



OLD BARKER ASSOCIATION

OBA Change Management Plan

Support for Life Online Program Implementation



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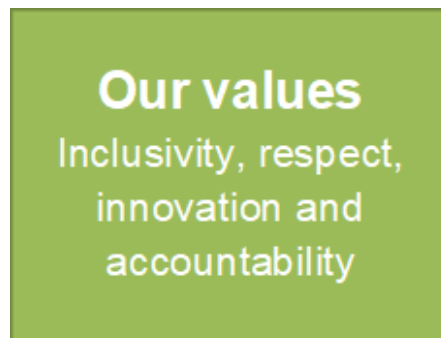
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Introduction

The Old Barker Association (**OBA**) is an alumni association for ex-students of Barker College, with over 18,000 members. Our vision is to be the premier alumni association in Australia, guided by our values of inclusivity, respect, innovation and accountability (Old Barker Association, 2021).

As part of the services the OBA provides, the Support for Life (**S4L**) program is a free counselling service for members and their families. Launched in 2018, its purpose is to provide immediate support for members and their family experiencing mental health challenges, with the OBA's connection with the school providing a personal and supportive connection for members to access help.

To deliver this program, the OBA contracts a local counsellor to conduct face-to-face counselling sessions services near the school. The program offers all members up to three free sessions, with further sessions provided based on the advice of the counsellor and the S4L program manager within the OBA. These sessions are intended to provide immediate support, with long term treatment options progressed through the Medicare or private system.



Our case for change

While the existing S4L program has been broadly supported by members and their families who have accessed the service, the current delivery model relies on a person being able to access the service on Sydney's North Shore during business hours. This has meant many members have been excluded from accessing this important service.

The change proposed is to shift from a face-to-face counselling service delivered by a single contractor to an online model. Shifting to an online model will broaden the times a person can access the service, as well as make it easier for members from across Australia to access the service. This will make the S4L program more scalable to meet the needs of our growing membership base. Online delivery of mental health treatment has proven to be successful in other organisations (Wind & Riper, 2020).

The proposed change is also intended to broaden the types of counselling services that can be offered through the program by engaging a provider that offers specialised counselling services in areas the OBA's members have identified as areas of concern, including substance abuse, financial stress and family issues. This would replace the reliance on a single general practitioner to provide treatment outside of their expertise. Finally, the OBA is also looking to ensure its S4L existing budget can be used as effectively as possible, by reducing overheads (e.g. room hire, insurance) to redirect these funds into more counselling sessions for our members.

Following endorsement by the OBA's board, this change management plan sets out the OBA's change process to shift the S4L program from a face-to-face to an online delivery model using the Kotter 8-stage model (Kotter, 2007). This plan is intended to ensure transformational readiness (Armenakis & Harris, 2002), support our members make sense of the change (Kezer, 2013) and deliver a S4L program that is fit for the needs of our members.

Case Study – Michael* (Name changed for privacy)

Michael has been a member of the OBA for 13 years and currently lives in Canberra. During COVID, Michael's catering business faced significant downturn and he had to lay off most of his staff.

Michael's old school mates were concerned for him and wanted help. They reached out to the OBA to see it could give them the tools to support Michael.

Unfortunately Michael's friends were also based in Canberra and could not access the S4L program. The S4L program also did not have financial counselling services at the time.

THE OBA MUST DO BETTER

Our vision

By September 2023, we will deliver an online counselling service that all OBA members want to, and can, use.

Change approach – Kotter’s Eight Steps

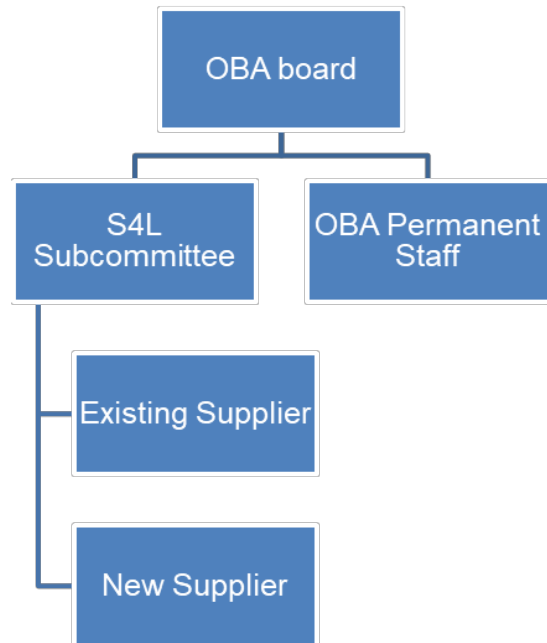
Program Manager / Product Owner: OBA board

Change Lead: Chair of OBA S4L Subcommittee

Date: The change will be implemented by 1 September 2023.

