



**DISABILITY THRIVE INITIATIVE**  
*Alternative Services and Supports for the IDD Community*

# **CHANGE MANAGEMENT STRATEGIES FOR DISABILITY SERVICES TO THRIVE**

**JUNE 9, 2021**

# WEBINAR TIPS AND INFORMATION PART 1



Para interpretación en español, haga clic en el ícono de globo blanco a continuación etiquetado como "Interpretación" y seleccione el canal en español



Visibility of ASL Interpreters is top priority. You may not always be able to see the presenter



This presentation will have closed captioning, which you can access using the button at the bottom of your screen



Webinar features vary by device and Zoom version

# WEBINAR TIPS AND INFORMATION PART 2



The meeting is being recorded



You are on mute and your camera is not on



Submit all questions using Q&A feature below



“Chat” and “Hand Raise” features are off



Please use survey at the end of this session for feedback and suggestions

# WEBINAR INTRODUCTION



**Barry Jardini**

Executive Director

—  
**California Disability  
Services Association**



CALIFORNIA  
**Disability  
Services**  
ASSOCIATION

# MEET OUR PRESENTERS



**Bryan Neider**

Chief Executive Officer

—  
**AbilityPath**



**Jennifer Holk**

Strategy Manager

—  
**Monitor Institute by  
Deloitte**



# TOPICS WE'LL BE DISCUSSING TODAY



1

## **The Big Picture: Preparing for the “New Normal”**

Scenario planning and preparation for the “new normal”

2

## **Managing Change**

How to prepare yourself and your team to manage through change

3

## **Q & A**



**"WE'RE ALL FACING THE SAME STORM, BUT WE'RE NOT ALL IN THE SAME BOAT. SOME OF US ARE IN DUCT-TAPED RAFTS AND OTHERS ARE IN REINFORCED CRUISER SHIPS AND THERE'S REALLY NO COMPARING THE VESSELS."**

- Tulaine Montgomery, New Profit



**"WE'RE NOW DEALING WITH THREE CRISES AT THE SAME TIME: A HEALTH CRISIS, AN ECONOMIC CRISIS, AND A SOCIAL JUSTICE CRISIS."**

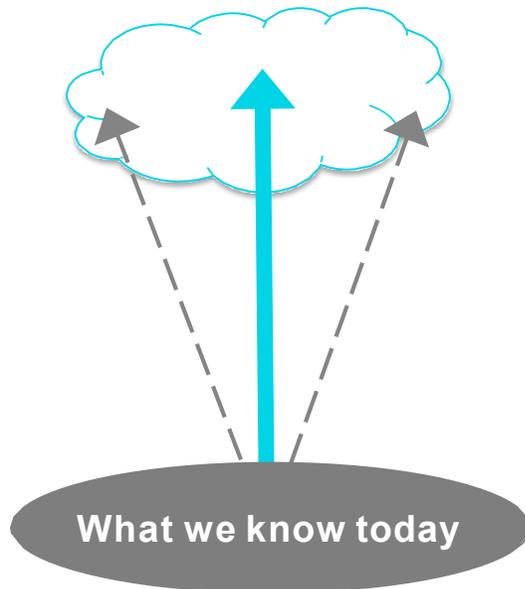
- Mario Morino, Morino Ventures LLC

# SCENARIO PLANNING VS CONVENTIONAL APPROACHES

## FORECAST PLANNING

*Traditional approaches to planning yield conventional, incremental and often unsurprising answers...*

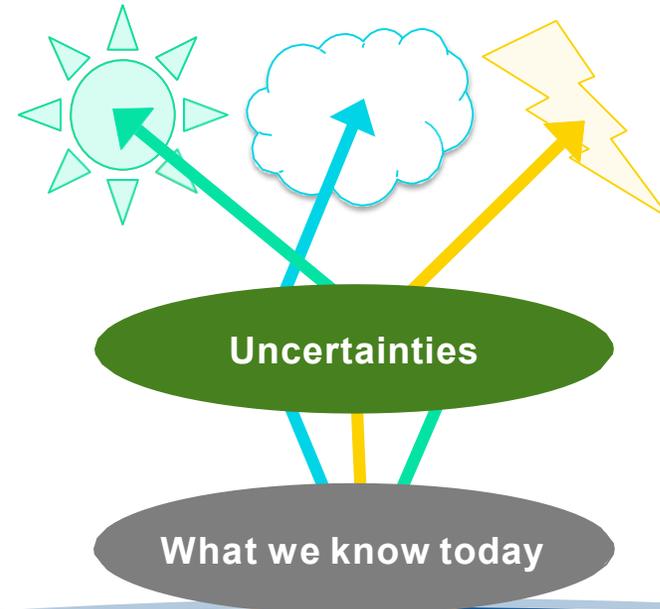
**One "Official" Future**



## SCENARIO PLANNING

*..Scenario Planning challenges assumptions and provides organizations with more options to make better decisions across a range of possible futures.*

