



# Everyone Ready®

Achieve more when *everyone's*  
ready for volunteers

FROM ENERGIZE!

---

## Online Seminar Trainer's Handouts

### Managing Change (and Dealing with Resistance to It!)

Trainer: Connie Pirtle

#### Contents:

Stages of Change	<i>page</i>	1
Developing Your Empathy IQ	<i>page</i>	2
Sample Structured Feedback Questions	<i>page</i>	3
Accepting or Resisting Change	<i>page</i>	4
Preparing for Volunteer Resistance to Change	<i>page</i>	5
Tips to Manage Change Effectively	<i>page</i>	6
Change Management Plan	<i>page</i>	7
Change Management Timeline	<i>page</i>	8
Additional Resources on Managing Change	<i>page</i>	9
About the Trainer	<i>page</i>	11

# Stages of Change and How they Apply to Volunteers



In the late 1950s, Professor Ronald Lippitt, a behavioral scientist, identified seven stages of change that people move through when faced with a new situation. Lippitt confirmed that everyone moves through the change process at different paces. For small changes, we may move through all seven steps sequentially and quickly. For larger, more difficult changes, we often move through the steps more slowly and we even bounce around among the steps, sometimes returning to one or two stages, say disbelief or guilt, over and over. Professor Lippitt's work continues to be the gold standard for understanding change and how to manage it.

The **shock stage** is most often expressed as surprise at the announcement of a change. Volunteers express their shock that a change is even being considered, let alone implemented. In other words, they didn't see it coming. Shock is to be expected among volunteers if they haven't received any indication that a change is imminent. It is also a natural reaction to that very first communication that even suggests change is happening.

The **disbelief stage** is literally just that. Volunteers can't believe that the change is occurring. For example, volunteers can't believe that a program or area they work in is being discontinued. They are *sure* it can't be true!

The **guilt stage** is when volunteers blame themselves for the change. Let's say that the volunteer program manager is leaving the institution for another job. Volunteers will often blame themselves for this change, wondering if the program manager doesn't like them any more or if they did something to make the manager leave.

The **projection stage** is sometimes called the "blame game" where volunteers blame the board of directors or senior staff for the change. They are sure it is someone's fault that the change is being made, rather than a necessary and productive action. For example, a board of directors blames all elected officials for the strict rules of background checks for volunteers working with children. They feel the policy places an undue burden on the budget of the organization.

The **rationalization stage** occurs when volunteers work to rationalize why the change is being made. This is an important stage because it's when volunteers "try out" the idea for themselves. Let's say that a volunteer has been moved to a new work space. He or she will look at the space, even sit in the chair, and begin to think about what it will be like to work in the new space.

The **integration stage** happens when that volunteer is actually working in his or her new work space. He or she still may not be happy about the change, but are willing to try it. Occasionally there is still grumbling about the change at this stage.

Finally, we reach the important **acceptance or rejection stage**. Volunteers have accepted the change and are implementing it effectively. Some will even applaud the change as brilliant. Others will accept it but not think it was brilliant. And some won't accept it at all. Not everyone can make the change and you may even have some volunteers leave the program, depending on the nature of the change.

Lippitt, Ronald, Jeanne Watson, and Bruce Westley. *The Dynamics of Planned Change: A Comparative Study of Principles and Techniques*. (New York: Harcourt, Brace, 1958)

# Developing Your Empathy IQ

*Analyzing Potential Resistance to Change*



## Planned Change:

### 1. Which volunteers will be most affected by this change?

- What is the demographic profile of these volunteers?
- How long have they been volunteers?
- What are their areas of responsibility?
- What is my relationship to them?
- Have they been affected by change in the past at my organization? If so, how did they respond?

### 2. What might be the possible reactions of these volunteers to this change?

- How are they most likely to respond to the pending change?
- Is their reaction likely to be to the change itself or to uncertainty about what might come after?

# Sample Structured Feedback Questions



Soliciting volunteer feedback is an important step in effective communication during a change process. But this is more than the query: “Are there any questions?”

**Structured feedback** involves asking specific questions that will get volunteers’ emotional issues out on the table, allow you to work through them, and then get volunteers engaged in implementing the change successfully.

