

MANAGING CHANGE IN CHARITY ORGANISATIONS



When we set out to write this guide on change management, things looked very different. None of us could have anticipated that we would soon find ourselves amidst what looks set to be the most transformative and disruptive event in living memory. Managing the impending fallout from Brexit was top of most organisations' agendas, which seemed quite enough to be getting on with.

We intended to address the particular challenges we know that charity organisations experience when undergoing transformation. For some of you, social distancing measures and the many levels of separation that they impose – both physically and emotionally – will have made this an even more challenging task than before.

Your organisation may currently be operating with reduced budgets, or resource or time, or all of this and more.

But Coronavirus hasn't changed the game; it's accelerated it. The digital experience of your supporters has merely been thrust into the spotlight, highlighting existing problems. For most of you, the need for change and adaptability was already present.

The principles laid out in the following pages are intended to enable organisations to foster a change mindset and capability that can withstand unpredictable events. They stand true in this new context, and they will continue to do so.

In short, Coronavirus has changed everything and nothing. Because the one thing we can know for certain is that change will always be required. The driving factors may look a little different, but the need will always be there.

We hope that you find this guide informative and of value, now and in future.

Alan Perestrello & Gavin Pollock

Co-Founders and Directors

Trillium X



index

01

Change is hard

pg. 04

02

Why change is hard for charity organisations

pg. 05

03

Change management models

pg. 06 - 07

04

Trillium's approach to change management

pg. 08

05

The process of change for individuals

pg. 09-10

06

David's "Eight 'Ates"

pg. 11-13

09

Summary

pg. 14

10

Clients / Contact

pg. 15 - 16

Change is hard.



For organisations it's a huge challenge and as individuals we're naturally resistant to it. It messes with our autonomy and makes us feel like we're losing control of our territory. It disrupts our routine, which makes us uncomfortable and fearful of our ability to cope with the new way of doing things.

(Harvard Business Review)

We all know that the not-for-profit sector in particular can find transformation challenging. Change in charity organisations can come about in so many ways – a new Chief Executive, a new team structure, a new phone provider. Wherever there is change, employees, stakeholders and supporters are all impacted.

Digital transformation is historically even more difficult to pull off than traditional change methods. A 2018 McKinsey report highlights that while less than 33% of traditional transformation projects succeed, the success rate for digital transformation is even lower. For those that say digital transformation is dead, this might feel irrelevant, but it isn't. In this day and age, there is no transformation without digital. Digital is inherent in everything we do, so any sort of change programme you initiate will include it.

It's not all bad news. At Trillium we've been supporting clients through their digital transformation projects over the past decade. This guide brings together our own experience with tried and tested change management methods, so you can confidently embark on your next project.

Why change is hard for charity organisations



Some traits of charity organisations that make them great are actually the same things that make change difficult.

Legacy

This is often a defining feature of charity organisations. Many charities benefit from (and rely on) the continued support of donors and fundraisers who have been with them for a long time. This is generally a direct result of a charity doing what it does well – communicating the importance of the cause, engaging with passionate supporters, and building lasting relationships founded on trust. However, this can also lead to resistance towards changing systems and processes for fear of losing the support of long-term donors who may not be familiar with newer technology or comfortable with change.

Fiscal accountability

For charities, income generated through fundraising activities is precious, resources are frequently scarce, and spending is often subject to intense scrutiny. Change and growth inevitably requires investment of resources – people, time and money. While these projects are usually the very thing needed in order to grow fundraising income and better support beneficiaries, it can sometimes seem difficult to justify any investment that could be seen to be diverting funding away from the cause. This sense of accountability can hamper the development of a change mindset within the organisation.

Community

Your relationship with donors and fundraisers is not simply transactional; their investment is primarily made with the intention of furthering your cause. As a consequence, they do not necessarily care about your fundraising and are financially and emotionally invested in a way that doesn't usually happen in other types of business. Any transformation that you embark on needs to not only provide financial benefit, but also improve the organisation's ability to engage future supporters, better service your cause and/or beneficiaries, and make tangible impact. How and when you demonstrate and communicate this needs to be part of your strategy at every step, listening and being responsive to stakeholders.

Change management models



For decades people have dedicated their careers to finding the holy grail of change management models. We've taken a look at some of the most popular ones.



McKinsey's 7-S

McKinsey's 7-S model is one of the earlier models and suggests that there are 7 internal aspects of an organisation that need to be aligned in order for it to be successful.



Bridge's Transition Model

At the core of this model is the notion that change and transition are different and that getting people through transition is vital for the change to work as planned.