**Multiple Possible Futures**



# PRUDENT ASSUMPTIONS



We identified five “prudent assumptions”—baseline realities that we need to come to terms with and hold onto in order to move forward



The pandemic will intersect with and **compound other ongoing trends**



The **need for nonprofit services will dwarf available capacity and resources**



A significant number of nonprofits will be **forced to consolidate or close their doors**



Impact from the crisis will fall **disproportionally on communities of color** and other marginalized populations



Differences in outbreak rates and reopening strategies will cause **varying levels of crises** and need across geographies and time

# CRITICAL AXES OF UNCERTAINTY



We chose the two critical uncertainties that we thought would create scenarios that paint four very different futures.

## What is the continued severity of the crisis?

Lower  
Impact



- The virus is **brought under relative control** by the development of treatments, testing and monitoring, and/or vaccines
- The **economy steadily recovers**, and the economic downturn, while bad, is more limited

- The virus is harder to control and the number of **infections and deaths soar**
- The **economy is devastated** as cities and states are repeatedly forced to shut down and shelter in place. Unemployment and other economic indicators persist and record levels

Higher  
Impact

## What is the level of social cooperation?

Fragmented  
Sporadic  
Factional  
Variable



- **Breaches of institutional trust** limit our ability to effectively work toward common goals
- Where coordination is found, it is entirely **factional in nature**
- Attempts for change and reform are **gridlocked**

- A unified **sense of purpose** to address the crisis ultimately prevails
- People and organizations seek out ways to **collectively solve cross-sector problems**
- The value of **collective responsibility** is prioritized, and many divisions are overcome

United  
Enduring  
Broad-based

# POLL 1



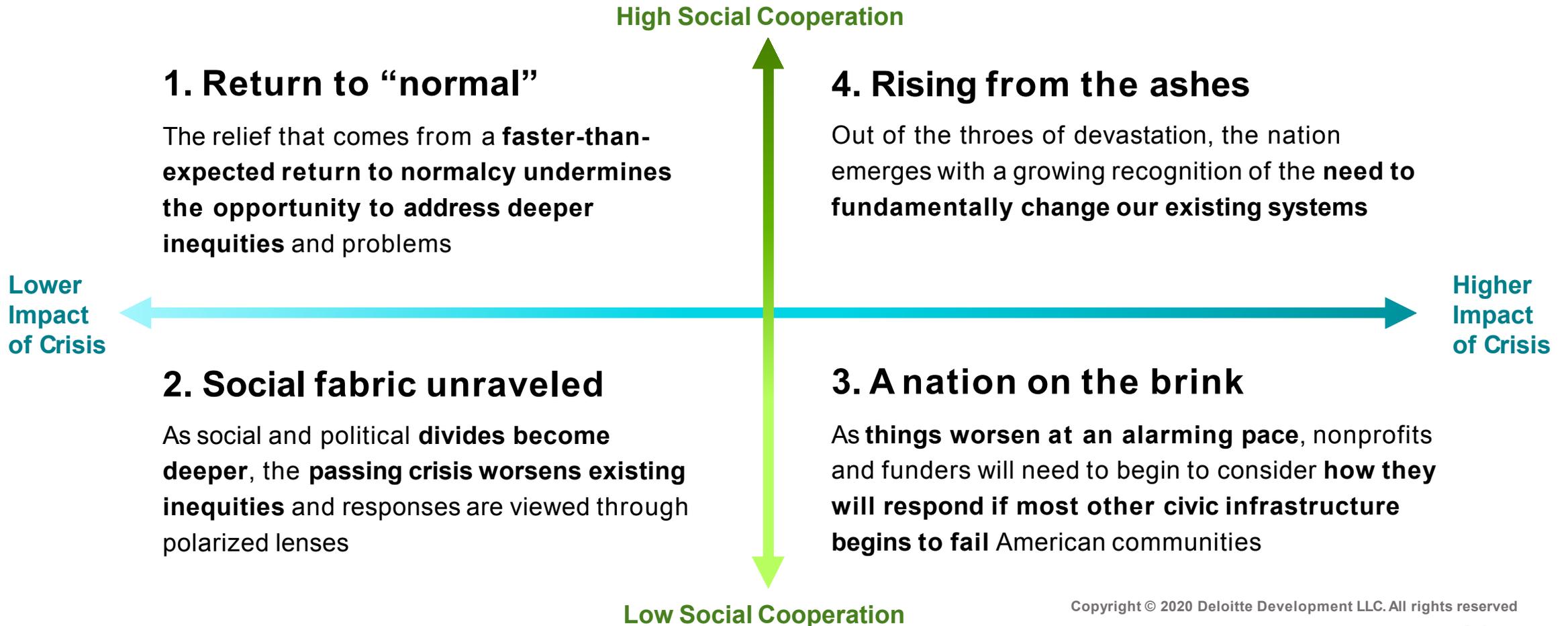
## **What do you believe are your biggest barriers to change?**