- How do you feel about the change?
- Who will be affected by the change?
- What can I do to make the change occur more smoothly?
- What can you do to make the change occur more smoothly?
- Who needs to know about this change?
- What is the message we want them to hear?
- What are the potential positive outcomes of this change?
- What are the potential negative ones?



# Accepting or Resisting Change

## ***Common Reasons for Volunteers to Resist Change***

Among volunteers there are some *common reasons to resist change*. It's important to identify exactly why someone is resisting change in order to help them move, if possible, toward accepting the change.

- **Tradition is threatened.** You may hear long-term volunteers say, "We've always done it this way." Volunteers often are concerned that valuable institutional history or volunteer accomplishments will be lost with a change. Volunteers can be threatened about losing their identity or even power within an organization when change is made.
- **Change can be perceived as illogical,** for example the costs of a new activity or program seem greater than the benefits. This occurs most often when volunteers don't know the reasons for the change or don't fully understand the greater benefits to the institution. Your communications with volunteers need to include why the change is being made and the benefits to the organization as well as to the volunteers.
- **Change can be perceived as self-serving.** Volunteers often ask, "Who's promoting this change?" or "Is there a personal benefit with this change?" Provide honest answers to these questions and don't ignore them.
- **The change lacks clear intention and direction,** at least to the volunteers. Change often evolves slowly, particularly in nonprofit organizations. Rarely are all parts in place at the very beginning. Having a written plan for change and involving volunteers in implementing the change will provide the direction and guidance that volunteers seek.
- **Change brings fear of the unknown.** This fear can produce a reluctance to trade the known, the way things are now, for an uncertain new way of doing things. Effective communication about the change management plan is essential to lessen the fear of the unknown. Once volunteers know what to expect and when, they can become more comfortable with the idea of the change.
- **Volunteer positions and power can be threatened.** Will the change bring reorganization? Will power positions change? Who will I work with now? Again, communication is essential to neutralize this type of resistance. Be honest but positive about why the change is necessary, what is going to happen, how and when it will happen, and the benefits to everyone once the change is accomplished.

## ***Common Reasons for Volunteers to Accept Change***

Just as there are common reasons to resist change, there are also *common reasons for volunteers to accept change*. Acceptance most often occurs when:

- **The change is logical and its merits are understood.** This means that you've done a good job of communicating the change management plan.
- **Volunteers support the change when they are involved in it.** This means that you have solicited feedback from volunteers and involved them in the steps to implement the change.
- **The change is non-threatening.** This means that you have communicated clearly the reasons for the change and the anticipated results. Volunteers understand their role in the change and exactly how the change will impact them.
- **The intention of the change is very clear.** Again, you've communicated with volunteers from the very beginning, back when you knew that change was even being considered. In this way volunteers will feel the change is being made "with" them and not "to" them.

# Preparing for Volunteer Resistance to Change



You're getting ready to introduce a new idea or a change in procedures that all volunteers use. Volunteers will deal with their own resistance either by breaking it down, avoiding it, or dismissing it entirely. You can prepare in advance for resistance.

- **Be enthusiastic about the change.**  
Excitement and novelty is contagious and can minimize some opposition. But, be realistic with your enthusiasm. If you have allowed certain volunteers to avoid using the computer because they weren't comfortable with it and now you want to change that, remember that those volunteers will undoubtedly find this change threatening and uncomfortable. Don't gloss or enthuse over their concerns in an attempt to be positive about the change. Empathize with their concerns, listen to them, and ask how you can move toward change together.
- **Empathize with resistant volunteers.**  
Explore their fears. Get specific information about their objections and preferences. Ask "how" or "what" and *not* "why." Remember, the change process is a continuum and you are much further along in the process than they are.
- **Get resistance out in the open.**  
Make it safe for volunteers to voice their opinions and objections. Don't belittle a volunteer who is resisting change. Provide productive opportunities for them to express their concerns. Depending on the depth of resistance, you can often bring out volunteer concerns in group feedback sessions. Other times you may find it necessary to listen to volunteers individually to encourage their feedback and address their concerns.
- **Respect the resistance.**  
By respecting a volunteer's thinking you build self-esteem in the other person and create an environment where it is acceptable to disagree. Arguing, being defensive, or engaging in counter-attacks will never move a volunteer to accept change. Check with them throughout the change process to learn if their objections have lessened. This way you will know where they are in the change process and you can identify where more attention is needed.



