Navigating Change: Strategies for Nonprofits to Thrive

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SOCIAL IMPACT ARCHITECTS

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CHAT STORM: AS YOU JOIN

Share Your Name / Organization / Location

Any burning questions?

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Genevieve Philippi
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Manage Participants
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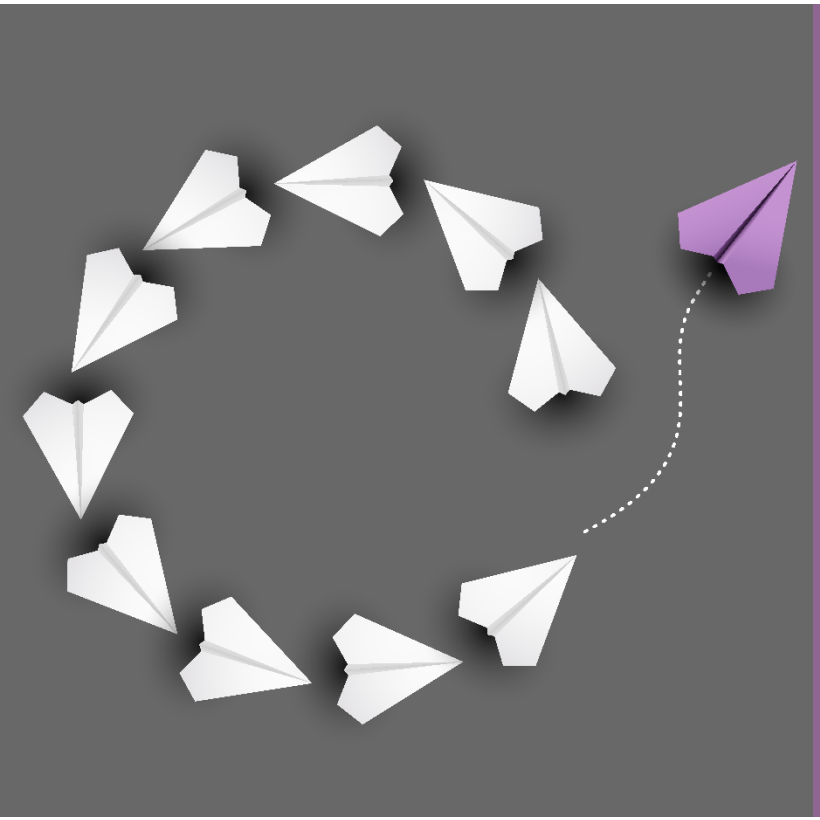

Change is All Around Us

The Future Is Here

Shift Happens

My Generation's
First **Eye Phone**

Technology Is Everywhere

4 Generations, 1 Workplace

Common Area of Conflict: **Generational Differences**	**Mantra**	**Values**	**Style**
Baby Boomers (1946-1964)	**LIVE TO WORK:** *Work hard because it defines you, and you can make a difference*	• Efficiency • Quality • Personal fufillment	• Team player • In-person communications • Title and money matter
Generation X (1965-1979)	**WORK TO LIVE:** *Work hard so then you can play hard*	• Automation • Direction • Self-reliance	• Entrepreneur • Direct and immediate communications • Freedom matters
Millennials (1980-2001)	**WORK TO FULLFILL:** *Work hard at work that has meaning*	• Multi-tasking • Tenacity • Goal-oriented	• Collaborative • Instant communications • Meaning matters
Gen Z (2002-2010)	**WORK TO WORK:** *Work hard to achieve independence and your goals*	• Flexibility • Resilience • Security	• Independent • Instant attention & communications • Authenticity matters

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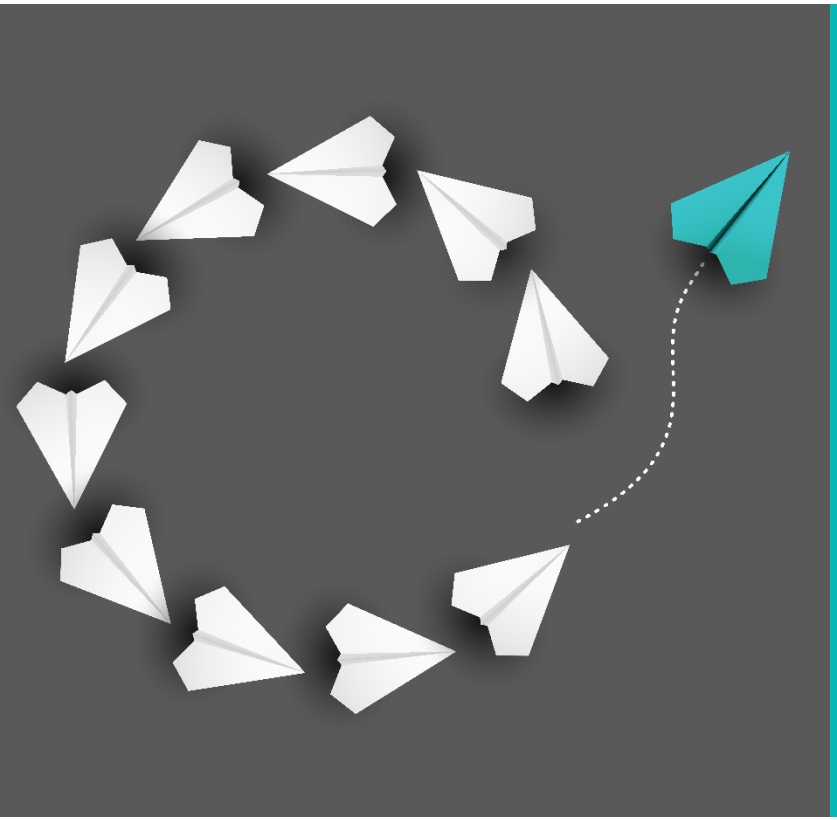
Polarization Eroding Connection

