



# Tips and tricks for managing stressful practice transitions



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# Disclosures



- Terri Fox has no relevant financial or non-financial interests to disclose.
- Lucy Counts has no relevant financial or non-financial interests to disclose.

# Learning Outcomes



- Understand the underlying causes of resistance to change.
- Describe methods of managing change to reduce anxiety among staff.
- Discuss ways to address self care in times of change.

# Causes of resistance to change



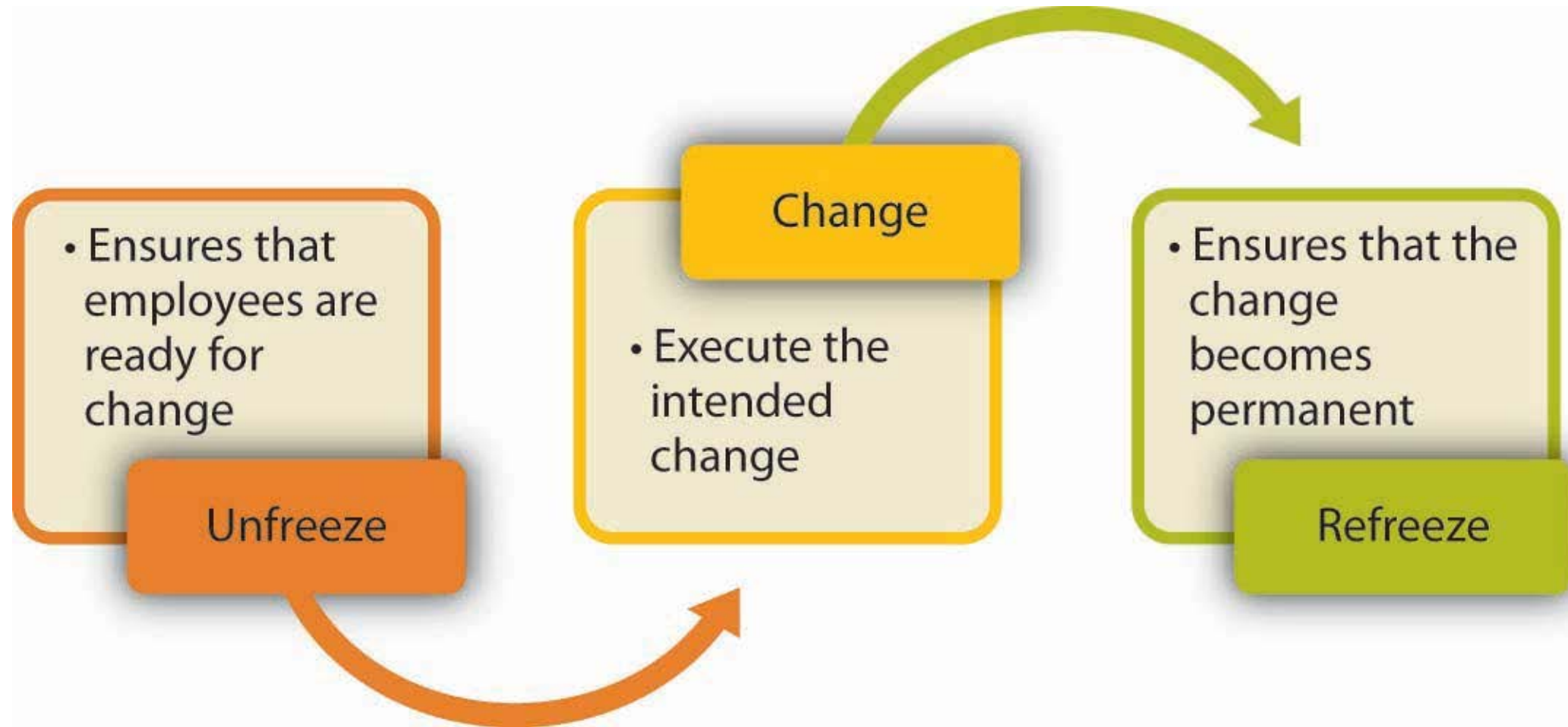
- Interference with personal goals and objectives
- Selective perception
- Habit
- Inconvenience/loss of freedom OR the perception thereof
- Economic implications
- Security in the past

# Causes of resistance to change continued



- Fear of the unknown
- Threats to power and influence
- Knowledge and skill obsolescence
- Organizational structure
- Limited resources