Nudge Theory

This theory has been making headlines recently and everyone from the BBC to the government has had an opinion on it. In a nutshell, nudge theory is a behavioural science technique that works on the principle that small actions can have a substantial impact on the way people behave.



Peter Senge's Fifth Discipline

This model suggests that instead of a traditional hierarchy, creating an environment where everyone in the business increases their capacity for learning together will help an organisation to succeed.



Lewin's Change Management Model

This model asserts that there are three stages to change: Unfreeze – getting ready for change; Change – the process of transitioning; and Refreeze – establishing stability again.

What do these theories all have in common?

For those 33% of transformation projects that succeed, these organisations will be focusing on their people – the skills they have, their feelings towards change, empowering them to succeed – instead of the technology/system/process that they are transforming.

Your transformation programme is unlikely to succeed if you don't put your people at the heart of it.

Trillium's approach to change management



We don't believe that there is a one-size-fits-all solution for change management and have never subscribed to the idea that one change model is better than the rest.

In fact, we don't have a formal change strategy at Trillium. We believe that change is a mindset, and we instil that mindset into our employees and make sure we hire people that share our values. Key to this is being honest with ourselves about our capabilities and limitations – an understanding of which enables us to be well prepared when the need for change arises. 2019 was a year of huge change for us. Due to this mindset we were able to transition into becoming part of a larger group of companies with minimal impact on our day-to-day running.

We know your challenges are different to ours

In our years of working with charity organisations we've developed some practical solutions to helping ensure success in their digital transformation projects. In the following pages, we'll outline what we believe to be the key elements of any successful change process.

The process of change for individuals



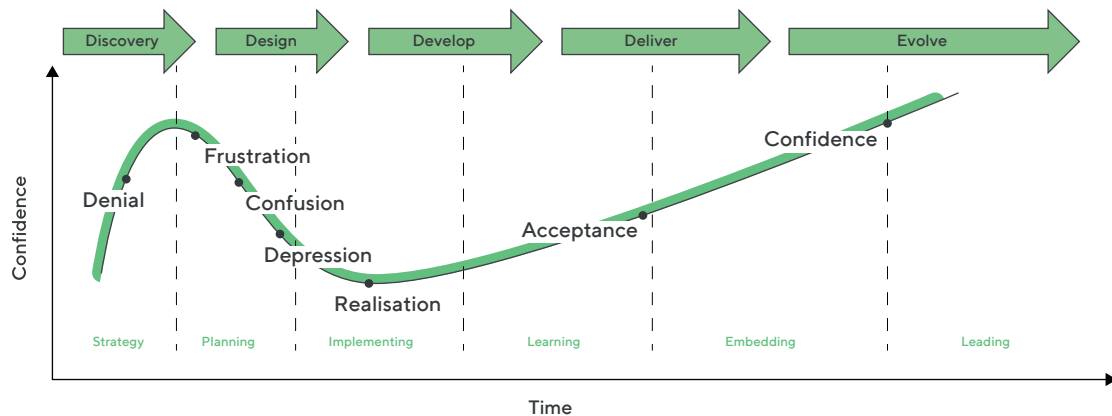
“Forewarned, forearmed; to be prepared is half the victory.”

Miguel de Cervantes

By acknowledging that change is hard, you will be prepared for its challenges. The “Kubler-Ross Curve” is commonly used to understand the impact of change on an organisation. It’s also known as the “5 Stages of Grief” and used to counsel people through trauma. It’s so effective as a change management tool because our emotional response to change is not dissimilar to those experienced when grieving. Change really can be that hard.

To make it a little less hard, we’ve mapped our project management stages to the curve on the following page. By knowing where you are on the change journey, you can support your teams by proactively meeting their needs, mitigate frustrations and maintain buy-in.

Of course, a change process (like grief) is not often this simplistically linear. However, by breaking the journey down into more digestible stages, even at tricky times, you won’t feel overwhelmed or lose sight of how to reach your ultimate objectives.

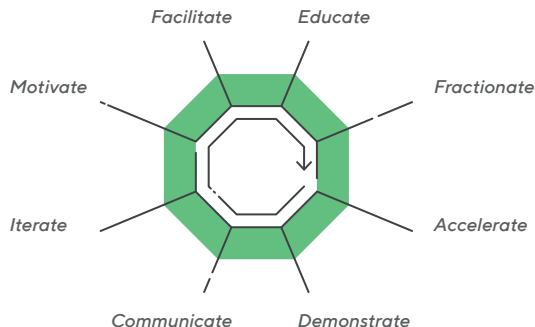


Trillium's project management process, from Discovery to Evolve, mapped to the Kubler-Ross Curve.