Loneliness Is an Epidemic

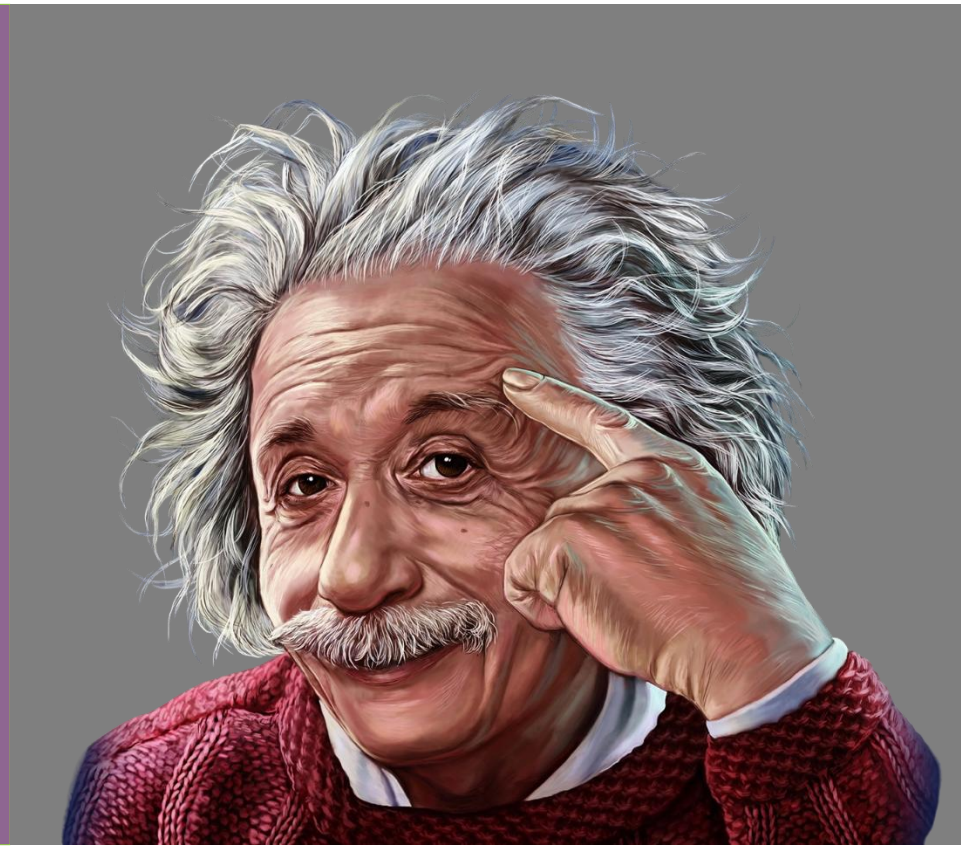
Shift Has Happened Before



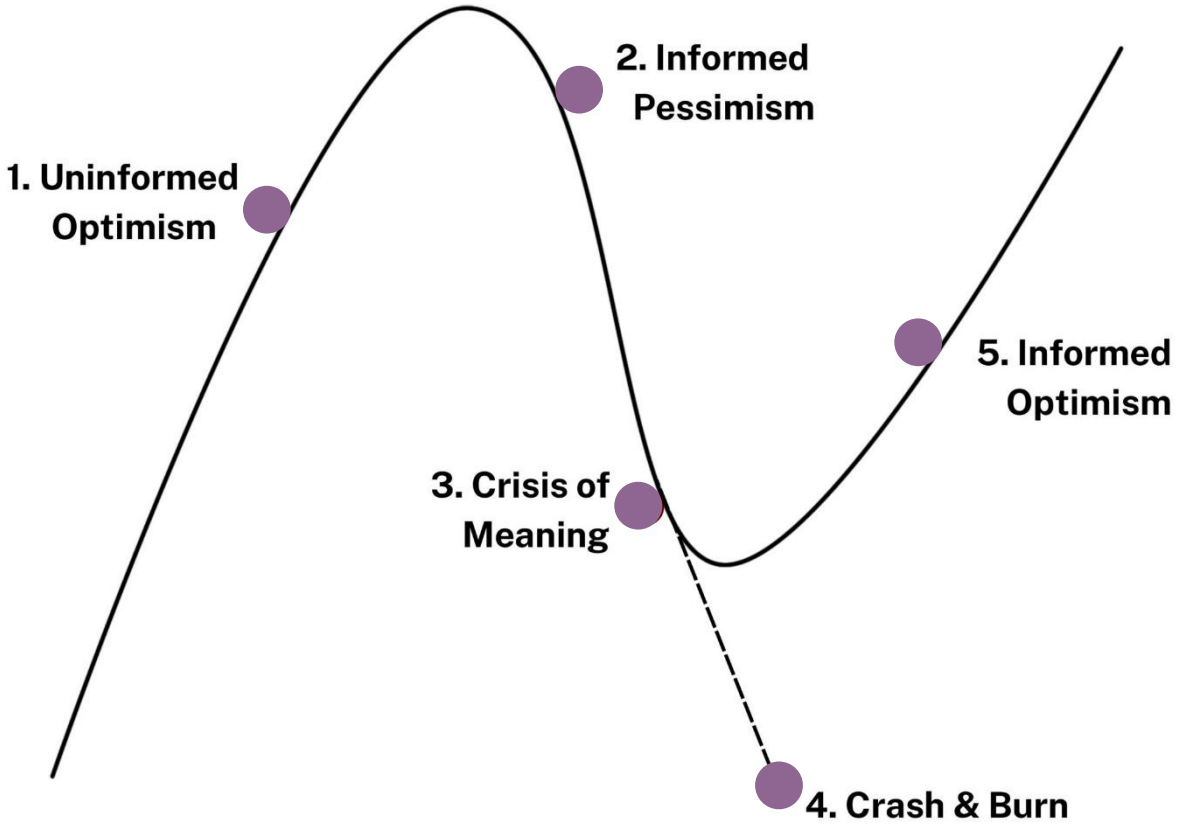
Change Management

"The measure of intelligence is the ability to change."