# Lewin's Theory of Change



# 10 Principles of Organizational Change



1. Lead with culture
2. Start at the top
3. Involve every layer
4. Make the rational and emotional case together
5. Act your new way of thinking
6. Engage, engage, engage
7. Lead outside the lines
8. Leverage formal solutions
9. Leverage informal solutions
10. Assess and adapt

# Lead with Culture

Principle One



# Lead with Culture continued



## DEFINITION:

How your unit or organization defines:

- Group norms
- Shared perceptions
- Values
- Goals and objectives
- Physical and philosophical vibe

# Tips and Tricks 1



## TIP:

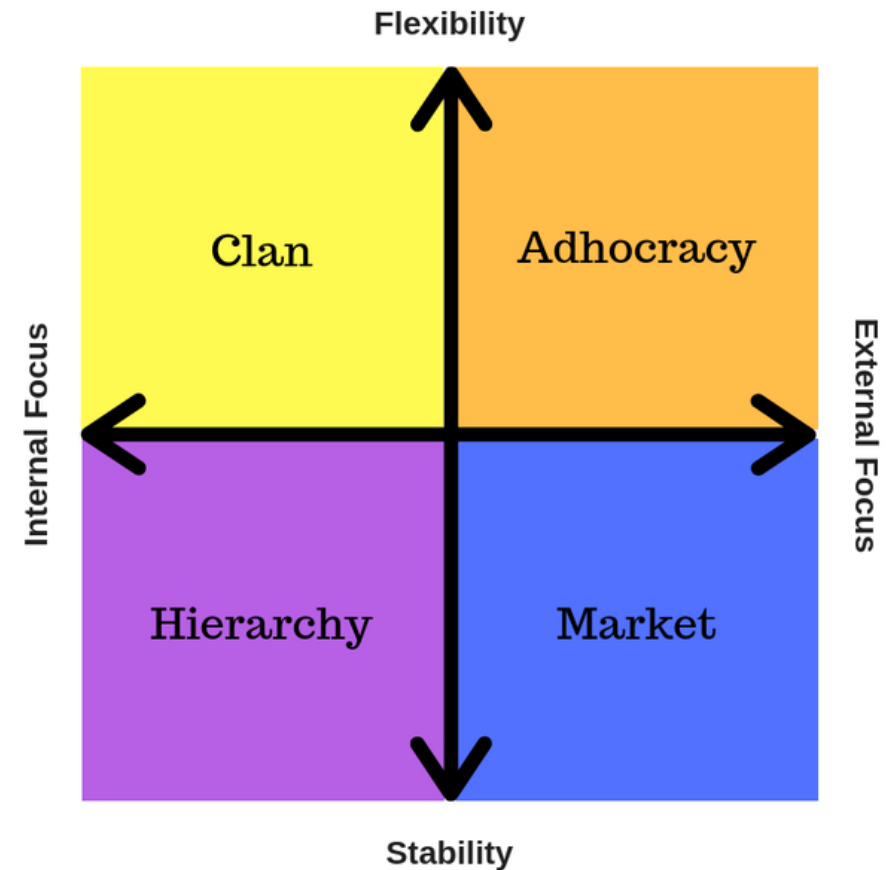
- There are many ways to define organizational culture; select a method that provides a distinct path towards making meaningful organizational change

## TRICKS:

- There are not less than 13 separate cultural assessments that were developed specifically for healthcare
- Look at this data at each level; don't settle on the aggregate; some levels of employment might need greater attention in shifting culture than others

# Principle in Action 1

- To improve performance, identify elements of a Market Organization that you can incorporate into your work culture
- To expand methods of working or interventions incorporate elements of adhocracy into your work culture
- To improve staff turnover rates, incorporate elements of a clan cultures into your organization



Quinn & Cameron, 1999

# Start at the Top

Principle Two

# Start at the top continued



- Most people do not like/are not comfortable with change, so “leaders” have to “lead”
  - Embrace and commit to change
  - Provide support at all levels to all who are going through the change



# Tips and Tricks 2



## TIP:

- Lead by example

## TRICKS:

- Periodically solicit informal feedback to gauge progress toward implementation of change(s)
- Use that feedback to determine whether process should be modified

# Principle in Action 2



- County government implemented an online grants management system
  - Program directors were informed of change in process
  - Change process was described at Planning Council and other provider meetings
  - Solicited feedback about the changes in the system
  - Modified system based on information received to expand mechanisms that allowed people to apply

# Involve Every Layer

Principle Three



# Involve Every Layer

- Get feedback early in the process from each role and/or if possible each person



# Tips and Tricks 3



## TIPS:

- Conversations and metrics can be guided by the type of change you are making
- Messaging should be relatable for every staff person

## TRICKS:

- Use evaluation philosophies that promote honesty amongst staff
  - Have an unbiased third party analyze data and report back to staff together
  - Allow for shared interpretation of results
- Practice at the leadership level saying yes or maybe to areas that staff repeatedly suggest need to be addressed

# Principle in Action 3



Less than 30% of staff completed annual climate survey. Almost none of the part time employees completed annual climate survey. Leadership found the data useless because it didn't answer their questions.



