decade of change-management experience under his belt, and he did his best to apply the principles he knew that work well, to CLEC's pandemic response. He admits, however, that due to the unpredictable and ever-changing nature of the pandemic, there was a lot of responding and adapting on the fly in the early days of COVID-19.



Analyzing Change

Since COVID-19 demanded that traditional services halt and changes be made, CLEC used this as an opportunity to reflect on and analyze what kinds of changes would best serve the organization in the long-run. CLEC began considering: What is our current capacity? How can we expand our capacity? What do we need as an organization to survive now, and thrive later? What do the people we support need from us to get through this, and how can we make up for lost time when all of this is over? What resources do we currently have to serve our stakeholders? How do we equitably distribute the base budget to give people the services they need and want? What other revenue streams are available to support us in retailoring our services to be more individualized and responsive to stakeholder needs in the future?

CLEC has been on a trajectory of change for years. Identifying the organization's vulnerabilities; and figuring out how to make it and the services it provides stronger, more adaptable and more responsive to people's needs, in some ways felt like a natural next step. Undoubtedly, the stoppage of some services has been hard for the people CLEC supports. That is why CLEC has been particularly keen to brainstorm ways to develop new and better services. Whatever losses have been incurred due to the temporary of closure of services, CLEC is determined will be made up in gains made by developing a better model of service delivery post-pandemic.³⁸



Establishing Consensus

If there is a silver lining to something like COVID-19, it is that it teaches you how resilient you are, and it prepares you to face challenges head on. Change can be overwhelming. But the pandemic has forced change on such a large scale that the prospect of change is becoming, if not more comfortable, at least more natural.

Next to “social distancing,” “the new normal” has got to be one of the most-uttered phrases of the pandemic. In its early days, people were desperate for the pandemic to end, and to return to “normal.” But as the pandemic has dragged on, it has highlighted how much of what we took to be “normal” as being outdated and ineffective. COVID-19 has underscored that the status quo is simply the ways things have traditionally been done; not necessarily the best way of doing things.

Dalgleish understands that after nearly two years of life in upheaval, some people are craving the familiar, the comfortable. He understands there will be people who will resist the new model of service delivery CLEC is developing. But come what may post-pandemic, CLEC is committed to evolving. And they are doing their utmost to invite staff and stakeholders on their journey of change.

In anticipation of the changes in store for the organization, CLEC has established relevant working groups. These have been engaged in discussions, training and consulting to prepare for the “new normal” ahead.



Communicating Change

Communicating to stakeholders throughout a major change is key. Never has this been more evident than when communicating changes that occur practically on a weekly basis. New information, changing statistics, access to vaccines and political persuasions have made responses to COVID unpredictable, and everchanging. What is deemed best or necessary to address the pandemic one day may be different another day. In some ways, this is why CLEC is heavily invested in providing the best possible services post-pandemic, rather than trying to continually reinvent the wheel and hobble along during the pandemic.

Of course, there is still work to be done and people to serve. So it is important to CLEC that they communicate both the immediate external changes wrought by COVID, and dictated by local health units and the provincial government. As well, CLC is communicating the longer-term internal changes inspired by the opportunities the pandemic has created.

CLEC’s pandemic planning response team, its senior leadership, and its management staff meet weekly – separately, but with concerted goals. The Pandemic Planning Response Team determines best practices for delivering services during that moment in the course of the pandemic, and the team makes recommendations to senior leadership. Senior leadership communicates with management, who then communicates with and guides staff to deploy whatever protocols are deemed best. The communications team is in constant contact with stakeholders and the public to keep them abreast of an ever-evolving pandemic response. It’s a continuous loop of communication, accountability, and feedback.



Activating Change

The way Dalgleish sees it, CLEC’s response to the pandemic has been two-tiered. First, it has been about making immediate changes to ensure that whatever services are able to continue do so, and with minimal disruption and maximum safety. For example, early on CLEC was able to shift its delivery of jobPath training to a virtual platform for the safety of participants. Second, it has been preparing for changes to service delivery post-pandemic. Interestingly, Dalgleish has noted that these two approaches to change have been complementary in many cases. For

example, some people who have a disability have found virtual services to be more accessible and/or beneficial. The shift to virtual services for reasons of immediate safety, then, has given rise to new ideas about improving service delivery in the longer term.

