

Change Management Guide for a Hybrid Workforce

Audience: People Leaders and HR

Definition of Hybrid: A combination of on-site, remote and both types of workforce that ensures effective business operations.

In this Guide, Leaders Will Find the Following:

- Summary of Topic
- Importance of Change (Research Findings)
- Recommended Actions

This Change Management guide is intended to be:

- **Scalable** – For use by any leader of staff at UC Irvine: top leaders (Vice Chancellors, Associate/Assistant Vice Chancellors, Deans, Assistant Deans, etc.), school/unit heads (Chairs, Department Heads), area leaders (Managers, etc.)
- **Easy to Use** – You can utilize the tables within this document, the Excel workbook guide, or the one-page worksheet

Summary of Issue (aka Change is Hard)

“... organizations don’t change, people do.” -- Tim Creasey, Chief Innovation Officer, Prosci

Even small changes can have large impacts: writing a new year on documents is a change we stumble over annually; we complain when the weather forecast changes; the University Drive construction caused repeated changes to our commutes and speculation over the completion date.

The success of a project or change is directly related to the application and effectiveness of change management. The relationship between project/change goals and its success lies in the amount of “people change” required to meet those goals. As we move to a hybrid workforce, nearly 100% of the success of this change is linked to people changing how they work.

Change can be disruptive and upsetting, especially when it involves your livelihood

The “work from home” status that was ordered in March 2020 (and the myriad impacts of the COVID-19 pandemic – remote learning, businesses closing, mask wearing, etc.) has likely been the largest change we have experienced in our lifetimes. It wasn’t easy or smooth.

As we move toward a “new normal,” it may be intellectually easy to envision but shifting our organization to a hybrid workforce will be another significant change to our lives. We can make this change much smoother.

Unlike the work-from-home change in March 2020, we can use the concepts of change management to plan for and guide the shift to a hybrid workforce. This will greatly increase the likelihood of success.

Change management is an approach to preparing, communicating, supporting, and helping individuals and teams successfully implement change.

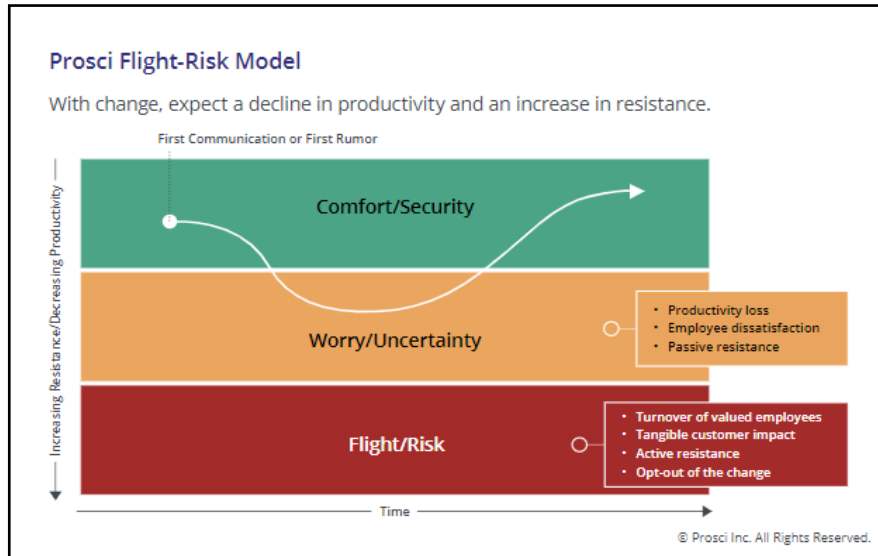
Recommended Viewing: “[What is Change Management?](#)” from Prosci, a leader in the change management field

Recommended Reading: “[Definition of Change Management](#)” from Prosci, a leader in the change management field

Why Is Change Management Important? (Research Findings)

Change starts with people, one person at a time

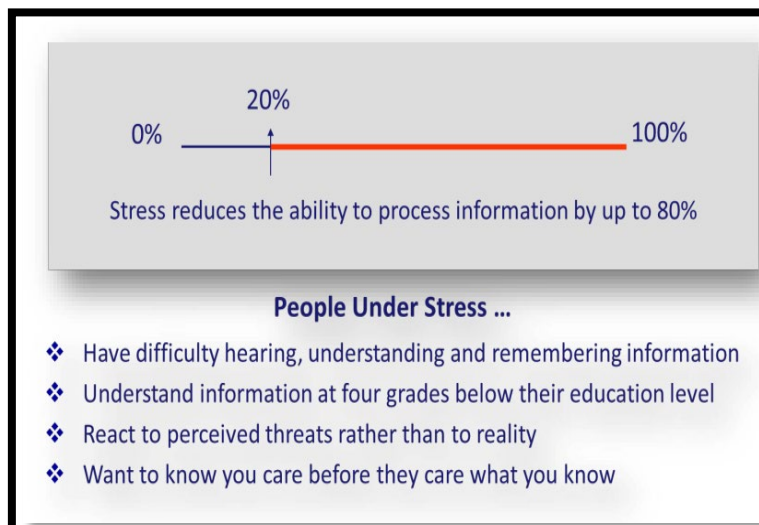
Numerous studies have shown that the total value created by a project is directly related to the application and effectiveness of change management. In order to contextualize the connection between change management and a project's success, look at the relationship between the intended outcomes of your project and the amount of people change required to achieve those outcomes. The bottom line is that 100% of our project outcomes are linked to people changing how they work.