Project approach summary:

The S4L Subcommittee has secured funding from the OBA board for up to \$35,000 p.a. for the next three years to contract with an external provider to deliver online counselling services to OBA members. It is proposed to engage with an existing provider (to reduce capital costs, such as building a platform) who offers a range of counselling services rather than work with the existing supplier to build an online capability. These services must be accessible 7 days a week to members anywhere in Australia.



Step 1: Create a sense of urgency

The current delivery model indirectly excludes members seeking mental health support by limiting access to those who can travel to northern Sydney. If the S4L program delivery approach is not changed, members who need mental health support may not get it. The OBA may also be criticised for delivering a service that is only accessible to a small segment of its membership. The sense of urgency seeks not to amplify any resistance but, as seen in Step: 5, prioritise communication and strategies for support (McLaren et al , 2023).

Shifting to an online delivery model will enable members to access mental health support when they need it, with customised support depending on the needs of the member.

Create a sense of urgency – What needs to be done:

- Analyse member uptake of existing service and member sentiment on their ability to access the service.
- Clear messaging on the need for change to our members, particularly those who have accessed the face-to-face service and may be resistant to change. See [Stakeholder Engagement Plan](#)

Step 2: Build a guiding coalition

The change management team will be the OBA S4L Subcommittee. The Chair of the Subcommittee will be empowered to drive the change process, including working closely with permanent staff who support the program, seeking out supporters from the membership base to be part of the change process and proactively engaging with those who may be resistant to change (see [Stakeholder Engagement Plan](#)). This guiding coalition will be situated within the S4L Subcommittee.

The OBA board has authorised the Subcommittee to lead this work after it initiated this project and identified how the project would align with the OBA's 2021-2024 Strategy (Old Barker Association, 2021). The authorising environment will ensure the Subcommittee is empowered to drive this reform as a bottom-up approach to ensure those closest to our members are entrusted with co-designing and implementing a service that meets the needs of our members (Grant, 2003).

Build a guiding coalition – What needs to be done:

- Engage with key stakeholders (see [Stakeholder Engagement Plan](#)) to understand levels of support for the change process.
- Chair of Subcommittee to sit down with existing supplier of face-to-face services to understand what is required to get her to support transition to new model.
- Co-design strategic vision of change and communication approach with guiding coalition at change workshop chaired by Chair of Subcommittee.
- Seek out support from other organisations that run online counselling services for their members/staff to capture lessons learned and leverage their experiences to show change process can be successful.

Step 3: Form a strategic vision

Our vision is by September 2023, we will deliver an online counselling service that all OBA members want to, and can, use. We have heard that our members love the service but are frustrated that they cannot access it. Our approach must be focused on capturing this mood and presenting it in a way that can be delivered by the change team.

Form a strategic vision – What needs to be done:

- Proposed strategic vision should be tested with the guiding coalition once the situational analysis of member use of S4L and sentiment tracking is conducted.
- Guiding coalition settles desired future state, with proposed success measures. See draft [We will know we are successful when](#) below.

Step 4: Communicating the vision

We will communicate the need for change and our strategic vision to stimulate “social sharedness” (Stam et al. 2014) through engagement material across all our existing platforms, including email, OBA magazine, social media and face-to-face events.

Our communication approach will be co-designed with our guiding coalition and tested with members who have used the face-to-face S4L program, and those who have indicated an interest in understanding more about the program.

Communicating the vision – What needs to be done:

- Design a dedicated communications and engagement strategy for members who have accessed face-to-face service, with focus on proactively managing resistance. See [Stakeholder Engagement Plan](#) below.
 - Internal marketing through re-brand S4L and launch new program through OBA events, supported by social media coverage to amplify impact.
 - External marketing by advertising S4L initiative through existing media and social media, and increased exposure at non-Sydney events
 - Profile strategic vision in article in OBA magazine to draw attention to members.
 - Continued monthly updates to OBA board by the chair of S4L Subcommittee.
- Design a dedicated communications and engagement strategy for members who have accessed face-to-face service, with focus on proactively managing resistance. See [Stakeholder Engagement Plan](#) below.