- Technology
- Staffing
- Financial restraints/Resources
- Stakeholder Buy-In
- Time

# SCENARIOS SUMMARY



The scenarios explore what the future could look like as of December 2021 depending on the severity of the crisis and whether we come together as a nation—or come apart



# SCENARIOS APPLICATION



The four activities below can help you build the scenario planning “muscle” when thinking about your strategy

1

## **Make the scenarios your own.**

Tailor the uncertainties and scenarios to fit your organization and the people, places, and issues you care about.

2

## **Find your anchors.**

Having clarity about your core beliefs, values, and principles can help ground the decisions your organization will need to make.

3

## **Test your current strategy against each scenario.**

Explore how your organization might adapt by asking the tough questions about your mission, strategies, and operations.

4

## **Develop a plan for 12 to 18 months, in 6 month increments.**

Planning in these conditions is not about having a full operational plan for each scenario, but about having sufficient flexibility and choices as conditions change.

# TAKEAWAYS FOR THE SOCIAL SECTOR



---

**Do not lock yourself in and plan for just one expected future**



---

**Act with urgency and agency in responding to the crisis**



**"CHANGE WILL NOT COME IF WE WAIT FOR SOME OTHER PERSON OR SOME OTHER TIME. WE ARE THE ONES WE'VE BEEN WAITING FOR. WE ARE THE CHANGE THAT WE SEEK."**

- Former President Barack Obama

# IMPORTANT CHANGE PROCESS CONSIDERATIONS



Five important “change considerations” that you’ll need to prepare for when embarking on your change initiative.



Balancing act between **current demands and a vision of a better future**



**Communicate the “Why”.** Engage the heart to beginning building support for the work ahead.



**Be prepared for setbacks and resistance. Don’t get discouraged.** Be willing to adjust and adapt, without losing sight of your goals.



**Celebrate each “win” on your journey.** Communicate the vision and progress often.



**Make change a core value and strength of your organization’s culture.** Change is the one constant we can rely on. We either plan for it and lead it, or we’re left having to react to it.

## POLL 2



**As you contemplate change, do you feel your organization is prepared and ready for it?**

- Yes
- No
- Somewhat

# CRITICAL AXES OF CHANGE



Assessing your team, and the impact to your mission

Where is my team at in being able to **manage through change?**

**Risk and  
Change  
Adverse**



- **Change is unsettling.** Change creates emotional risk. Coupled with the mindset of scarcity, the fear of change has negatively impacted our service sector for far too long.
- **We have very creative and resourceful teams.** Where you can, invest in support, and training. Start small and grow from success.

- **Empower and unleash your team** to take on new challenges. Where you can, use pro bono resources to accelerate the work, increase your team's knowledge base and skills. (Stanford ACT, Taproot, Harvard Business School Community Partners)
- **Reinforce the necessity for change and support ongoing learning.** People need to feel safe taking risks and that failures will happen and be forgiven.

**Adept at  
Managing  
Change**

What is the **benefit to our mission?**

**Very low  
impact to  
our mission**



- **Start small to build a track record of wins.** While successes aren't so visible, failures are either.
- **Find allies and champions of change** as you start with smaller initiatives.
- **Invest in and support training** and team dynamics.

- **When embarking on a major change initiative, be visible and open to feedback.**
- **Share your plans** with your board, your staff, your community and participants. Enlist their support!
- Seek out ways to collectively solve big problems and find new opportunities, **even partner with other organizations.**

**Significant  
impact to  
our mission**

# KICKING OFF CHANGE INITIATIVES



Assess the scope and complexity of the change initiative you're anticipating. In addition, it is important to determine your organizations *emotional* change "readiness", as well as the skills necessary to succeed. It can be beneficial to start small, developing your team's skills, and confidence.