Communication is Key

When people are under stress, their ability to process information is reduced by 80%

The absence of information foments distrust, disengagement, and rumors, which distracts us from our work and jeopardizes the success of our change. This is one of the reasons it is critical to communicate so extensively during change. Beyond extensive communication, consistent messaging will ensure everyone hears the same message and understands the new direction and how their work and behaviors will be impacted.



Recommended Actions

Implementing change management methods to help your unit shift to a hybrid workforce is not difficult, but it does take some thought.

This action plan focuses on three phases, which we will guide you through:

- Step 1. Prepare**
- Step 2. Manage & Communicate**
- Step 3. Reinforce**

Step 1. Prepare

We strongly recommend appointing a staff member to serve as your Change Management Champion for the change management aspect of shifting to a hybrid workforce and the impact that will have on your area.

Change Management Roles Defined	
Change Management Champion (ex. Business Manager, Communications staff member, Department/Unit Manager, etc.)	Leader (ex. Dean, Assistant Dean, Department Chair, Unit Head, etc.)
<ul style="list-style-type: none"> School/Unit employee; someone who understands the culture of the unit Partner with Unit HR staff and guide leaders through the change management process Ask questions (using this guide) to assist leaders by thinking through aspects that will change when their organization shifts to a hybrid remote work environment. Facilitate the change management process with work teams (depending on scope of project within school/unit) 	<p>As the campus moves to a hybrid workforce, we look to leaders to:</p> <ul style="list-style-type: none"> Implement change management methods to help employees through what could be a difficult time. Focus on the people, not just the output/function of your unit. Make communication with all stakeholders a top priority. Be active, visible and available, check in with your employees, listen, and ask how you can help. Remember, you may be going through challenges of transitioning yourself, so be patient and take care of yourself through the process.

Step 1.a. Understanding the Change(s)

Shifting to a hybrid workforce is likely not just one change, but several changes that may occur all at once or may happen in steps and increments. Each piece of the change needs attention and thought.

Goal: Articulate the change and why it is needed. Identify stakeholders.

What is the Project?	What is the Purpose?	What is Changing?	Who is Impacted by this Change?
<i>Explain the change.</i>	<i>Explain the purpose for the change and why it is happening now.</i>	<i>List what is changing.</i>	<i>List: stakeholder areas/work units, stakeholder individuals, stakeholders in other areas with which your school/unit/dept regularly interacts, others. Ex. facilities, accounting, faculty, students, etc.</i>

Step 1.b. Understanding the Impact

Using the “Who is Impacted by this Change” from above, think through what is changing for each unit/person.

Goal: Understand the specific changes for each stakeholder and identify potential challenges to stakeholders’ desire to support and participate in the change.

Who is Impacted by This Change?	What is Changing?	How Big is This Change?	What are the Challenges?
List each unit or individual stakeholder (from above).	Think about aspects of change for each of your stakeholders. Examples include: processes; systems; tools; equipment; job roles; behaviors; mindset/attitudes; reporting structure; location.	Aspects of the Change Are: 1 = Minor 2 = Moderate 3 = Major	For each of your stakeholders, what types of resistance do you anticipate? Examples include reluctance to use new tools; lack of participation in team activities or meetings; spreading misinformation.

Step 1.c. Resistance Mitigation Plan

After thinking through the resistance/challenges that your change might be met with, what steps will you take to mitigate those challenges to increase your stakeholders’ desire to support and participate in your change?

Goal: Plan for mitigation of challenges to stakeholders’ desire to support and participate in the change.

Who is Impacted by This Change?	Action?	Due Date	Additional Information About the Mitigation Plan (e.g. Action Steps)
List each unit or individual stakeholder (from above).	What action(s) should be taken? Examples: - Rebuild trust - Increase transparency	When must this action be completed?	Additional Information about the Plan.

Step 1.d. Training Plan

Goal: Ensure stakeholders have the ability to make the change.

What is Changing?	Who Needs to be Trained?	Training Coordinator	Due Date	Training Resource
What new process, system, tool, equipment will be implemented that requires training?	List each unit or stakeholder who needs to be trained.	Who will schedule the training and ensure it is completed?	When must this training be completed?	How will the training be conducted? Who will provide the training?