Step 5: Removing obstacles

With the proposed shift to online, we will need to manage the transition of existing users of the face-to-face delivery to ensure their hesitancy does not become opposition. The guiding coalition will engage with these members to understand level of resistance and work to minimise the impact of this resistance on change process.

The S4L Subcommittee will need to design flexibility into its change process to ensure that ongoing mental health support to these members is prioritised. This may involve transitioning these members to the new online service over time (rather than immediately) by retaining a residual face-to-face service for those already using it.

Case Study – Emily* (Name changed for privacy)

Like Michael, Emily struggled during COVID. Emily moved to London after university for work 6 months before COVID. She struggled to build networks during lockdown and was experiencing depression. Under the existing S4L delivery model, Emily will have to find help herself.

Under the new S4L delivery model, Emily will be able to set up an online counselling session at a time that works for her, with an Australian counsellor paid for by the OBA.

THE OBA WILL DO BETTER

Work will need to be carried out to deliver a funding model that supports the new state, noting that the online service will likely drive increased demand for the service, in turn increasing the overall cost of the S4L program. This will be progressed through a standalone financial strategy developed by the Subcommittee.

Resistance

The key cohort that will need to be supported through the change is members who have accessed the face-to-face counselling sessions that are still accessing this service and have built a relationship with the current counsellor. Existing users are likely to be concerned that the change will impact their treatment. The existing supplier has identified she cannot deliver her services online and cannot expand the number of hours she works, or where she works from. She has indicated support for the change, contingent on her existing clients receiving appropriate support.

The OBA board has indicated they are willing to accept a level of resistance but need to ensure that existing users are provided appropriate support to transition to new model. The OBA recognises the power imbalance between the OBA and vulnerable members accessing services and will focus on ensuring these members are provided appropriate support throughout the change process (Fleming & Spicer, 2014).

While every effort should be provided to support the transition of these members to the online model, the OBA is encouraged to offer a sense of continuity to these members to enable them to maintain the relationship they have built with the current provider. This will include:

- Involving existing supplier and users in the design of the new platform.
- Developing communications material that shows existing users in the future state – showing continuity of their experience.
- Flexibility for existing users to continue to access face-to-face services over first 12 months.

Removing obstacles – What needs to be done:

- Chair of S4L Subcommittee to work with existing counsellor and OBA permanent staff to engage with existing users of face-to-face service to understand level of required support for transition following the rollout of dedicated communications to these members.
- S4L Subcommittee to design a transition strategy that supports ongoing treatment of members using face-to-face service while also progressing them to online model.
- S4L Subcommittee design a financial strategy to accommodate increased demand for the service to ensure this does not compromise longevity of change (to be developed to ensure contingencies incorporated to change process).

Step 6: Creating short term wins

Kotter's model requires the change process to deliver some short-term wins to generate support and build momentum of the change plan (Kotter, 2007). These wins should be consistent with the strategic vision and focused on delivering progress towards an online counselling service that is accessible and useful for our members.

Creating short term wins – What needs to be done:

- Securing an appropriate supplier to deliver the online service by end of June 2023.
- Approval for funding from the OBA Committee for this supplier by end of June 2023.
- Launching an updated branding of the program to create a fresh look where people will anticipate the change and generate interest in the new online service by end of July 2023.
- The development of a triage tool for OBA staff to support in redirecting members by August 2023.
- Having a transition strategy in place for existing users of the face-to-face counselling service before 1 September 2023

Stage 7: Consolidating gains

Over time we would need to make it more difficult for OBA members who access the residual face-to-face services to create incentives for them to transition to online model. This focus will make clear that the online delivery model is the approach going forward. We need to ensure we are making it easy for new users to access the service by increasing awareness and uptake of service – showing the momentum of change from our members. We will ensure our guiding coalition and the new supplier of services is regularly engaged at OBA events to talk about uptake and the success of the program.

Consolidating gains – What needs to be done:

- Communicate and celebrate our successes to show momentum of change process through our existing platforms.
- Reward those members who have transitioned from face-to-face to online with additional sessions to support their treatment and reward buy-in to process.
- Design an evaluation strategy before launch to track performance, including creating a feedback loop to the OBA board and members. See [We will know we are successful when](#).