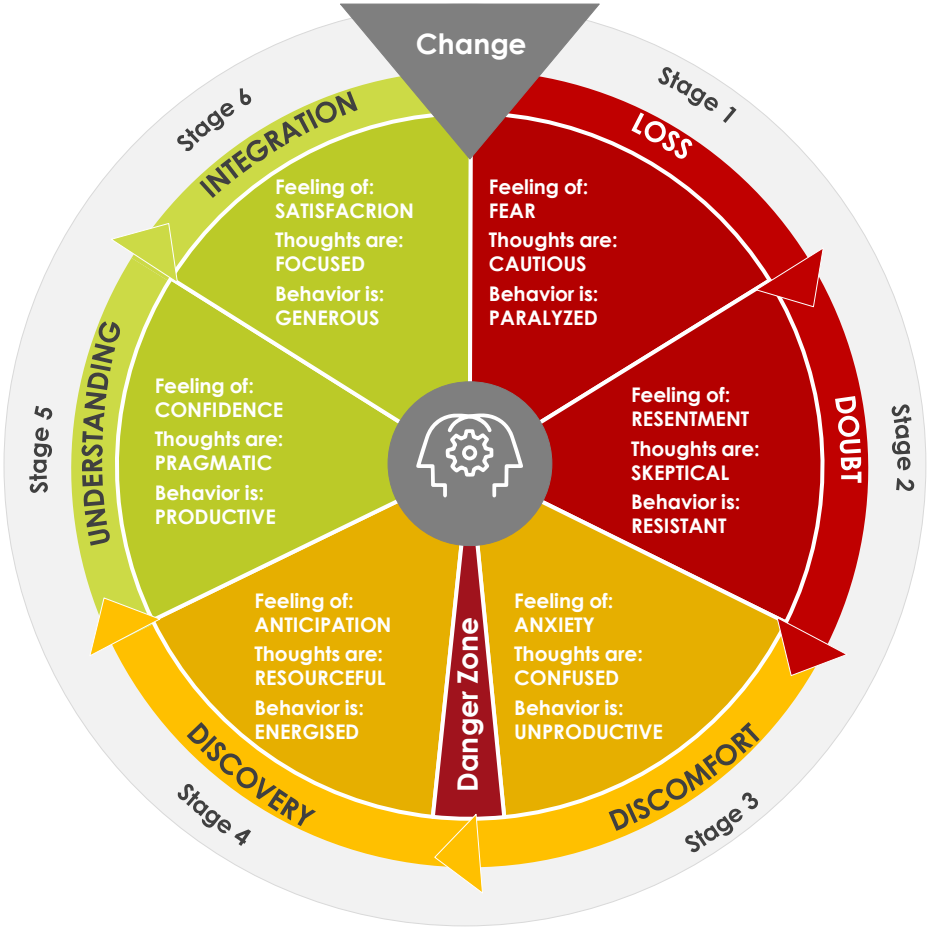
Albert Einstein



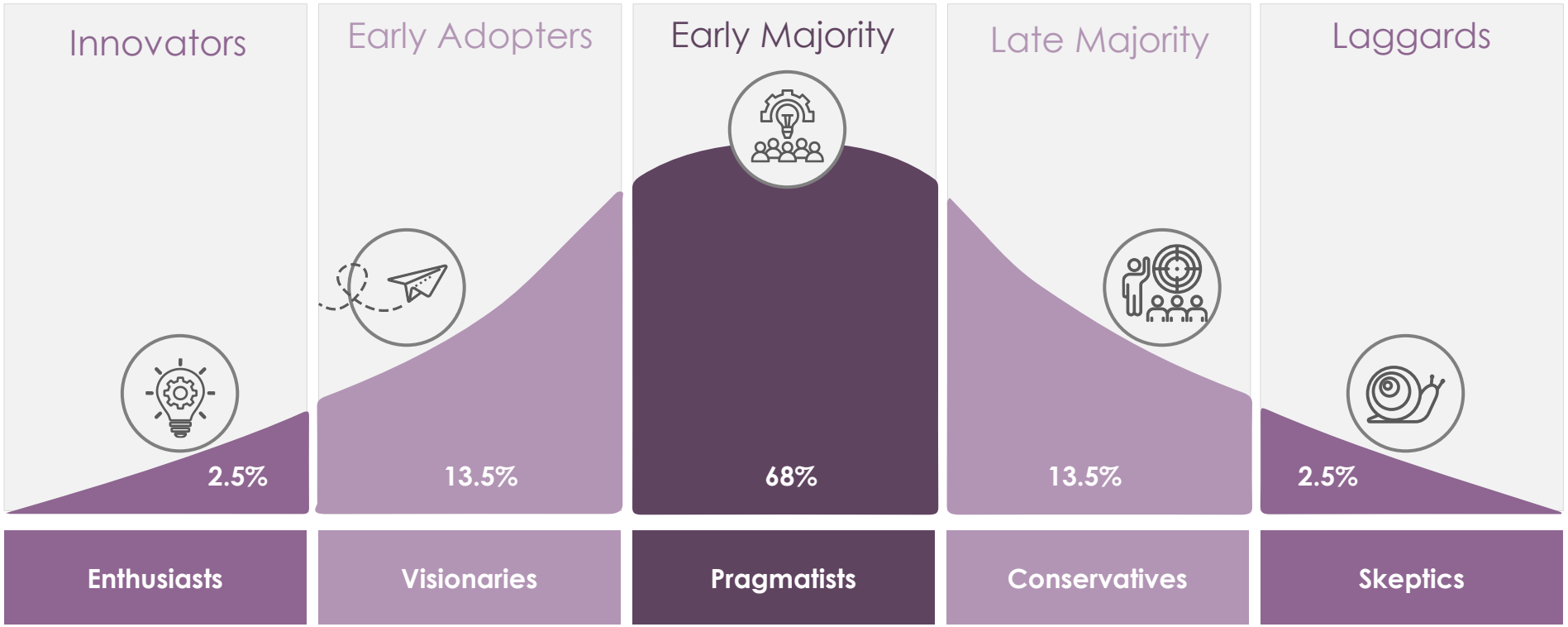
How Do We Process Change?



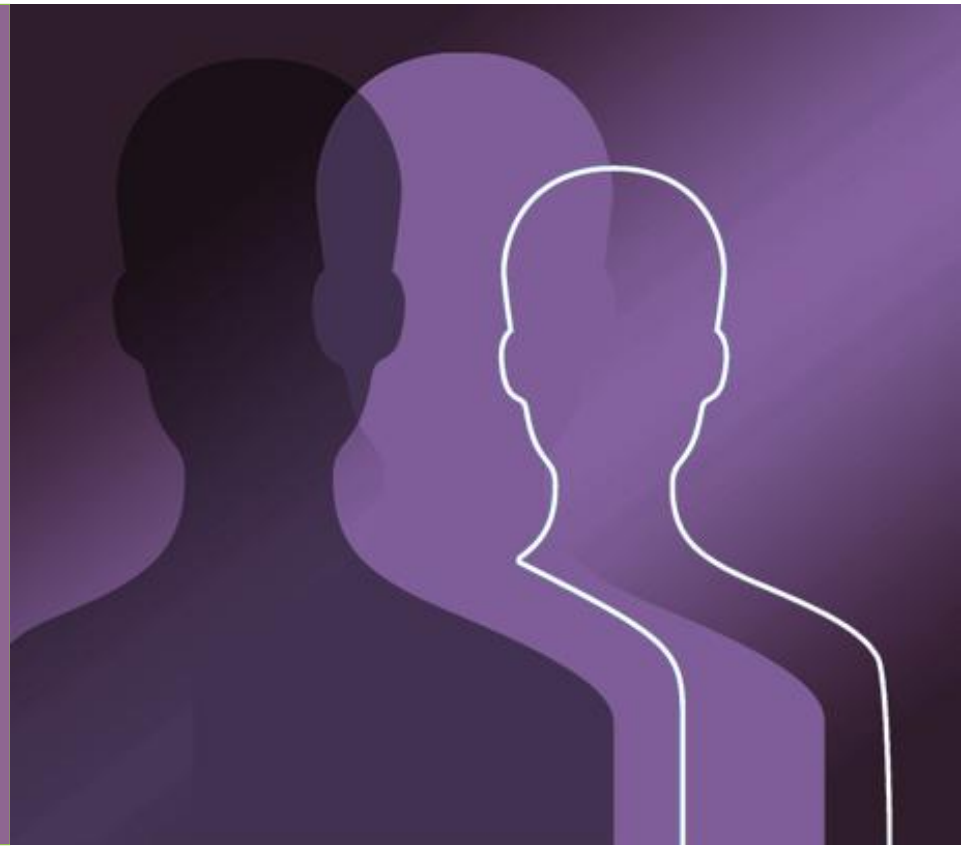
How Do Individuals Process Change?