Leadership engaged in informal conversations with staff members about why they (or their friends) refused to complete the survey.



The agency engaged a unit of the organization to collect, manage, and report back findings including recommendations for improving organizational health. The improved to a 70% response rate.



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# Act your way into new thinking

Principle Four

# Act your way into new thinking



## DEFINITION:

Identify behaviors that are **CRITICAL** to the success of the changes you wish to implement and center regular activities around opportunities to demonstrate and assess those behaviors

# Tips and Tricks 4



## TIPS:

- Providing staff with concrete examples of how each role will shift towards the new cultural value or ideal
- Staff can be instrumental in identifying appropriate metrics

## TRICKS:

- Themed activities
- Encourage friendly competition OR use metrics to promote dialogue that then influences change

# Principle in Action 4



## Ending Programs/Losing grant funds

- Address impacts to both patients and staff
- Allow for informal participation in the transition/solution

# Engage, Engage, Engage

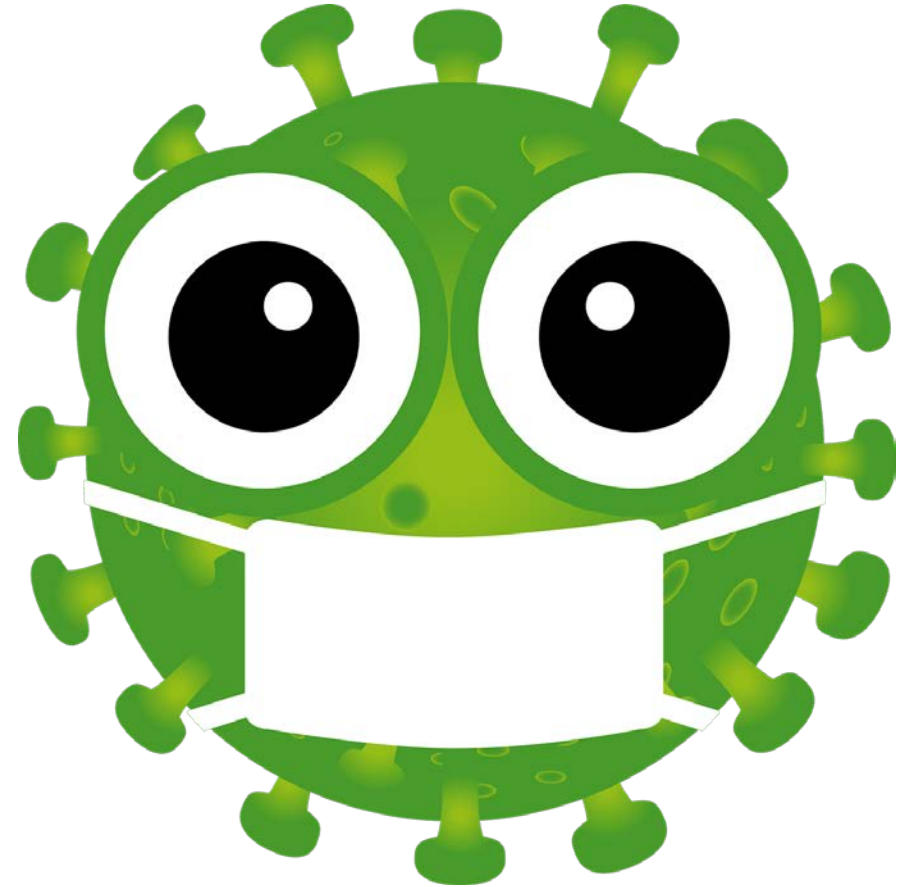
Principle Five



# Engage, engage, engage

DEFINITION:

QUALITY communication in many forms and places.