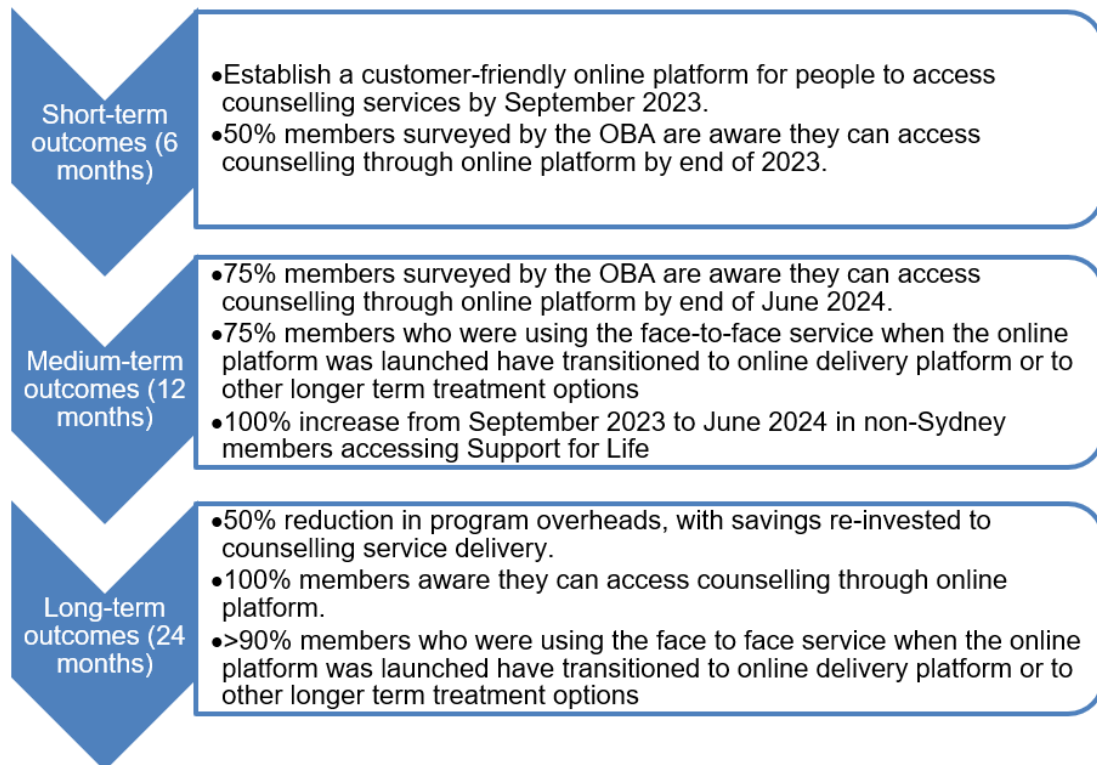
Stage 8: Anchoring change

To ensure the online counselling service is here to stay, there would need to be continual project evaluation. The Subcommittee must ensure that there feedback loops with OBA members who utilise the service to understand the impact of the change. We must also ensure the S4L subcommittee owns the delivery of the program rather than an individual to ensure that the change is anchored in the organisation not just the current Chair of the Subcommittee.

Anchoring change – What needs to be done:

- When the OBA board sets its 2024-2027 Strategy, the S4L online delivery model, and its ongoing evaluation, are included as key measures within the Strategy that the board is accountable to members for.
- OBA staff are provided quarterly opportunities to talk to the S4L Subcommittee and OBA board on ongoing uptake and delivery of online model during formal meetings.
- Subcommittee creates a continuous improvement and evaluation framework leading up to launch and in period immediately following that includes regular reporting to the board.
- Subcommittee responsible with producing a post-implementation report on lessons learned in change process to be provided to the OBA board and be in a publishable format that can be shared with members and other organisations exploring similar change process. Evaluation to include double loop learning to ensure we consider individuals' experiences and where OBA could enhance how it delivers services (Brockbank, McGill and Beech, 2017).

We will know we are successful when



IMPACT

An online counselling service that all OBA members want to, and can, use.

Further detail on outcome delivery is at [Appendix A](#).

Stakeholder Engagement Plan

The S4L change management plan will be supported by a stakeholder engagement plan that delivers bespoke engagements with key stakeholders. The primary methods of engagement will be through email, social media, the OBA magazine, OBA events and direct engagement with current users of the face-to-face service.