How Do Groups Process Change?

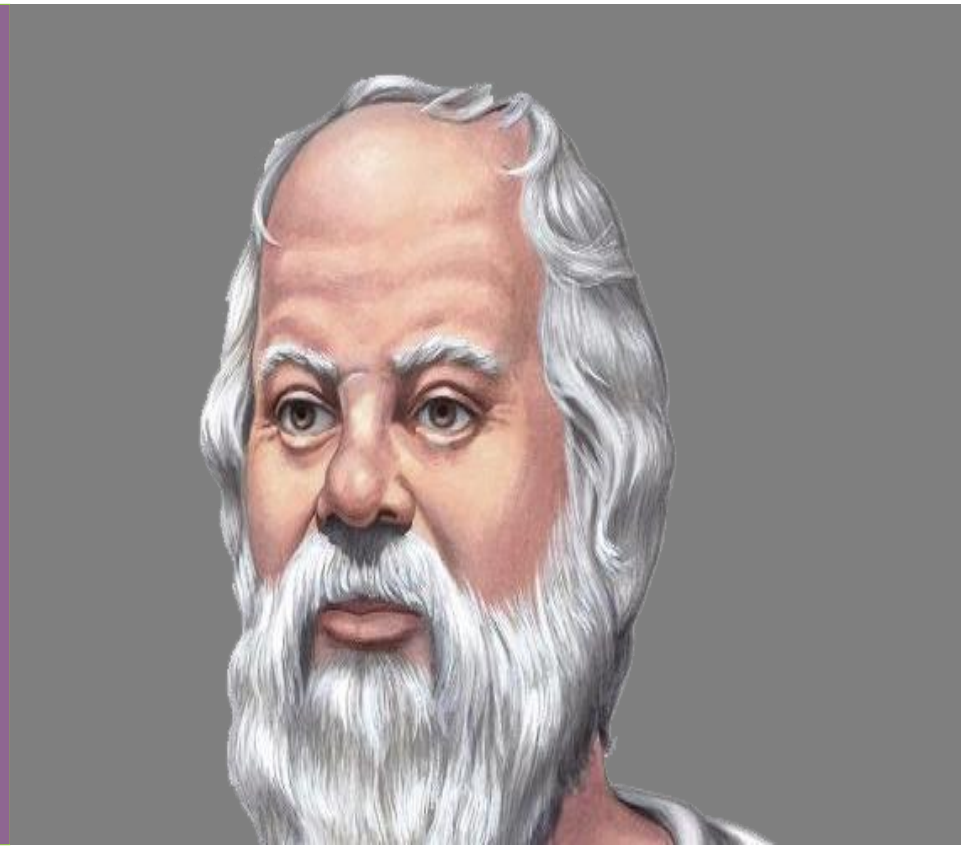


Group Illustration

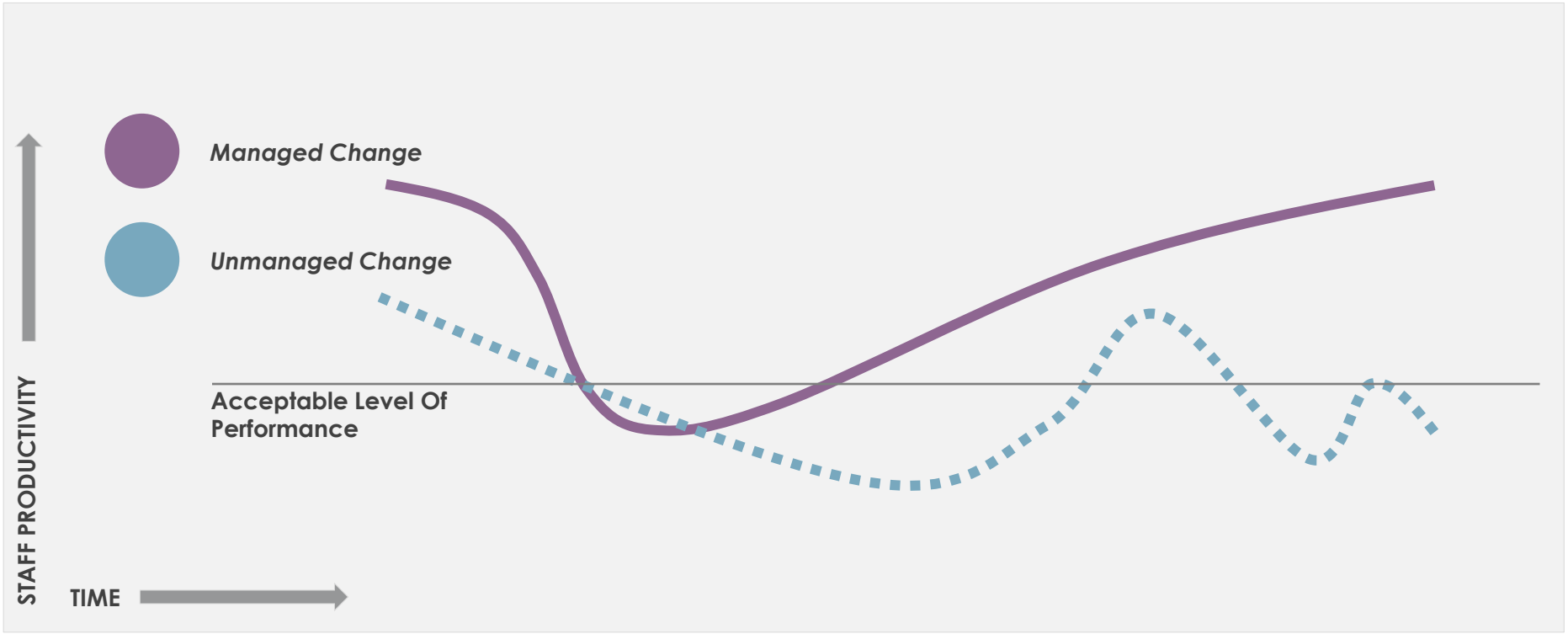


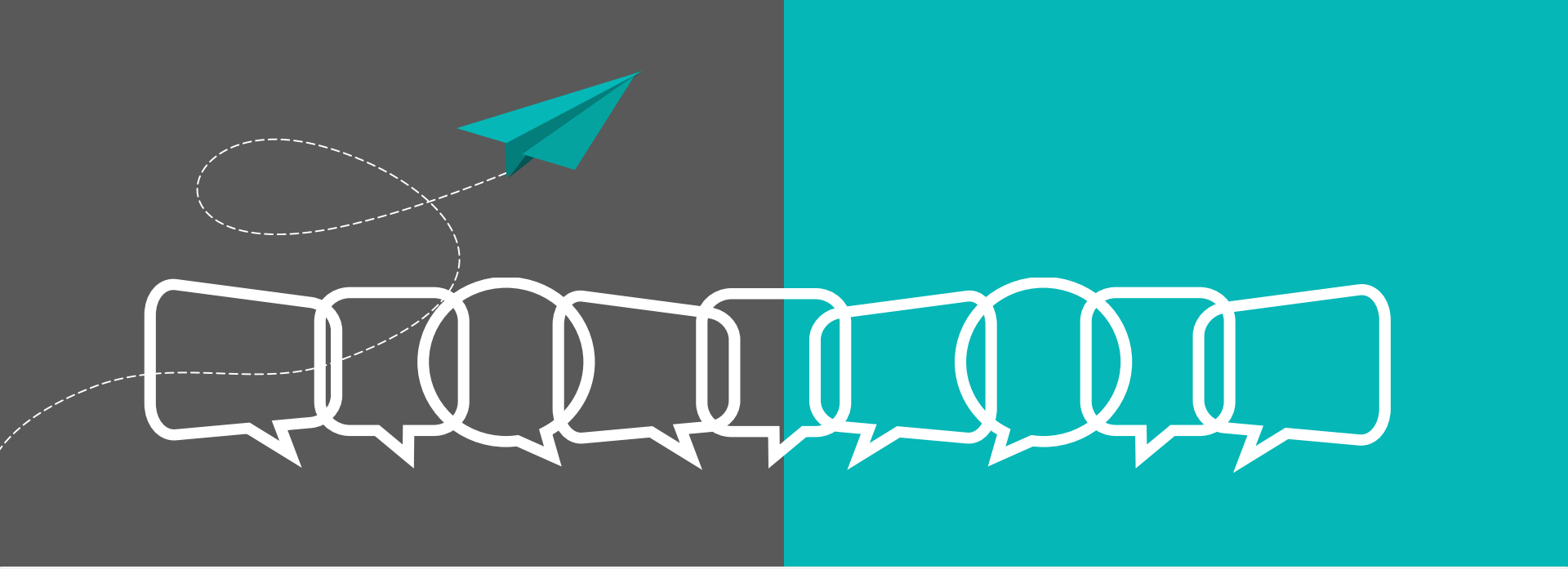
"The secret of change is to focus not on fighting for the old, but on building the new."

Socrates



How Do You Manage Change Successfully?





Group Discussion Topics:

- *Where is change hard for everyone?*
- *Why is it hard for this industry?*
- *What is easy to change?*
- *What is harder to change?*

Change Management

Change Management | The process of transitioning individuals, teams and organizations to a desired future state.

