



Managing Change

Competencies

"This Deep Dive draws from one of the Areas of Competence in the [Career Development Manager/Leader Competency Framework](#). Through reflection, analysis of real situations, and practical activities, you'll explore how this part of the framework shapes your leadership practice."

The Challenge Ahead

In human services, change is inevitable, driven by evolving policy, funding, technology, and client needs. This change is not abstract; it directly impacts our people. Without thoughtful leadership, even necessary shifts can quickly lead to confusion, resistance, and burnout.

Leaders frequently navigate the tension between urgency and uncertainty. They often face challenges in communicating the 'why,' managing resistance, and sustaining team morale. As a result, teams may feel disconnected, overwhelmed, or skeptical about the path forward.

The Leader's Role in Managing Change

William Bridges emphasizes that **change is situational, but transition is psychological**. His model includes three phases:

- **Ending, Losing, Letting Go** – People must let go of old ways and identities
- **Neutral Zone** – A liminal space of confusion, creativity, and adjustment
- **New Beginning** – People embrace new identities and ways of working

This model helps leaders support emotional responses to change, not just logistical ones. Your role is to guide people through the transition—not just to implement change, but to lead it. That means:

- Communicating the rationale and vision for change
- Anticipating resistance and responding with empathy
- Engaging people early and often
- Supporting teams through uncertainty and setbacks
- Modeling commitment, adaptability, and optimism

Change leadership is not about having all the answers—it's about creating the conditions for people to move forward together.

This resource is about leading change with clarity and compassion. It's about creating space for dialogue, building engagement, and supporting people through the messy middle. When leaders do this well, change becomes not just possible—but purposeful. It includes three exercises that will help:

1. Clarify the Case for Change
2. Transition Reflection
3. Monitor and Support Implementation
4. Reflect and Reinforce

"People don't resist change. They resist being changed." — *John Kotter, Leading Change*



Exercise 1: Clarify the Case for Change



Purpose

To help leaders and teams articulate the rationale, urgency, and desired outcomes of a change initiative. This exercise supports alignment, transparency, and engagement by making the “why” of change visible and actionable.



Preparation

- Schedule 45–60 minutes for the session.
- Share the purpose of the activity in advance to build trust and readiness.
- Provide the Change Rationale Canvas worksheet (or flipcharts / whiteboards).
- Consider pairing this with a visual roadmap or communication plan.



How to Use It

Step-by-Step

1. **Frame the Conversation:** Begin by emphasizing that clarity is the foundation of successful change. People commit more fully when they understand what’s changing, why it matters, and how it connects to their work and values.
2. **Review the Prompts:** Walk through each section of the worksheet:
 - What is changing—and why?
 - What are the drivers of this change?
 - What outcomes are we aiming for?
 - What happens if we don’t change?
 - How will we communicate this clearly?
3. **Clarify each prompt and invite examples relevant to your team’s context.**
4. **Complete the Canvas Together:** Invite participants to contribute their insights. Use guiding questions like:
 - “What’s the story behind this change?”
 - “What pressures or opportunities are driving it?”
 - “What does success look like?”





- “What concerns might people have—and how can we address them?”

5. **Align on Messaging** Discuss how the rationale will be communicated to different audiences (e.g., staff, clients, partners). Consider tone, format, and timing.
6. **Document and Share:** Capture the completed canvas and use it to inform future communication, engagement, and planning efforts. Consider turning it into a visual or narrative summary.



**Pro Tips
for Success**

- Use plain language and avoid jargon.
- Invite diverse perspectives to enrich the rationale.
- Reinforce how the change connects to values, mission, and service impact.





Worksheet 1:
Change Rationale Canvas

Purpose

Define the drivers, goals, and urgency of the change.

What is changing—and why?	
What are the drivers of this change?	
What outcomes are we aiming for?	
What happens if we don't change?	
How will we communicate this clearly?	