Key messages

The OBA is enhancing how it provides support for members experiencing trauma or mental health challenges.

The S4L service will continue to have connections with Barker to ensure the service is seen as a safe space for members to access help – creating a sense of belonging (Smith and Stewart, 2011).

Members currently accessing the face-to-face service will be supported in their transition to the OBA online model or other long-term treatment options.

The transition to an online model will make it easier for members to access immediate help, including those who need specialist support, by showing how others have successfully made this transition

Bringing our key stakeholders with us

Stakeholder	Key change goals (if we did nothing else they would see change as successful)/ areas of resistance	Our actions and impacts (what we will do to deliver these change goals)	Contingencies (what could go wrong and how we will manage it)
<p>OBA board</p> <p>Supporter</p>	<ul style="list-style-type: none"> • Cost-effective mental health services delivered by an external provider to ensure that the OBA does not have to build expertise. • Access to the service is expanded, particularly for regional members. 	<ul style="list-style-type: none"> • Updates on implementation (pre and post commencement) at quarterly board meetings. • S4L Subcommittee deliver regular comms across key OBA platforms – communicate early and often. 	<ul style="list-style-type: none"> • Budget blow-out – design a financial strategy over three years to ensure new delivery approach is scalable. • Member push-back – proactively engage with impact members to ensure their co-create new solution.
<p>Members who have accessed the face-to-face service</p> <p>Potential Resistors</p>	<ul style="list-style-type: none"> • Members can access personalised services that work for them. • Ongoing treatment/mental health support is not compromised. • Relationships built up with existing provider preserved. 	<p>Noting that failure to provide this group with dedicated support could create resistance that would compromise delivery, it is proposed that:</p> <ul style="list-style-type: none"> • Talking points are developed for OBA staff and existing provider to explain change. • These users are offered opportunity to co-design new online platform functionality. • These members are given access to the S4L Subcommittee to talk through any concerns – either anonymously in writing or in person/online. • We will profile other organisations that have transitioned face-to-face counselling to online so our members can see themselves in the future changed state. 	<ul style="list-style-type: none"> • Opposition to change gets escalated to OBA board and compromises confidence in S4L Subcommittee leadership of change – Existing supplier and OBA permanent staff responsible for engaging with existing users directly with pre-prepared talking points and options to continue face-to-face counselling over short-medium term. • Members treatment impacted, causing mental health concerns – Existing supplier will provide ongoing treatment for existing clients and prioritise transitioning to longer-term treatment options over first 12 months of program.

Stakeholder	Key change goals (if we did nothing else they would see change as successful)/ areas of resistance	Our actions and impacts (what we will do to deliver these change goals)	Contingencies (what could go wrong and how we will manage it)
<p>Other members</p> <p>Supporters</p>	<ul style="list-style-type: none"> • Easy access to mental health support when they need it • Regional members have equal access to S4L as metropolitan members 	<ul style="list-style-type: none"> • Monthly posts on social media platforms explaining the reason for change and how new platform will work in the months leading up to commencement. • Monthly posts on social media platforms highlighting benefits of new platform that were not previously available, including increased hours of availability and specialist counsellors. • Article in quarterly <i>The Barker</i> (OBA magazine) that is sent digitally and in paper form (to ensure older members understand changes) reason for change and how new platform will work. • Re-branded service to be launched at August Annual General Meeting with new supplier invited to attend and explain service. • Other OBA services (including sporting, music and arts affiliates) provided free re-branded banners to put up at events, and promotional material to explain new service. • Talking points for OBA leaders and permanent staff to explain changes when engaging with members. 	<ul style="list-style-type: none"> • Members not aware of change – OBA board and senior leaders in organisation explain case for change and proposed future state of S4L at all engagements with members to lift awareness. • Too many members use the service, exceeding existing funding – Subcommittee to design a financial strategy to deal with over-subscription to service.