- **TAKE-AWAYS from Step 1:** *The most important thing is that you spend some time thinking about these questions - whether you use the tables in this document, the Excel guide, the one-page worksheet, or some other tool.*

Tips for Managers:

- The relationship between project/change goals and its success lies in the amount of “people change” required to meet those goals.
- Change is disruptive; applying change management methods can mitigate this and increase success.
- Ask yourself: Have you ever been asked to make a change when you didn’t know why a change was needed? How did that make you feel?

Step 2. Manage and Communicate

By understanding the change and the impact, you can tailor your approach for a successful change outcome. The goals for making this plan are to ensure:

- Reinforce that decisions about any changes are based on business needs
- Clear and consistent communication about the change
- Care and consideration (not condescension) given to the specific needs of each unit/person impacted by the change

All it takes is a little planning and a lot of communication

Even if you do not anticipate resistance, even if the changes are “small,” even if you believe your team does not need increased/different communication: **change management and communication is critical**.

Tip for Managers:

- Enlist a staff member who is interested in/good at communicating to increase their engagement and professional growth.
- Continuously solicit feedback from staff, as their needs and concerns may change. Encourage staff to share and ask questions.

a. Critical Components

- Communicate early and often
- Ask staff for feedback
- Use consistent messaging
- Communicate with your unit leaders and set expectations (and ensure consistent messaging)
- Be sensitive to any ongoing bad feelings surrounding past change implementation
- Be aware and sensitive to personal situations and levels of risk-tolerance
- Respond to feedback

b. Critical Messages

- WHO
 - Consider who should receive messages – not just those “directly” impacted
 - Who delivers the message is important - the right people sending the right message builds trust and reinforces culture
- WHAT
 - Tell them what to expect, specifically and clearly
 - Define what successful change looks like for your team; make calls to action clear
 - Put the changes in a broader context
 - Do not use email for high-stakes communications
- WHEN
 - More often than your initial instinct tells you (over communicating is better than under communicating)
 - Do not communicate only when there is “big” news
- HOW
 - Tailor according to audience and message (emails, meetings: one-on-one, teams, skip-level, town halls, etc.)
 - Dedicate a portion of meetings to listening
 - Acknowledge and validate feelings
 - Address rumors and misinformation clearly but tactfully

c. Meetings

Set up recurring communications with team members:

- Bi-weekly or monthly one-on-one meetings with each team member
 - Ask how they are doing
 - Ask if they have questions
 - Solicit feedback, encourage participation in the process
 - Address any concerns with empathy and patience
 - Discuss any priority assignments/work that requires immediate support
 - Discuss what success looks like, and what your expectations are

- Team meetings
 - Consider adding team lunches and other informal venues for building rapport and relationships.

d. Communications Plan

We strongly recommend contacting your school/unit communications team prior to creating a communications plan to ensure messaging is coordinated with Campus and Senior Leadership in your school/unit.

Goal: To plan for timely and relevant communications with all stakeholders to ensure stakeholders' desire to support and participate in the change.

Message	Audience	Messenger	Method	Timing (Due Date)
<i>What needs to be communicated</i>	<i>What stakeholders need to hear the message?</i>	<i>Who should deliver the message?</i>	<i>How should the message be delivered?</i> <i>Tip: High stakes messages are best delivered in-person (or zoom)</i>	<i>When should the message be delivered?</i>

➤ **TAKE-AWAYS from Step 2:** Communicate, communicate, communicate. And listen.

Tips for Managers

- *Be good to your word or risk eroding trust and stability.*
- *Focus on the people, not just the output/function of your unit.*
- *Understand that people need to talk about this to help support each other.*
- *Be visible, active and available, check in with your employees, listen, and ask employees how you can help. Simple gestures like listening and checking in with people go a long way.*
- *Recognize how the changes affect you as well. Be patient with yourself and others.*

Step 3. Reinforce

One of the biggest risks in change is that the change does not “stick.” Once the change(s) has happened, it is still critical to review your change management plan and to keep communicating.

a. Reinforcing Change Actions

- Assess adoption of change

- Continue to solicit feedback
 - Continue asking “What do you need?”
- Reinforce/offer ongoing support and trainings
- Celebrate successes
- Continue to establish relationships with your team, including finding ways to help them connect with each other
- Provide feedback and coaching for each employee individually
- Manage your managers. Guide them through the process – coach and mentor good change management habits and use the opportunity to build rapport

Goal: Sustain the new behavior / performance until it is no longer considered a change.