Worksheet 1:
Change Rationale Canvas (Sample)

Purpose

Define the drivers, goals, and urgency of the change.

What is changing—and why?	Intake process will shift to include trauma-informed practices
What are the drivers of this change?	Client feedback, staff burnout, sector best practices
What outcomes are we aiming for?	Increased engagement, reduced drop-off, improved staff confidence
What happens if we don't change?	Continued disengagement, missed opportunities for support
How will we communicate this clearly?	Staff huddles, client advisory input, visual roadmap





Exercise 2: Transition Reflection



Purpose

To help leaders and teams identify and prepare for the many responses to change, explore underlying concerns, and provide empathetic support. This exercise supports psychological safety, proactive planning, and inclusive change leadership.



Preparation

- Schedule 45–60 minutes for the session.
- Share the purpose of the activity in advance to normalize varied responses as a natural part of change.
- Consider pairing this with a brief overview of Bridges' Transition Model.



How to Use It

Step-by-Step

1. **Frame the Conversation** Begin by emphasizing that resistance is not a problem to eliminate—it's a signal to understand. It often reflects loss, uncertainty, or unmet needs. This exercise is about listening, learning, and leading with empathy.
2. **Review the Worksheet**
 - Transition Reflection Worksheet: Explores emotional transitions and strategic responses.
3. **Explore Emotional Transitions** Use the Transition Reflection worksheet to deepen understanding:
 - "What are people letting go of? "How might that show up—in behaviour, tone, or engagement?"
 - "How can we support them in the neutral zone?"
 - "What new beginning are we helping them move toward?"
 - "What short-term wins can build momentum?"
 - "Who can champion this change and build trust?"





4. **Develop Response Strategies** Brainstorm practical, empathetic responses. Consider communication, coaching, peer support, and visible leadership behaviours.
5. **Document and Follow Up** Capture key insights and strategies. Assign follow-up actions and revisit resistance patterns as the change progresses.



Pro Tips

- Normalize resistance as part of the human experience.
- Use real examples to ground the conversation.
- Invite diverse perspectives—including frontline voices.
- Reinforce that empathy and clarity are leadership tools, not soft skills.



Worksheet 2: Transition Reflection

Purpose

To help leaders and teams identify and prepare for the many responses to change, explore underlying concerns, and provide empathetic support.

What are people letting go of in this change?	
What emotions or losses might be surfacing?	
How are we supporting people in the neutral zone?	
What new beginning are we helping them move toward?	
What short-term wins can we create to build momentum?	
Who can help champion the change and build trust?	





Worksheet 2:
Transition Reflection (Sample)

Purpose

To help leaders and teams identify and prepare for the many responses to change, explore underlying concerns, and provide empathetic support.

What are people letting go of in this change?	Familiar intake routines; sense of control
What emotions or losses might be surfacing?	Anxiety, skepticism, grief over “how things used to be”
How are we supporting people in the neutral zone?	Peer coaching, open forums, visual roadmap
What new beginning are we helping them move toward?	Trauma-informed intake that feels empowering for staff and clients
What short-term wins can we create to build momentum?	Staff-led pilot with positive feedback; client testimonials
Who can help champion the change and build trust?	Peer mentors, respected program leads, client advisors





Exercise 3: Monitor and Support Implementation



Purpose

To help leaders and teams actively track the progress of a change initiative, identify barriers, and provide timely support to sustain momentum. This exercise reinforces accountability, adaptability, and shared ownership of implementation.