Stakeholder	Key change goals (if we did nothing else they would see change as successful)/ areas of resistance	Our actions and impacts (what we will do to deliver these change goals)	Contingencies (what could go wrong and how we will manage it)
<p>Existing supplier</p> <p>Potential Resistor/ Potential Guiding Coalition</p>	<ul style="list-style-type: none"> Existing clients' treatment not compromised. Not financially worse off in short-term 	<p>While noting the existing supplier has self-identified she cannot offer expanded service, there is still a risk of resistance. It is proposed that:</p> <ul style="list-style-type: none"> S4L Subcommittee invite existing supplier to be a member of the Subcommittee (aka the Guiding Coalition) Existing supplier is involved in design and rollout of new platform Existing supplier works with permanent OBA staff to design triage tool and talking points to support existing users of face-to-face system to understand reason for change and future state, as well as dedicate support available to those members Chair of Subcommittee to work with existing supplier to create ability to offer face-to-face services to existing users for first 12 months of program on a needs-basis Existing supplier included in videos advertising new platform to show continuity of support. 	<ul style="list-style-type: none"> Existing supplier changes mind and wants to continue to offer service or put in tender to offer new online service – Chair of Subcommittee to liaise regularly with existing supplier to monitor sentiment; include existing supplier in change process so she can see the value of the change to future users of S4L.

Change Impact Assessment – How we will evaluate

Measure of Success	Measurement Method	Target by September 2025	Timing	Responsible
Online platform launched	Monthly report	Comparison of project time, scope, budget plan and actual, not much difference.	Throughout project	S4L Subcommittee Chair reporting into OBA board
Member awareness with the online S4L	Customer Sentiment Surveys (quarterly) Monthly social media polls	100% of members are aware they can access S4L online.	Monthly tracking before commencement and after commencement.	S4L Subcommittee Chair reporting into OBA board
Increase in non-Sydney members using Life Support services	Questionnaire	100% increase in non-Sydney members using Life Support services	Before consultation After consultation	S4L Subcommittee Chair reporting into OBA board
Members' use of services has transitioned from face-to-face to an online delivery platform	Questionnaire	>90% of members using the online platform to begin counselling services	Before the start of the project After the project	S4L Subcommittee Chair reporting into OBA board

Appendix A

Benefit (level 1)	Outcome (level 2)	Action (level 3)	Current Situation	Future Capability
1. All OBA members have access to the provision of specialised online counselling services.	1.1 Establish a customer-friendly online platform for people to access counselling services	1.1.1 OBA S4L Subcommittee receive endorsement and funding from OBA board to change counselling delivery approach from face to face to online (completed)	Current cost overheads include spending money on hiring space to operate service resulting in less money to spend on counselling sessions	50% reduction in program overheads, with savings re-invested to online counselling service delivery
	1.2 Contractual engagement of new supplier of Support for Life program	1.2.1 OBA Support for Life Subcommittee identify the core elements of an effective online counselling service based off how other organisations offer similar services, including other schools, universities and employers		
		1.2.2 Undertake a procurement to identify preferred supplier for an online counselling service		
		1.2.3 Work with contractor to design an easy to use online platform		
2. 100% members aware they can access counselling through online platform	2.1 Communications strategy that explains what has changed.	2.1.1 Support for Life Subcommittee works with service provider to design a communications strategy	OBA Alumni members are unaware they can access counselling through online platform	100% members aware they can access counselling through online platform
	2.2 Targeted engagement with non-Sydney based members to draw attention to improve accessibility of Support for Life program	2.2.1 Subcommittee works with OBA staff to identify upgrades to website, social media and print information that will need to be progressed		
3. 100% members who were using the face-to-face service when the online platform was launched have transitioned to online delivery platform or to other longer term treatment options	3.1 Transition plan to support existing users of system to the new system	3.1.1 OBA Committee grants Subcommittee discretionary powers to approve counselling sessions outside of online delivery model to support existing users of face-to-face delivery while new platform is set up	Existing users currently only engaging with current supplier via face-to-face delivery.	>90% members who were using the face-to-face service have transitioned to online delivery platform or to other longer term treatment options

Benefit (level 1)	Outcome (level 2)	Action (level 3)	Current Situation	Future Capability
<p>4. 100% increase in non-Sydney members accessing Support for Life (from when service is launched)</p>	<p>4.1 Support for Life Subcommittee has a strategy to encourage non-Sydney based members who need help in dealing with mental health issues to use Support for Life program</p>	<p>4.1.1 Develop a triage tool for OBA staff to support them redirecting members to the online platform (where appropriate)</p>	<p>Currently no non-Sydney members are accessing Support for Life.</p>	<p>100% increase in non-Sydney members accessing Support for Life (from when service is launched)</p>
		<p>4.1.2 OBA advertises Support for Life initiative through existing media and social media, and increases exposure at non-Sydney events</p>		

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