"Change is hard because people overestimate the value of what they have – and underestimate the value of what they may gain by giving that up."

James Belasco and Ralph Stayer in *Flight of the Buffalo: Soaring to Excellence, Learning to Let Employees Lead*

How to Create Change

Prepare for Change

- Establish a sense of urgency — 1
- Create a guiding coalition — 2
- Develop a vision & strategy — 3

Manage Change

- Communicate the vision — 4
- Empower broad-based action — 5
- Generate short-term wins — 6

Reinforce Change

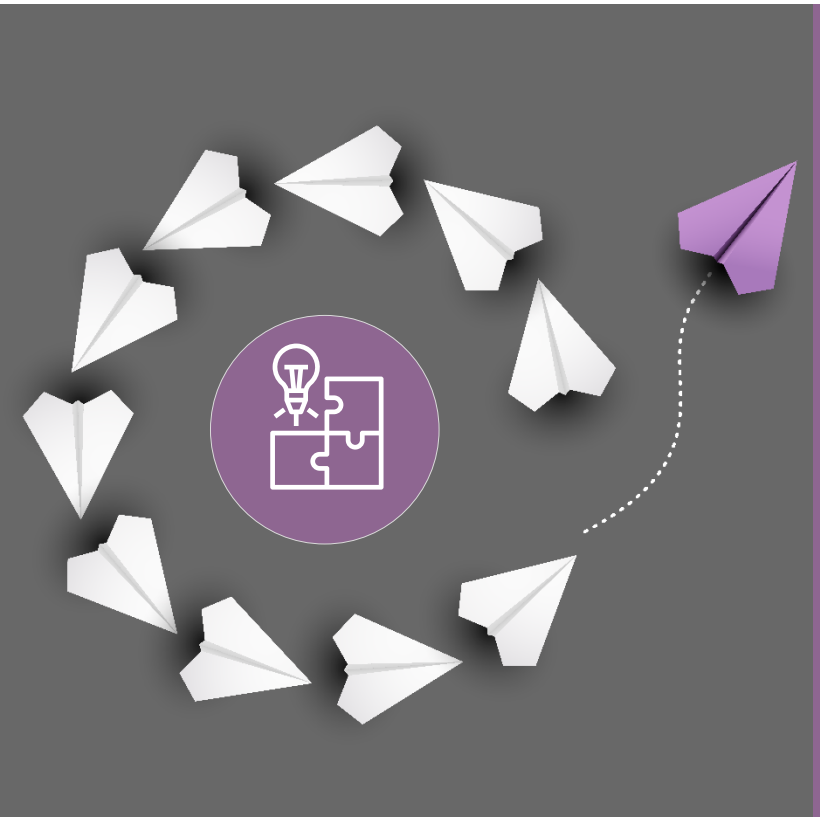
- Consolidate gains & produce more change — 7
- Anchor new approaches in culture — 8

Source: John Kotter; *Leading Change*; 2012.