High Organizational Impact

## 1. Easy Win

A high organizational impact change, with limited organizational disruption, can be the quick and easy "win" to garner support for more complex and challenging change initiatives in the future.

## 4. Go Big

These can be transformational initiatives. They require broad organizational and sometimes community buy-in. Communication is critical to paint the vision and the payback for the work ahead. Subject matter experts can be helpful.

## 2. Ask Why

A low impact change initiative, with limited organizational engagement, should only be pursued when other, more impactful initiatives have already been implemented. Alternatively, these can be delegated as ongoing individual goals.

## 3. What's The Opportunity Cost

These complex, yet lower payback initiatives need to be weighed against the opportunity cost for time and resources for other projects. These change initiatives can be used to "train" cross-collaboration and skills development in anticipation of more complex future projects

Lower Organizational Impact

Lower Organizational Engagement Required

Higher Organizational Engagement Required

# CHANGE IS A MINDSET & SKILL THAT CAN BE LEARNED



The four key takeaways can help develop change management as a key competency of your team

1

## **Start with “Why” and engage the heart**

You must paint a compelling picture on why the change initiative is needed and it must resonate at an emotional level for your team to sustain their commitment to making it happen.

2

## **Develop your team’s ability to manage change**

Like any skill, developing the ability to manage through change can be taught. Remember, organizationally, change is a “team sport” and teamwork is critical for success.

3

## **Persevere, adjust and adapt along the journey**

While upfront planning is important, how you adapt to unexpected turns along the way is equally as important. When you meet resistance, it is usually fear based. Fear of the future and fear of change can be unsettling to people. Listen, but be confident in your vision.

4

## **Celebrate wins!**

Reinforce success, big and small. Acknowledge what your team has accomplished often. Enlist new ideas, which reinforces their ability to take emotional risks in sharing new, bold ideas.

# INNOVATION PROJECTS



## Grins 'n' Giggles

*Inclusive & accessible party place for kids*



## LeCoffee

*A micro-business enterprise*



## Internship Recruitment

*Partnering with colleges*



## Community Collaboration

*Sharing event & Meeting space*

# TAKEAWAYS FOR THE IDD SERVICES SECTOR



---

**Change will either happen *to you* or because of you. If not you, then who?**



---

**Act with a vision of the future you want, with passion compassion and determination**



**IF YOU ARE ENTRUSTED WITH BRINGING ABOUT CHANGE, YOU LIKELY POSSESS THE KNOWLEDGE NEEDED TO ADVANCE THE ORGANIZATION, AND YOU MIGHT HAVE A PLAN — BUT KNOWLEDGE IS NOT ENOUGH. YOU HAVE TO BRING *YOURSELF* TO EACH INTERACTION IN A DEEPLY AUTHENTIC WAY. PEOPLE DON'T CARE HOW MUCH YOU KNOW UNTIL THEY KNOW HOW MUCH YOU CARE.**

- Doug Conant

# QUESTION & ANSWER

# DISABILITY THRIVE INITIATIVE RESOURCES



- Lunch and Learn
  - Continue this conversation in a live, interactive session!
  - Friday, June 11th
  - 12:00 noon – 1:00 pm
  - Register now:

[LunchAndLearn.DisabilityThriveInitiative.org](https://LunchAndLearn.DisabilityThriveInitiative.org)

- Access the Resource Library and keep up with us:

[DisabilityThriveInitiative.org](https://DisabilityThriveInitiative.org)

- Sign up for email updates about the latest:

[SignUp.DisabilityThriveInitiative.org](https://SignUp.DisabilityThriveInitiative.org)

- Request technical assistance:

[DisabilityThriveInitiative.ZenDesk.com](https://DisabilityThriveInitiative.ZenDesk.com)

# JOIN US FOR OUR NEXT WEBINAR



## **Providing Inclusive Services to Bridge the Gap for the LGBTQ+ and Disability Communities**

Wednesday, June 23, 2021

3:00 – 4:15 pm

# THANK YOU!



**DISABILITY THRIVE INITIATIVE**  
*Alternative Services and Supports for the IDD Community*

We look forward to seeing you at future webinars.

Find this webinar and other resources at:

**[DisabilityThriveInitiative.org](https://DisabilityThriveInitiative.org)**

**[Info@DisabilityThriveInitiative.org](mailto:Info@DisabilityThriveInitiative.org)** | (916) 238-8811