Action Owner	Action	One-Time or Recurring?	Stakeholder(s) Impacted	Due Date
<i>Who will be responsible for taking this action?</i>	<i>What reinforcing action(s) will be taken?</i>	<i>Will this action occur once or is it intended to be recurring? If it will be a recurring action, on what frequency?</i>	<i>Who are the Stakeholders for whom this action is intended to impact?</i>	<i>What date is the reinforcing action due?</i>

- **TAKE AWAYS from Step 3:** Once a change has been made, it’s not “over and done.” Change management includes reinforcement and reassurance.

Tips for Managers

- *Have you scheduled/are you having one-on-one meetings?*
- *Have you scheduled/are you having group meetings with your team?*
- *Do you have a clear sense for who is struggling with the change and may need extra support? Have you acted on that knowledge yet with coaching, EAP or other support services?*
- *Have you set appropriate expectations regarding work performance?*

- **Extra Tool:** The next two pages feature easy “What to Do” and “What NOT to Do” cheat sheets from our sister campus, UC Berkeley.

Best Practices for Leading Change – What to Do

Provide information, what you know, what you don't, when to expect updates. – Employees need all available information to make realistic assessments and effective plans. Share what information you have when you have it: what is changing, what is not, what is known, what is unknown, when to expect updates.

Display a positive attitude – As the leader, you are in a position of great influence. In a sense you are your team's North Star. Even if you are not yet fully onboard with the change, display to your team an attitude that is unbiased and welcoming of feedback.

Stay connected to your team – Focus on team goals, foster support, monitor functioning, and celebrate achievements.

Re-recruit people – Reiterate to each team member their value, and your desire to have them remain on the team and support the change.

Surface issues and concerns – Show empathy; help employees reframe their personal response to the change so they can effectively manage their own personal resistance

Provide more structure – Define short-term objectives, time frames, priorities, and standards to help your team regain its equilibrium

Protect quality and customer service – Service standards must remain high.

Delegate – Continue delegating work tasks while remaining mindful of each employee's emotional stage and providing them relevant support.

Empower – As appropriate, give employees more influence in day to day decisions. Determine the appropriate level of authority to assign by considering an employee's current emotional stage, level of experience, capability, and the task itself.

Raise the bar – Provide challenging assignments and coach employees to grow and develop their skills

Recognition – During change it is especially important to show appreciation and provide acknowledgement for work well done.

2-way communication – Be honest about what you can't say or don't know, and be open to hearing feedback.

Inform/update higher management – Provide candid feedback on the change as it relates to the work and its impact on the people. This ensures leadership has the information needed to make informed decisions

Practice the 4 Vs:

This is not a change strategy by itself, rather a piece of a larger strategy, or a tool, to use at the very moment the change goes live.

- **Visibility** – Be visible, available and interested in your employees during this time. Brief check-ins will leave employees feeling supported and valued.
- **Variability** – Allow for varying personal reactions (see Kubler-Ross grief cycle model, pages 17-19) and give employees more flexibility at work to take care of themselves.
- **Ventilation** – allow opportunities (both formal and informal) for employees to tell their stories, compare their reactions, and express their feelings. Productivity may decrease initially; however, allowing ventilation can expedite getting back to a focus on work.
- **Validation** – say thank you and acknowledge employees for their contributions. Special recognitions and verbal encouragements go a long way in challenging times.

Change Management Toolkit, Berkeley, University of California, Staff Learning and Development

Best Practices for Leading Change – What NOT to Do

Don't censor information or hold back until everything is known

Employees need all available information to make realistic assessments and effective plans. Share what information you do have, when you have it even if the information you have is not complete.

Don't express cynicism

Employees look to you as a role model and need your support and constructive guidance.

Don't be unrealistically positive

Don't be Pollyanna... acknowledge when things are difficult.

Don't isolate yourself

Employees need access to you to feel supported. Use employees' cues to know when to become more involved and when to back off.

Don't expect employees to all react the same way at the same time

Employees respond to the same situation differently (see Kubler-Ross grief cycle model, pages 17-19).

Don't enable resistance

Enabling is an action you take that protects the employee from consequences of his/her actions and actually helps the employee to not move through the change process. Examples of enabling include:

- **Covering Up**
Providing alibis, making excuses or even doing someone's work for them rather than confronting the issue that they are not meeting expectations.
- **Rationalizing**
Developing reasons why the person's behavior is understandable or acceptable.
- **Withdrawing/Avoiding**
Avoiding contact with the person whose behavior is problematic.
- **Blaming**
Blaming yourself for the person's continued challenging behavior or getting angry at the individual for not trying hard enough to improve their behavior or to get help.
- **Controlling**
Taking responsibility for the person by significantly changing their environment or trying to minimize the impact by moving them to a less important job.
- **Threatening**
Saying that you will take action (i.e. formal disciplinary action) if the employee doesn't improve, but not following through.

Change Management Toolkit, Berkeley, University of California, Staff Learning and Development