ASSESS Your Organization (Grade A-F)

Prepare for Change	Establish a sense of urgency 1	Create a guiding coalition 2	Develop a vision & strategy 3
Manage Change	Communicate the vision 4	Empower broad-based action 5	Generate short-term wins 6
Reinforce Change	Consolidate gains & produce more change 7	Anchor new approaches in culture 8	

Source: John Kotter; *Leading Change*; 2012.



Prepare for Change

Step 1

Establish Urgency

Key Tasks

- Examine the environment, market and competitive realities
- Identify and discuss potential crises, threats or major opportunities

Major Challenge

- Remove sources of complacency

Sources of Complacency:

- Too much happy talk from senior managers
- Human nature; denial
- Absence of major visible crisis
- A low-candor, low-confrontation culture
- Lack of performance feedback from external sources
- Internal measurement systems focus on the wrong performance indexes
- Too many visible resources
- Low performance standards
- Organizational structures that are too narrowly focused

Source: John Kotter; *Leading Change*; 2012.

Step 2

Create a Coalition

Key Tasks

- Assemble a group with enough power to lead change
- Get the group to work together as a team

Avoid

- Members with big egos
- Members who create mistrust that kills change efforts

Sources of Diversity:

- **POSITION POWER** | Are enough key players on board, especially managers, so that those left out cannot easily block progress?
- **EXPERTISE** | Are there various points of view, relevant to the task at hand, represented?
- **CREDIBILITY** | Does the group have enough well-respected people in the organization to ensure its pronouncements will be taken seriously by other employees?
- **LEADERSHIP** | Does the group include enough proven leaders to drive change?

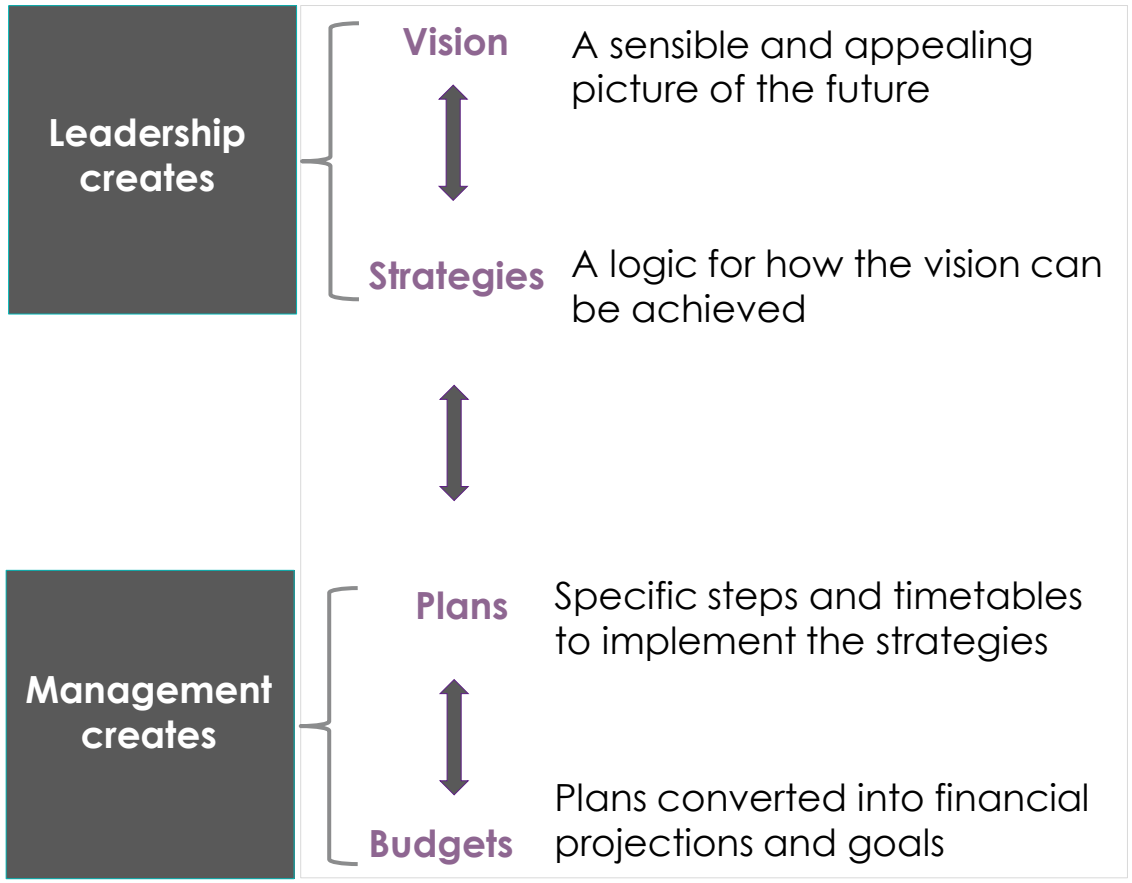
Source: John Kotter; *Leading Change*; 2012.

Step 3

Develop a Vision & Strategy

Key Tasks

- Create a vision to direct the change effort
- Develop strategies for achieving the vision



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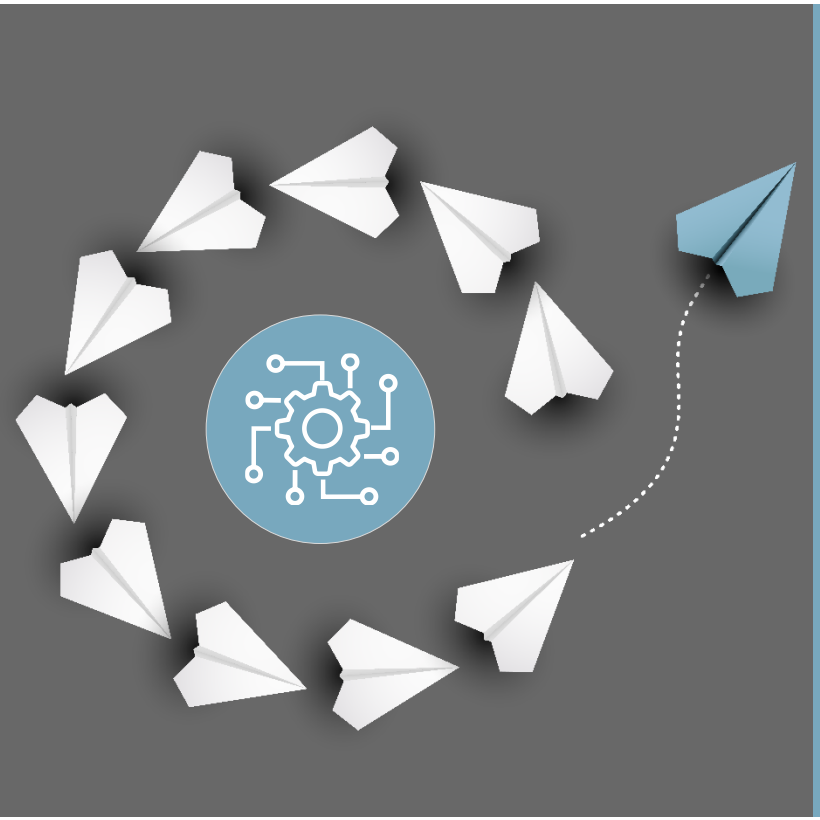