# Tips and Tricks 5



## TIPS:

- Attention to communication styles can improve transition outcomes
- There are many professional personality inventories that can help shape effective communication styles

## TRICKS:

- True Colors/DiSC
- Think through communications thoroughly
  - How does this sound to you?
  - What would your reaction be?
  - Does this response de-escalate?
- Engage an unbiased third party to help you think through response strategies

# Principle in Action 5



- Middlesex-Somerset-Hunterdon's Teatime with Terri and Lucy (aka Community Check Ins)
  - Provided controlled through a zoom environment
  - Weekly forum for community updates
  - Did NOT overlap ongoing meetings
  - Reviewed announcements from HAB/HRSA
  - Shared resources
  - Described ongoing expectations
  - Prescribed training based on agency needs
  - Redefined meeting space to address fears and concerns



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# Lead Outside the lines

Principle Six

# Lead outside the lines continued

The marriage of formal metrics  
with informal communication

- Every person in the organization understands and can access performance metrics
- Capitalize on existing strengths within the organization to promote change



*Informal Communication*



# Tips and Tricks 6



## TIPS:

- Leadership does not have to do the heavy lifting alone when implementing organizational change
- Leading outside the lines gives staff the opportunity to feel important, part of something bigger and builds on their skills

## TRICKS:

- Engage and enlist pride builders
- Identify and capitalize on trusted nodes
- Recruit and lead change or culture ambassadors

# Principle in Action 6



## The Organizational Health Committee:

- No more than two people from each 'office'
- No supervisor/supervisee pairs allowed on the committee
- Freedom to identify and address issues that were important to staff members across multiple offices
- Revised staff climate survey
- Required leadership to identify change actions
- NOT the party planning committee

# Make a Rational AND Emotional case together

Principle Seven



# Make a rational and emotional case together



- Rational (*adj.*) – based on or in accordance with reason or logic
- Emotional (*adj.*) – relating to a person's emotions

*Making it all make sense*

# Tips and Tricks 7



## TIP:

- Involve everyone in the process

## TRICKS:

- Positively reinforce why there is a need to do things differently
- Gauge UNDERSTANDING of the changes

# Principle in Action 7

CQI and CQW Awards for  
annual recognition





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# Leverage Formal Solutions 1

Principle Eight

# Leverage formal solutions 1 continued



- It is not enough to *just* implement change. Ongoing support of everyone involved, at all levels, from the top to the bottom should be prioritized.

# Tips and Tricks 8



## TIP:

- Support, support, support

## TRICK:

- Find out what is needed to maintain the change in culture

# Principle in Action 8



- Staff development requirements
  - Formal training
  - Peer to peer



# Leverage Informal Solutions 2

Principle Nine



# Leverage Informal Solutions 2 continued



DEFINITION: Informal solutions are those that can be immediately implemented; that don't require permission or committee, funding or excessive additional resource.

# Tips and Tricks 9

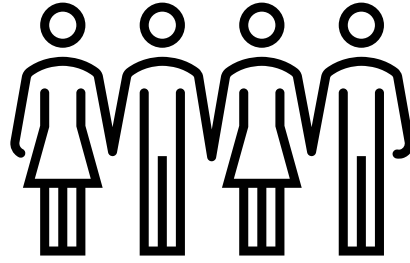


## TIP:

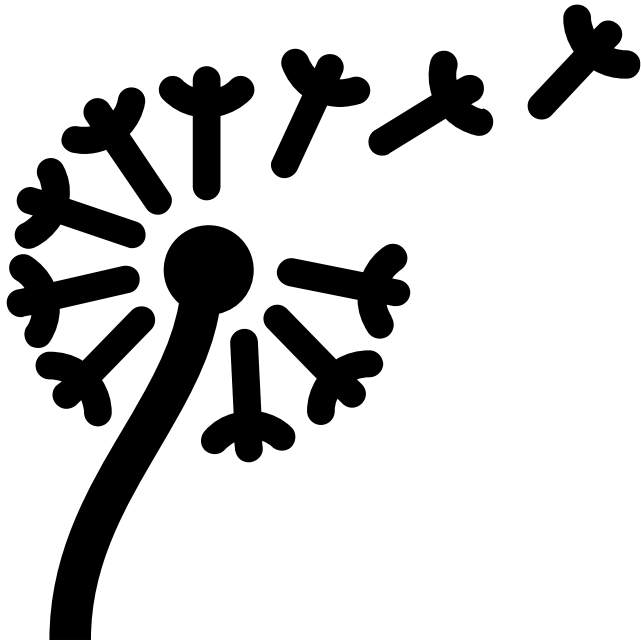
- When leveraging informal solutions to promote organizational change, they should ignite both rationale and emotional interests in your staff

## TRICK:

- Informal solutions can be entirely dictated (and therefore implemented) by committees with diverse staff representation
- Avoid placing supervisors on the same committees as staff



- EIP Support Group during quarantine



- Fairy Dusting

## Principle in Action 9



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# Assess and Adapt

Principle Ten

# Assess and Adapt continued



We've done all of this work...we've made the changes...things seem to be working...everyone is happy...