Since the outset of the pandemic, CLEC has been focused on creating an emergency plan that is responsive to the immediate requirements of the pandemic, but which is also sustainable post-pandemic. They have been keen to examine how the changes they have made during the pandemic might help them to innovate and build capacity moving forward.

As for how CLEC has gone about implementing the changes it has thought so carefully about, Dagleish has this advice: “If you want to do something innovative, you’ve got to actually do something different.” And doing something different means moving beyond your limited vision and comfort zone. The pandemic has forced CLEC and other organizations to do this. CLEC has continued to push themselves to innovate, and to think beyond the pandemic by looking for ideas outside of the DS sector. They’ve established working groups and steering committees — and they’ve hired consultants to help guide and execute their vision of offering, essentially, an a-la-carte menu of services for people who have a disability. Dagleish advises adopting an attitude of “How might we...” when attempting to solve problems and facilitate change.

During the Summer of 2020, CLEC started developing reopening plans. These plans have been revisited multiple times as the pandemic situation continues to be acute and fluid. But that hasn’t stopped the organization from pursuing their post-pandemic reopening goals. Recently they were awarded funding from the Ontario Trillium Foundation’s *Resilient Communities Fund* to help their organization shift from a congregate Community Participations Support setting, to an individualized, community inclusion approach. The shift has been made with an informed approach, using both tiers of CLEC’s pandemic change plan. Individualized services mean improved health and safety protocols for people being served, as services shift from having people crowded in congregate settings, to be integrated safely into their communities. It also means more relevant and person-centered services for people who have a disability.

Measuring Impact

With COVID still being an acute threat to our communities, it is impossible to measure the impact of COVID itself, and organizational responses to it. Organizations are still in the thick of their emergency response plans, and it will be years before experts can tease out and analyze the impacts of COVID-19 on the DS sector. CLEC is no exception. Specific to their longer-term goal of cultivating a menu of person-centered services for people who have a disability to choose from, the impacts of that remain to be seen. Until CLEC can reopen fully and engage people in these services, all the organization can do is have faith in their change plan, and hope that the work they’ve put in to developing it will yield positive outcomes. To date CLEC leadership has shared its vision with staff in the organization; hired an external consultant to evaluate and guide their change plan; engaged with families and people receiving services to shape their plan; and worked with a steering committee to keep themselves accountable.

Endnotes

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- ³ Adapted from de Jager, *Roadmap to Inclusion*, 72.
- ⁴ De Jager, *Roadmap to Inclusion*, 61.
- ⁵ SHRM, *Managing Organizational Change Toolkit*, <https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/managingorganizationalchange.aspx>.
- ⁷ Kerry Kuenzi, Amanda J. Stewart, and Marlene Walk, "COVID-19 as a Nonprofit Workplace Crisis: Seeking Insights from the Nonprofit Workers' Perspective," *Journal of Non-profit Management and Leadership* 34, no. 4 (2021).
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- ¹⁵ De Jager, *Roadmap to Inclusion*, 31.
- ¹⁶ Ibid.
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- ¹⁸ Tam Harbert, "How to Manage Change," *HR Magazine*, March 11, 2021, <https://www.shrm.org/hr-today/news/hr-magazine/spring2021/Pages/managing-change.aspx>
- ¹⁹ Ibid.
- ²⁰ Ibid.
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- ²³ Ibid.
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- ²⁵ TemplateLab, “Logic Model,” <https://templatelab.com/logic-model/>
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- ²⁷ De Jager, *Roadmap to Inclusion*, 41.
- ²⁸ De Jager, *Roadmap to Inclusion*, 17.
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- ³² Scotney D. Evans, Ora Prilleltensky, Adrine McKenzie, Isaac Prilleltensky, Debbie Nogueras, Corinne Huggins, and Nick Mescia, “Promoting Strengths, Prevention, Empowerment, and Community Change Through Organizational Development: Lessons for Research, Theory, and Practice,” *Journal of Prevention and Intervention Community* 39, no. 1 (2011): 50-64.
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Appendix A



ACTIVITY: Change Readiness Checklist

Think about a potential upcoming change within your organization and complete this Change Readiness Checklist.