Manage Change

Step 4

Communicate the Vision

Key Tasks

- Use every vehicle possible to communicate the new vision and strategies
- Have the guiding coalition model expected behaviors

Elements of Effective Communication:

- Simplicity
- Metaphor, analogy and example
- Multiple forums
- Repetition
- Leadership by example
- Explanation of inconsistencies
- Two-way – use play when possible

Vision Communication
0.58%

Other Communication
99.42%

2,300,000 = Average # of words going to an employee over three months

13,400 = Average # of words going to an employee about change (equivalent to 30-minute speech + 1-hour meeting + 600-word article in newsletter + 2,000-word memo)

0.58% of all communications are for the vision

Source: John Kotter; *Leading Change*; 2012.

Step 5

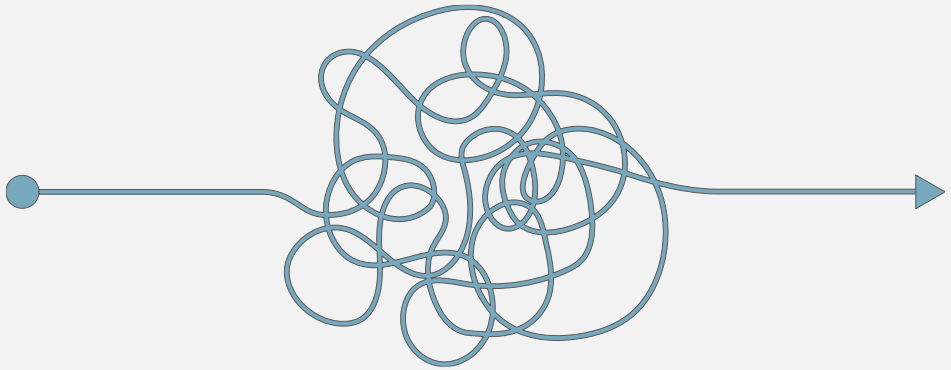
Empower Broad-Based Action

Key Tasks

- Get rid of obstacles
- Change systems or structures undermining change
- Encourage risk-taking

How systems or structures can create obstacles to change:

- **SILOS** → Slow down decision-making and action
- **LAYERS OF MIDDLE MANAGERS** → Intent of the change vision can get lost in translation through criticism of employees and second-guessing
- **HIERARCHY** → The need for multiple approvals stalls progress and slows communication



Source: John Kotter; *Leading Change*; 2012.

Step 6

Generate Short-Term Wins

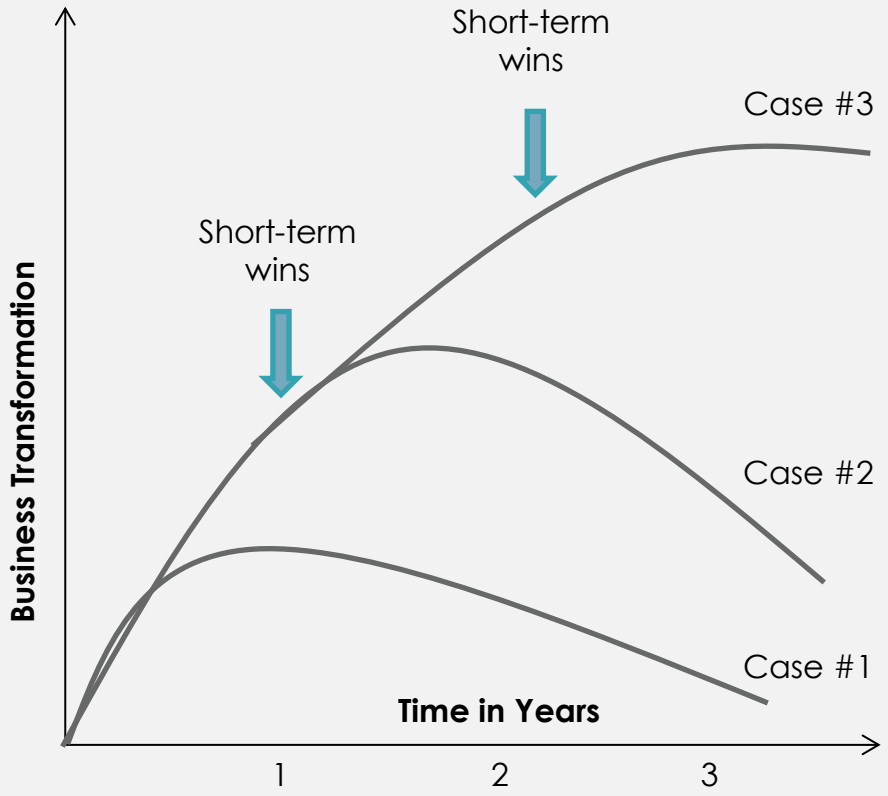
Case #1: No short-term wins
Case #2: Short-term wins @ 14 months
Case #3: Short-term wins @ 14 and 26 months

