Managing Change in Turbulent Times

A Facilitated Discussion

Mark D. Sugrue RN, BC
Rita D. Zielstorff RN, MS, FACMI
April 29, 2011
• Introduction – YOUR Participation !!
• Leadership & Change
• Theoretical Basis for Change Management
• Practical Application – Force Field Analysis
Informatics-in-Action !!!

Using the Audience Polling Device

Your vote counts !!
What is your favorite flavor of ICE CREAM?

1. Vanilla
2. Chocolate
3. Strawberry
4. Other
Our Job as Leaders...
Leading Projects & Transitioning our Teams
What is Change?

- Change management is a structured approach to transitioning individuals, teams, and organizations from a current state to a desired future state. ... (wikipedia)

- The coordination of a structured period of transition from situation A to situation B in order to achieve lasting change within an organization. (BNET Business Dictionary)

- ….. Interestingly, there is no published definition in either Project Management Book of Knowledge (PMI) or the HIMSS on-line dictionary (HIMSS).
Foundation for Change

- Why is change necessary at this time?
- What are the top 4-5 pressures, either inside or outside the organization?
- What is at stake if nothing is done to respond to these pressures?
- What is the desired future you are trying to create for the organization?
The PRIMARY driver of change in my organization TODAY is:

1. Leadership
2. Financial Drivers
3. Government Regulatory Drivers
4. Patient Safety
5. Other
Theoretical Basis for Change Management
Change Theory

Theories that explain how systems, including people and organizations, experience and respond to alterations in the environment.
Tell me and I`ll forget, show me and I may remember, involve me and I`ll understand.

Chinese Proverb
Change Theory

- Kurt Lewin’s Theory – Planned Change

![Diagram showing the three stages of change: Unfreezing, Moving, Re-freezing, and the forces driving and resisting change.](image)
### Change Theory

| Need for Change | Shared Vision | Leadership Commitment | Employee Involvement/Commitment | Integrated Organizational Changes | Performance Measures | Lasting Change |
|----------------|---------------|-----------------------|--------------------------------|----------------------------------|----------------------|----------------|-----------------|
| ![Emoji]        | ![Emoji]      | ![Emoji]              | ![Emoji]                        | ![Emoji]                         | ![Emoji]              | ![Emoji]       | No Measurable Results |

*Note: The table represents different scenarios in change management with various levels of success based on the combination of factors.*
Peter F. Drucker:

“Everybody has accepted by now that change is unavoidable…. 

... But that still implies that change is like death and taxes. It should be postponed as long as possible and no change would be vastly preferable...
... But in a period of upheaval, such as the one we are living in, change is the norm.”

Peter F. Drucker
“It's not the progress I mind, it's the change I don't like.”

Mark Twain
Nurses as Change Managers

Nurses bring particular strengths to the change management process

1. The Nursing Process Model is a problem solving model
Nurses as Change Managers

2. Our knowledge of human behavior
3. Our skills in education
4. Our ability to advocate for clinicians
Nurses as Change Managers

- All of this is foundational to our skills as informaticians
In my current role I am expected to LEAD major change initiatives in my organization

1. True
2. False
FORCE FIELD ANALYSIS

A CHANGE MANAGEMENT TOOL

- Developed by Kurt Lewin, PhD, the “father of modern social psychology”
How familiar are you with Lewin’s Force Field Analysis?

1. Very familiar
2. Somewhat familiar
3. Not familiar
Force Field Analysis

Helps the change agent to:

- ASSESS the current situation, determining the forces for and against a proposed change
- DETERMINE the likelihood of success, given the prevailing forces
- PLAN actions that will strengthen the supporting forces, and reduce the opposing forces
- IMPLEMENT the plan
- EVALUATE whether the actions have had the desired effect
Force Field Analysis: The Theory

Forces For (Driving Forces)
- Public safety
- Law enforcement

Automatic traffic lights: fixed intervals

Forces Against (Restraining Forces)
- Driver inconvenience
- Pedestrian inconvenience
Force Field Analysis: The Theory

**Forces For** (Driving Forces)

- Public safety
- Law enforcement

**Forces Against** (Restraining Forces)

- Driver inconvenience
- Pedestrian inconvenience

Automatic traffic lights: fixed intervals

Force values:
- Public safety: 4
- Law enforcement: 5
- Driver inconvenience: 4
- Pedestrian inconvenience: 8
- Overall: 9

Forces For:

- Law enforcement: 5
- Public safety: 4

Forces Against:

- Driver inconvenience: 4
- Pedestrian inconvenience: 8

Overall force: 9
Using Force Field Analysis to Manage Change: Step One

Forces For (Driving Forces)

Desired State

Change nursing assessment from manual to automated

Forces Against (Restraining Forces)
Using Force Field Analysis to Manage Change: Step Two

**Forces For** (Driving Forces)

- Administrative mandate
- Better communication
- Time savings (long term)
- Decision support (^ quality)

**Desired State**

Change nursing assessment from manual to automated

**Forces Against** (Restraining Forces)

- Cost of technology
- Staff resistance: unfamiliarity
- More time-consuming (short term)
- Constrained resources (implementation)
Using Force Field Analysis to Manage Change: Step Three

Forces For (Driving Forces)

- Administrative mandate: 4
- Better communication: 3
- Time savings (long term): 3
- Decision support (^ quality): 3

Desired State

Change nursing assessment from manual to automated

Forces Against (Restraining Forces)

- Cost of technology: 2
- Staff resistance: unfamiliarity: 5
- More time-consuming (short term): 4
- Constrained resources (implementation): 5

Total:

Forces For: 13
Forces Against: 16
If you were the project manager, what would be your highest priority?

1. Strengthen the driving forces
2. Reduce the restraining forces
3. Do both

1 2 3
33% 33% 33%
Using Force Field Analysis to Manage Change: Points to Remember

It’s better to reduce restraining forces than to strengthen driving forces

• Restraining forces will strengthen themselves in the face of resistance (more on this later…)
A Real-Life Example: The Estimates

Forces For (Driving Forces)
- Medical Dept permission
- Nursing Dept permission
- Nursing staff and leadership support
- Grant-funded experiment

Forces Against (Restraining Forces)
- Resident skepticism
- Temporary nature of project
- More time-consuming (short term)

Desired State
- Physician Order Entry and Automated Med Charting changed from manual to automated (grant funded trial)

Total:
- Forces For: 16
- Forces Against: 7
A Real-Life Example: The Actuals

Forces For (Driving Forces)
- Medical Dept permission: 2
- Nursing Dept permission: 2
- Nursing staff and leadership support: 4
- Grant-funded experiment: 2

Desired State
- Physician Order Entry and Automated Med Charting changed from manual to automated (grant funded trial): 10

Forces Against (Restraining Forces)
- Resident resistance/sabotage: 5
- Temporary nature of project: 5
- More time-consuming (short term): 5

Total:
- Forces For: 10
- Forces Against: 15
Using Force Field Analysis to Manage Change: Points to Remember

Be brutally honest in defining forces for and against, and in determining values

• Small group process is best, to balance natural bias
• Failing to account for forces on either side could make the difference in success or failure
• Failing to accurately quantify the strength of the forces on either side could make the difference in success or failure
Group Discussion

Have you used Force Field Analysis on a project? What was your experience, and what were the results?

Might you use Force Field Analysis on a current or impending project?
REMINDER

☐ TURN ME IN !!
THANK YOU!

Mark Sugrue
mark.d.sugrue@us.pwc.com

Rita Zielstorff
rzielstorff@comcast.net