Preparation

- Schedule 45–60 minutes for the session.
- Share the purpose of the activity in advance to foster transparency and collaboration.
- Provide the Change Implementation Tracker worksheet.
- Consider pairing this with a visual roadmap or progress dashboard



How to Use It

Step-by-Step

1. **Frame the Conversation** Begin by emphasizing that successful change requires ongoing attention—not just a strong launch. Monitoring progress helps teams stay aligned, adapt to challenges, and celebrate wins along the way.
2. **Review the Worksheet** Walk through each column of the Change Implementation Tracker:
 - Key actions or milestones
 - Responsible person or team
 - Timeline or due date
 - Status (e.g., not started, in progress, completed)
 - Barriers or risks
 - Support needed
3. **Populate the Tracker Together** Invite the team to identify current or upcoming implementation steps. Use guiding questions like:
 - “What actions are underway or coming up?”
 - “Who’s leading each piece?”
 - “Where are we seeing progress—or delays?”
 - “What support would help move things forward?”





4. **Surface Barriers and Needs** For each action, discuss any challenges or risks. Encourage honest reflection and problem-solving. Identify where additional support, resources, or communication may be needed.
5. **Assign Follow-Up Actions** Document next steps and assign ownership. Consider scheduling regular check-ins to revisit the tracker and update progress.
6. **Celebrate Wins and Adjust Plans** Acknowledge completed milestones and team efforts. If timelines or strategies need to shift, do so collaboratively and transparently.



Pro Tips

- Use the tracker as a living tool—update it regularly.
- Normalize the need for support and adaptation.
- Reinforce shared ownership and cross-team collaboration.
- Celebrate progress, even small steps.





Worksheet 3: Change Implementation Tracker

Purpose

Track progress, identify challenges, and support teams.

NOTE: You may find the Planning and Management of Resources material useful in your change implementation. Your organization may have project tracking applications in use, use what works best for you and your team.

Change Project:

Milestone	Owner	Timeline	Status	Notes





Worksheet 3: Change Implementation Tracker (Sample)

Purpose

Track progress, identify challenges, and support teams.

NOTE: You may find the Planning and Management of Resources material useful in your change implementation. Your organization may have project tracking applications in use, use what works best for you and your team.

Change Project:

Milestone	Owner	Timeline	Status	Notes
Staff training complete	HR Lead	Month 1	In progress	Need trauma-informed trainer
Pilot launch	Program Manager	Month 2	Not started	Waiting on intake form redesign





Exercise 4: Reflect and Reinforce



Purpose

To help leaders and teams pause, reflect on what's been learned and accomplished, and identify ways to reinforce new behaviours, systems, and mindsets.



Preparation

- Schedule 45–60 minutes for the session.
- Share the purpose of the activity in advance to foster openness and celebration.
- Provide the discussion prompts.
- Consider pairing this with a visual timeline, milestone tracker, or feedback summary.



How to Use It

Step-by-Step

1. **Frame the Conversation** Begin by emphasizing that reflection is a leadership practice—not a luxury. It helps teams consolidate learning, recognize effort, and identify what needs to be reinforced to sustain change.
2. **Review the Prompts** Walk through the reflection questions:
 - What have we accomplished so far?
 - What behaviours or systems have shifted?
 - What helped us succeed?
 - What challenges did we overcome?
 - What still needs attention or support?
 - How will we reinforce and sustain these changes?
3. **Facilitate Group Reflection** Invite participants to share insights, stories, and observations. Use guiding questions like:
 - “What are we proud of?”
 - “What surprised us?”
 - “What feels different now?”
 - “What do we want to keep doing—and why?”





4. **Identify Reinforcement Strategies** Brainstorm ways to sustain the change. Consider:
 - Recognition and storytelling
 - Updated policies or workflows
 - Ongoing coaching or peer support
 - Visual reminders or rituals
 - Leadership modeling and accountability
5. **Document and Share Commitments** Capture key insights and reinforcement strategies. Invite each participant to name one commitment to carry forward.
6. **Celebrate Progress** Close the session by acknowledging the team's effort, adaptability, and growth. Consider a symbolic gesture (e.g., a shared visual, a team affirmation, or a milestone marker).



Pro Tips for Success

- Create space for emotion and storytelling.
- Reinforce that change is a journey, not a checklist.
- Celebrate both outcomes and effort.