If you answered mostly “yes” when filling out this checklist, you are ready to begin creating your plan for change, starting with a Theory of Change. See Section 2 to learn about what a Theory of Change is, and how to create one.

If you answered mostly “somewhat” when filling out this checklist, you need to do some more reflecting on the change you hope to make. Observe what is going on in your organization; chat with other members; and do some brainstorming about the direction the organization is heading. Then revisit this checklist.

If you answered mostly “no” when filling out this checklist, you are not ready to make a change. That’s okay! Change takes a great deal of time, energy, and resources. You shouldn’t attempt change until you are ready. Revisit this checklist when you’ve had more time to think about what kind of change might be in store for your organization.

See next page for full activity checklist →

NOTES:



Change Readiness Checklist

	Yes	Somewhat	No
Are you currently thinking about, or preparing to make a change to your organization?			
Do you have a specific change in mind?			
Have you identified which category of change (Desired, Required, Compelled) your change initiative belongs to?			
Does the proposed change serve a specific purpose/set of outcomes?			
Does the proposed change have buy-in from (at the very least) senior leadership?			
Have you identified the key resources necessary to make the proposed change?			
Does your organization have access to these resources?			
If you don't have sufficient resources currently, does your organization have a plan to acquire them?			
Does your organization have the human resources/talent necessary to carry out the proposed change?			
Does your organization have the time/bandwidth to devote to making the proposed change?			
Does your organization have a change-management system in place?			
Does your organization have a system for tracking change and recording outcomes?			



ACTIVITY: Categorizing Change Checklist

Consider the change you are about to make and answer the questions in the checklists.

The checklist with the greatest number of “yes” responses determines the category of change you are making. Your change may not perfectly align with one of these categories, but it should favour one category.

Determining which category your change falls into will help you to better understand the change you are about to make, and it will help you to determine the best steps to take to plan for and execute the change.

[See next page for full activity checklist](#) 

NOTES:



Categorizing Change Checklist

Change That Is Desired	Yes	No
The initial motivation for change is coming from within the organization		
The proposed change stems from an intrinsic desire to improve operations, and not from a requirement, or immediate need		
The organization feels mostly enthusiastic about the proposed change		
The organization feels a sense of ownership and control over the proposed change		
The change can made incrementally, or postponed until the timing is right for the organization		
If the proposed change does not occur, there will not be significant consequences for the organization		

Change That Is Required	Yes	No
The initial motivation for change is coming from outside the organization		
The proposed change stems from an external requirement, and not from an internal desire, or immediate need.		
The organization feels mostly neutral/resigned to the proposed change		
The organization feels the proposed change is somewhat out of their control/feels hesitant about it		
The change must be made in a timely fashion, per the instructions of whomever is requiring the change		
If the change does not occur, there will potentially be consequences for the organization		

Change That Is Compelled	Yes	No
This initial motivation for change is coming from outside the organization		
The proposed change stems from an immediate need, not from an intrinsic desire, or external requirement		
The organization feels mostly surprised by and unprepared for the proposed change		
The organization feels a loss of control over the proposed change		
The proposed change must be made immediately		
If the proposed change does not occur, there will be significant consequences for the organization		



ACTIVITY: Step 1 — Preparing for Change

As the saying goes, “preparation is the key to success.” Devote ample time to this phase of change, and you will find yourself with a well-oriented plan. Skip it, and you’ll find yourself lost. When beginning your theory of change, you should consider your organization’s mission and values, its goals, and its present needs. Change should be rooted in purpose. The following prompts will help you to take stock of where your organization stands, what its needs are, and where it is going.

Why am I considering making a change?

What is the organization’s mission? What are its core values?

Who are the organization’s key stakeholders?

What are the organization’s needs and goals?

Short-term?

Medium-term?

Long-term?

Brainstorm some changes that could be made to address these needs/goals.