## Tips to Manage Change Effectively

1. Set the tone – be positive and realistic.
2. Begin with the facts – make a clear case for why the change is being made.
3. Involve those staff and volunteers who are directly affected in the decision-making and/or change management process.
4. Identify change agents among volunteers to help support the change.
5. Create an advisory group, task force, or change steering committee to identify the resources (financial, human, skills, space, equipment, new policies, etc.) necessary to make the change and to help implement the change.
6. Identify and share incentives for change – the benefits of the impending change.
7. Collaborate – work with other staff and volunteers to make the change happen.
8. Create a written action plan to implement the change.
9. Communicate, communicate, communicate.
10. Celebrate both the past and the future.

# Change Management Plan



Change being made: \_\_\_\_\_

\_\_\_\_\_

Why change is being made: \_\_\_\_\_

\_\_\_\_\_

Who will the change affect? The most? The least? \_\_\_\_\_

\_\_\_\_\_

Benefits to volunteers once change is made: \_\_\_\_\_

\_\_\_\_\_

Anticipated challenges: \_\_\_\_\_

\_\_\_\_\_

Resources required:

Human: \_\_\_\_\_

\_\_\_\_\_

Financial: \_\_\_\_\_

\_\_\_\_\_

*(continued on next page)*



# Change Management Timeline

Action Step	Timing	Who's Involved	Stage of Change	Notes

# Additional Resources on Managing Change



## Other Relevant *Everyone Ready* Resources

Organizational members can go to the “All Topics” section of your Main Page (located on the right in the orange sidebar) and use the search/sort functions to get to these archived topics:

- *Building and Sustaining Strong Volunteer Leadership*. Online Seminar by Carol Weisman
- *Educating Up: Gaining Executive Support for Volunteer Engagement*. Online Seminar by Susan J. Ellis
- *Handling Challenging Behavior by Volunteers*. Online Seminar by Steve McCurley
- *Keeping Volunteers Motivated (So They Stay!)*. Online Seminar by Betty B. Stallings
- *Middle Managers: Their Vital Role in Volunteer Success*. Self-Instruction Guide by Susan J. Ellis
- *OUR Volunteers: The Management Team Approach to Enhancing Volunteer Engagement*. Self-Instruction Guide by Betty B. Stallings

## Books

(Save money and purchase books shown below with links in the Energize, Inc. Online Bookstore using your Everyone Ready discount code – find the code on your Everyone Ready Main Page.)

Ellis, Susan J. *From the Top Down: The Executive Role in Successful Volunteer Involvement*, 3rd. ed. Energize, Inc., 2010. [https://www.energizeinc.com/store/top\\_down](https://www.energizeinc.com/store/top_down)

Gann, N. *Managing Change in Volunteer Organizations*. Open University Press, 1997.

Hesselbein, Frances and Marshall Goldsmith (eds.). *The Organization of the Future 2: Visions, Strategies, and Insights on Managing in a New Era*. San Francisco: Jossey-Bass, 2009.

Lippitt, Ronald, Jeanne Watson, and Bruce Westley. *The Dynamics of Planned Change: A Comparative Study of Principles and Techniques*. New York: Harcourt, Brace, 1958.

McCurley, Steve and Rick Lynch. *Keeping Volunteers: A Guide to Retention*. Olympia: Fat Cat Books, 2004. [https://www.energizeinc.com/store/keeping\\_volunteers](https://www.energizeinc.com/store/keeping_volunteers)

McCurley, Steve and Sue Vineyard, *Handling Problem Volunteers: Real Solutions*. (Downers Grove, IL: Heritage Arts, 1998).  
[https://www.energizeinc.com/store/handling\\_problem\\_volunteers](https://www.energizeinc.com/store/handling_problem_volunteers)

Murray, Anne Firth. *Paradigm Found: Leading and Managing for Positive Change*. New World Library, 2006.

Wilson, Marlene. *Visionary Leadership in Volunteer Programs: Insight and Inspiration from the Speeches of Marlene Wilson*. Philadelphia: Energize, 2008.  
[https://www.energizeinc.com/store/visionary\\_leadership\\_volunteer\\_programs](https://www.energizeinc.com/store/visionary_leadership_volunteer_programs)

## Articles

(Access e-Volunteerism articles through your Everyone Ready Main Page.)