NOW WHAT!?!?!?

WHAT'S NEXT?

WILL THERE BE MORE CHANGES?

# Tips and Tricks 10



## TIPS:

- Change is constant
- Listen
- Be open to all feedback
- Be prepared to make future changes

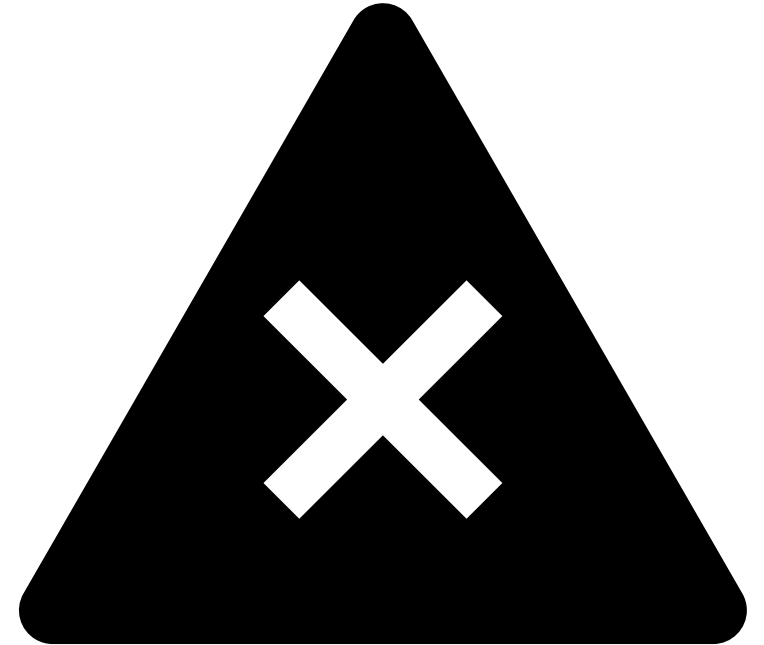
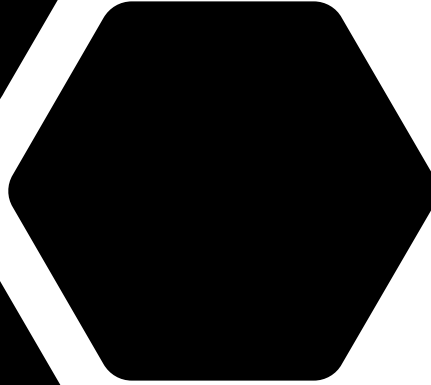
## TRICKS:

- Regular “check ins” to assess the change implementation
- USE feedback, when appropriate, to modify implemented changes

# Principle in Action

## 10

- Program Monitoring
  - Reviewing previous findings
  - Corrective Action Plans





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# Make Self Care a Priority

Principle Eleven



# Promoting Self Care at the Systems Level



## TIPS:

- EXTENUATING circumstances create opportunities for flexibility and different ways of thinking

## TRICKS:

- Get ideas from your culture ambassadors
- Create space for self care discussions in formal environments
- Encourage staff to be in touch with their limits

# Principle in Action 11

- Incorporated self care into every Case Management Coordination Update
  - Formal training
  - Hybrid of guided meditation (Youtube)
  - Shared activities



# Summary of key actions



- Include all staff in planning change implementation
- Get feedback from your teams
- Use unbiased third parties either for additional perspective or to promote an safe environment to gather feedback
- Lead by example
- Use formal or informal assessment tools to help guide your next steps
- Make room to address emotional responses from leadership and staff

## 10 Key Principles of Organizational Change

- <https://www.tlnt.com/10-key-principles-for-the-majority-of-us-who-need-cultural-change/>

## Mastering the hidden dynamics of organizational change:

- [https://informalcoalitions.typepad.com/informal\\_coalitions/](https://informalcoalitions.typepad.com/informal_coalitions/)

## Culture Change that sticks:

- <https://hbr.org/2012/07/cultural-change-that-sticks>

## How to deal with resistance to change

- <https://hbr.org/1969/01/how-to-deal-with-resistance-to-change>

# Contact Information



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