ACTIVITY: Step 2 – Analyzing Change

Now that you’ve determined your organization’s foremost needs and goals, and you’ve identified some potential changes you can make to support those needs and goals, it’s good to survey the information and resources available to help you make informed decisions about change. Another term for “analysis” in this case is “survey.” You are responsible for surveying where your organization is, where the sector is, and where your proposed change fits within them. You’ll want to ensure that the inspiration that struck during the planning phase is well considered, and is examined from all angles, before proceeding with implementation. The following prompts will help you vet changes you are considering.

What evidence do I have that the change I am considering is necessary?

e.g., Internal data, stakeholder feedback

What evidence do I have that the change I am considering is effective?

e.g., External research, promising examples from partners in the sector

How are other organizations addressing similar issues?

Where can I find the evidence to make an informed decision? If not available, how can I gather data to inform the decision to make a change?

e.g., External research, conducting surveys



Step 2 – Analyzing Change (continued)

Is there a precedent of promising practices that I can apply to the problem I am trying to solve?
Or am I starting from square one?

What is the timeframe for completing this change?

What is the budget for carrying out this change?

Who should be involved in making this change?



ACTIVITY: Step 3 – Establishing Consensus

Once you have assessed the need for change, analyzed different ways of approaching that change, and vetted processes for making the change, it is time for the appropriate stakeholders (typically senior leadership and management) to reach a consensus on making that change. Consensus does not mean that everyone agrees on exactly how to implement change. Inevitably, people will bring different views to the table. It is good to consider alternative suggestions and feedback. Consensus means getting stakeholders to buy in and sign off on a chosen change plan. When you consider everything from the planning and analyzing stage, which plan makes the most sense, and has the most stakeholder support? That is the plan you should pursue. To achieve consensus, consider:

Who gets a say in determining the change plan?

e.g., Just senior leadership? Management too? What about stakeholders in the community?

How will we evaluate our change plan options?

e.g., Based on feasibility? Popularity? Using what metrics? If within budget, an external evaluator may be useful at this stage of planning.

How will we resolve disagreements about the change plan?

Who gets final say on the change plan?

How will we address the concerns of those who aren't on board with the change plan?

How will we encourage buy-in of the change plan once it has been determined?



ACTIVITY: Step 4 – Communicating Change

Once you have identified who needs to be informed of and included in impending changes, consider the specifics of how they should be included, and how you can communicate their inclusion most effectively. In addition to the questions posed during the stakeholder identification process, ask:

What is the best way for stakeholders to receive this information?

This will vary by stakeholder. In the DS sector it is particularly important to match your communication style to your audience, to ensure your message is accessible.

How much do they need/want to know about the change?

Who else will be involved in the change, and what will their roles be?

Will there be an opportunity for feedback on the change?

If so, how will this feedback be handled?

Who can stakeholders come to with questions about the change?



ACTIVITY: Step 5 — Activating Change

Once you have committed to a change plan, it is time to see it through. Now is the time to execute the plan you have worked so hard to develop. To effectively carry out your plan, you must determine:

What specific activities need to be carried out to fulfill this change plan?

What are the deliverables/outcomes that need to be achieved?

Who will be responsible for these activities, and who will they report to?

How will progress be tracked?

How will you know when the change process is complete?



ACTIVITY: Step 6 – Measuring Impact

The entire point of change is to create an outcome that has a desirable impact on stakeholders. Once you have completed your change plan, you need to evaluate the outcomes of your plan to determine if the change was successful, or if further change is necessary. You will also need to communicate the completion and impact of your change to stakeholders. Consider:

How will you track and record outcomes throughout your change plan?

How will you protect the data collected during your change plan?

How will you use the information collected from your change plan?

If outcomes are not matching expectations, how will you navigate your change plan moving forward?

What contingencies will you build into your change plan to maximize your outcomes and impact?

How will you measure impact on stakeholders? Describe your methods of tracking and recording impact.



ACTIVITY: Reporting Change

After the change plan is complete, consider:

How will you report on and communicate outcomes to stakeholders?

e.g., Newsletter, roundtable, local media

How will you use what you have learned from the change process/data collected during the process to improve service delivery?

How might data collected and impact measured inform future change initiatives within the organization?



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