Key Tasks

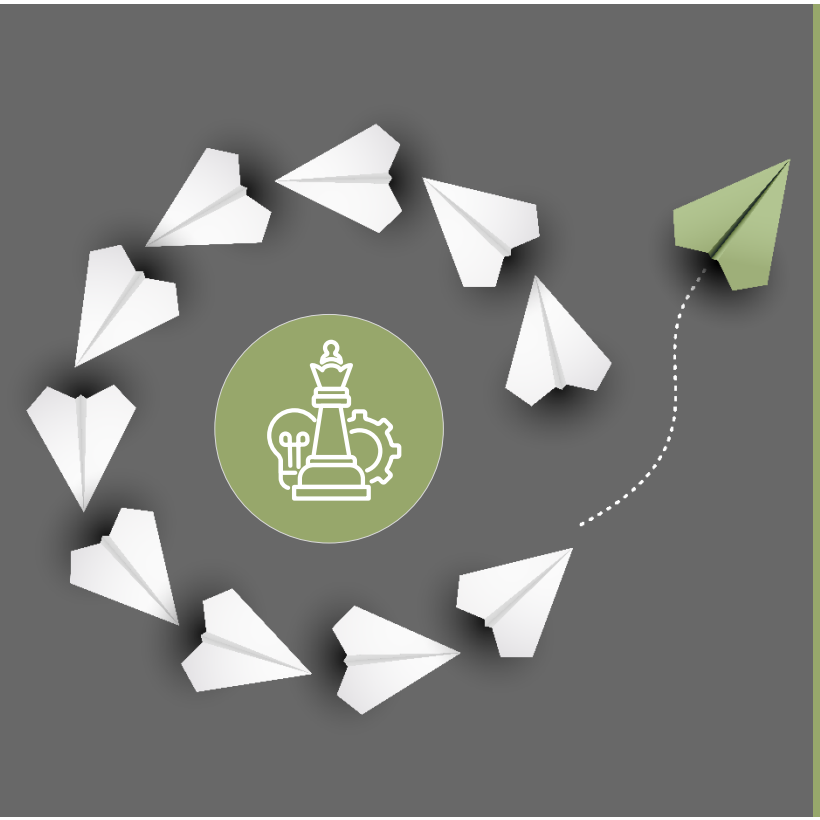
- Plan for visible improvements in performance or "wins"
- Create those wins
- Visibly recognize and reward people who make the wins possible

Benefits of Short-term Wins

- Evidence that sacrifices are worth it
- Reward change agents and build motivation
- Help fine-tune vision and strategies
- Undermine cynics
- Keep bosses on board
- Build momentum



Source: John Kotter; *Leading Change*; 2012.



Reinforce Change

Step 7

Consolidate Gains, Create More Change

Key Tasks

- Use increased credibility to change all systems, structures and policies that don't fit the transformation vision
- Hire, promote and develop people who can implement the change vision
- Reinvigorate the process with new projects, themes and change agents

What does success look like in Step #7?

- More change, not less
- More people are brought in to help with the changes
- Increased participation from lower ranks in leading and managing projects

Source: John Kotter; *Leading Change*; 2012.

Step 8

Anchor New Approaches in Culture

Key Tasks

- Create better performance through behavior, better leadership and management
- Articulate connections between new behaviors and organizational success
- Develop means to ensure leadership development and succession

How does this manifest itself?

- Managers talk about how **performance improvements** are linked to new practices
- Managers talk about where the old culture came from, how it served the organization well, but **why it is no longer helpful**
- Managers work hard to convince anyone who embraces the new culture to **remain at the organization**
- Managers ensure new hires are not being **informally screened** according to old cultural norms and values
- Managers **do not promote** people who don't embrace new practices

Source: John Kotter; *Leading Change*; 2012.

Organizational Assessment

Analyze your organization's typical success at each step with a grade of A-F:

What do you do well?
What can you improve upon?

Change Diagnostic

To create meaningful change, you need all key inputs. If any one is missing, the formula is off and creates an undesired outcome.

KEY INPUTS					OUTCOME
Vision & Strategy	Skills & Training	Motivation	Resources	Action Plan	**Change**
	Skills & Training	Motivation	Resources	Action Plan	**Confusion**
Vision & Strategy		Motivation	Resources	Action Plan	**Anxiety**
Vision & Strategy	Skills & Training		Resources	Action Plan	**Resistance**
Vision & Strategy	Skills & Training	Motivation		Action Plan	**Frustration**
Vision & Strategy	Skills & Training	Motivation	Resources		**Ambiguity**

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Check-out: A-HA! Moment

Share a top A-HA! Moment

Key Takeaways – Upping Your Game

- Change is inevitable. Don't let it overwhelm you.
- People respond to change differently.
- Change can work – it just needs to be managed wisely.
- When change does not happen – don't blame the person; blame the process and try again.
- People are highly motivated by rewards.

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WHAT NIKE CAN TEACH US ABOUT NONPROFIT VALUES, CHANGE MANAGEMENT AND TRENDS

KEYS TO MAJOR LIFE CHANGES

NONPROFIT CONFLICT MANAGEMENT

CHANGE MANAGEMENT

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Founder & CEO, Social Impact Architects

EDUCATION EXPERIENCE

- MBA, Duke University's Fuqua School of Business
  - Selected as CASE (Center for the Advancement of Social Entrepreneurship) Scholar
- Adjunct Professor – The University of Texas at Arlington

AWARDS & HONORS

- Best for the World Small Business Award, B Lab
- Top 10 Social Sector Blog, Huffington Post
- Next Generation Social Entrepreneurs Award, SE Alliance
- Young ATHENA Award, Dallas Regional Chamber
- 40 Under 40 Award, Dallas Business Journal
- Women in Business Award, City of Dallas
- 2014 Collaboration of the Year, Workforce Solutions of Greater Dallas

COMMUNITY LEADER

- TEDx Speaker, "Everyone Can be a Changemaker"
- City of Dallas – Past Appointments to City of Dallas' Arts and Culture Commission, Library Board, Landmark Commission, Mayor's Task Force on Poverty, Mayor's Commission on Homelessness, South Dallas/Fair Park Trust (Vice Chair), Landmark Commission, and Board of Adjustment (Vice Chair)
- Member, Junior League, Leadership Dallas, Dallas Summit and Leadership North Texas

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About Social Impact Architects

Social Impact Architects® is a social change agency that provides consulting and learning resources to changemakers, working alongside them to design creative and transformative solutions to social issues. SIA uses innovative, market-driven management tools to design cost-effective, pragmatic plans for our clients. We work collaboratively with our clients to ensure organizational ownership and improved capacity to sustain the solutions we help design.

About SIA

- Created in 2009 to bridge the divides in the creation of social solutions between governments, philanthropy, and nonprofits
- Established as a Benefit Corporation; received Best in the World from 2015-2019
- While headquartered in Dallas, Texas, the firm works across the country with clients large and small with a focus on the middle of the country
- Leverages a diverse virtual team with masters and doctorate degrees from across the country speaking multiple languages

Firm Expertise

- Authors ***Social TrendSpotter*** (@socialtrendspot), one of the sector's top blogs according to the *Huffington Post*. Known for its relatable way of blending important concepts and new ways of working with storytelling, ***Social TrendSpotter*** has been hailed by readers as "the only blog I read each week."
- ***Social Impact Architects*** has successfully contributed to system change and innovation projects at the local, state and national level. This process has been so successful that it was presented in 2015 at the U.S. Conference of Mayors as a best practice.
- ***Social Impact Architects*** serves in a number of advisory roles to government, including HHS's roundtable on social enterprise.

SOCIAL IMPACT ARCHITECTS

CEO, Suzanne Smith, testifying at the U.S. Conference of Mayors in 2015.