Ellington, Jane and Chris Jones. “Becoming Friends: How Two Former Competitors Merged.” *e-Volunteerism*, Volume 1, Issue 3, Apr. 2001.



- Fryar, Andy, ed. "Keyboard Roundtable: The Changing Environment of Volunteers in Health Care." *e-Volunteerism*, Volume VIII, Issue 2, Jul. 2008.
- Fryar, Andy, ed. "Keyboard Roundtable: Volunteers 'Aging in Place'." *e-Volunteerism*, Volume V, Issue 4, Jul. 2005.
- Fujie, Gwen. "Tongue-Fu! for Volunteers and Volunteer Managers: How to Deflect, Disarm and Defuse Verbal Conflict." *e-Volunteerism*, Volume VIII, Issue 1, Oct. 2007.
- Keyboard Roundtable. "Helping Volunteers through Stressful Situations." *e-Volunteerism*, Volume V, Issue 2, Jan. 2005.
- McKee, Thomas W. "How to Unleash the Visionary Volunteer Without Destroying the Organization: What do you do with visionaries who are always thinking (and acting) outside the box?" <http://www.volunteerpower.com/articles/Visionary.asp>
- Mook, Laurie. "Bridging the Gap: Research into Volunteer Changes." *e-Volunteerism*, Volume XI, Issue 3, Apr. 2011.
- Quaggiotto, Giulio. "Managing Change for the Better." <http://www.eimagazine.com/xq/asp/sid.0/articleid.C1DCE04E-90FB-4A7F-BCA4-67D5382A34D5/qx/display.htm>
- Rehnborg, Sarah Jane. "Coping with Change: An Experiential Exercise." *e-Volunteerism*, Volume II, Issue 3, Apr. 2002.
- Stallings, Betty B. "Designing a Strategy for Persuasion." *e-Volunteerism*, Volume III, Issue 2, Jan. 2003.
- Stallings, Betty B. "Keeping Volunteers Engaged During Organizational Change: A Tool for Successful Transition." *e-Volunteerism*, Volume V, Issue 3, Apr. 2005.
- Stallings, Betty B. "Why Won't They Change?" *e-Volunteerism*, Volume III, Issue 4, Jul. 2003.

## Web Sites

### **Change Management Guide: The People Factor**

<http://work911.com/managingchange/index.htm>

Free materials on the fundamentals of being a change leader.

### **Change Management: Strategies to Help Nonprofit Leaders Make the Most of Uncertain Times**

<http://www.tccgrp.com/pdfs/changemanagement.pdf>

Briefing paper prepared by TCC Group.

### **Managing change: A guide on how to manage change in an organisation**

<http://www.oursouthwest.com/SusBus/mggchange.html>

Free guide from the UK, including the "Change Management Matrix" (also provided as a stand-alone single page document) to use as a diagnostic tool and route map.

### **Strategic Options in Managing Change**

<http://www.diycommitteeguide.org/article/strategic-options-managing-change>

Site developed by the Northern Ireland Volunteer Development Agency, with a range of worksheets and articles.

## About the Trainer



**Connie Pirtle**, president of Strategic Nonprofit Resources, serves nonprofit organizations in all areas related to volunteerism. She has more than 20 years of experience working with trustees, volunteers, volunteer program managers, executive directors, and senior staff members on effective utilization of volunteer resources.

Connie has lectured at the Georgetown University Center for the Study of Voluntary Organizations and Service, and has been an instructor for Portland State University's onsite Volunteer Engagement and Leadership Program. She has published papers and articles in *The International Journal of Volunteer Administration* and *Nonprofit and Voluntary Sector Quarterly*.

Connie is an active volunteer, serving as an editorial reviewer for the *International Journal of Volunteer Administration*; member, Advisory Council, Stillwater CARES, Inc. (OK); member, Advisory Board, Big Brothers Big Sisters (OK); and an online nonprofit career counselor for The Women's Center in Vienna, Virginia.

Contact Connie at:  
Strategic Nonprofit Resources  
314 E. Marie Drive  
Stillwater, OK 74075  
(202) 306-1492  
[AskConnieP@cs.com](mailto:AskConnieP@cs.com)