David's "Eight 'Ates"



David Spector is Head of Strategy at Trillium and has been delivering successful digital transformations for over a decade. He has established eight elements that you need to consider throughout your transformation project. If things aren't working out as you'd expect them to, take an honest view on how you are dealing with each of these 'ates.' If you're doing all of these things, you should be able to keep your project on track.



01

Demonstrate

Show the benefits of change.

Regardless of the scale of your digital transformation, you need to get buy-in at every level. People will need to understand the benefits from their perspective, such as making them more effective at their jobs.

Your board needs to see the cost-savings/revenue opportunities and your supporters need to understand that initial disruption will ultimately mean an improved experience and delivery of value.

02

Motivate

Encourage and excite.

Generate a buzz around the change. This could be via competitions or meetups – whatever works for each department. Make it exciting for your employees and your supporters and motivate them to participate, embrace the new and be advocates for the change.

03

Facilitate

Provide the resources, tools and access that reduce friction.

Provide a toolkit that supports those impacted by the change. This could include FAQs, training manuals or perhaps a chat channel. Allowing access to the driving forces behind the change will enable your employees and supporters to feel like they are part of the process.

Be sure to test your resources on a pilot group of supporters and employees to make sure that they work effectively.

04

Educate

Teach people what has, and is going to change, and how to navigate the new.

Train your employees and supporters on any new systems. Outline the new way of working and remember to reiterate why it is better than the old way – even if it doesn't currently feel like it.

05

Fractionate

Break large change into smaller, achievable steps

We mentioned this in our guide to creating a digital culture. One of the best ways to succeed is to break your transformation down into smaller achievable projects. You're more likely to succeed at each step and more likely to get buy-in from board level and external stakeholders when they have proof of your success.

06

Accelerate

Don't procrastinate!

Once you have decided to make a change start the process sooner rather than later. Keep up the momentum and remain enthusiastic. Change frequently fails when the energy starts to visibly wane.

07

Iterate

Review and refine, based on experience.

Digital transformation should be fundamentally agile in nature. Review progress at every step and don't be afraid to change your plan if you need to. You will learn as your project goes along, and it is much better to refine based on feedback and insights than to stick to a plan that might not work.

08

Communicate

Communicate clearly, honestly and often.

This is perhaps the most important 'ate' of all. Your digital transformation needs a communications plan. Identify audiences, define appropriate messaging and communicate at the right time. All significant transformation projects encounter challenges – be honest and open about these, so that your employees, supporters and other stakeholders continue to trust in your leadership and the project as a whole.

Summary



"Nothing in the world is worth having or worth doing unless it means effort, pain, difficulty..." Theodore Roosevelt

Looking at digital transformation, you are probably initiating change so you can better engage supporters, continue to serve your cause, and demonstrate the impact of your work.

When embarking on your next digital project, focus on adopting the right mindset rather than the right model. Think about how change will impact on the people involved – both inside and outside of your organisation. Remember these key things and you'll be set for success.



Always keep your supporters front of mind. Their support is key to enabling your organisation deliver change and serve your cause. Change programmes should always be designed to improve the supporter experience.



Focus on people and culture rather than technology and process. If your people embody the right mindset for digital transformation you are more likely to succeed.



Communication is fundamental to your success. We recommend treating a digital transformation programme as an internal marketing campaign – develop a communications plan, set aside budget and prioritise this work.

Our clients

		 Association of Optometrists	 FACULTY OF PUBLIC HEALTH	 LONDON CHAMBER COMMERCE AND INDUSTRY	
 Royal College of Physicians	 ACTION ON HEARING LOSS A national charity since 1971	 Chartered Institute of Environmental Health	 WSET	 ROYAL AERONAUTICAL SOCIETY	
		 RADA ROYAL ACADEMY OF DRAMATIC ART	 Chartered Institute of Taxation Excellence in taxation		

We deliver digital transformation for membership and charity organisations.
By bringing together Strategy, CRM and Digital, we transform the entire user experience.

Change doesn't come easily. Achieving successful digital transformation starts with choosing the right partner to help you every step of the way.

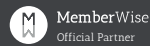
[Get more guidance](#)

Trillium 

24 Southwark Bridge Road,
London, SE1 9HF

tel: **020 3880 1888**
happiness@trillium.net

Partnering with:





trillium.net |  /Trilliumx  @Trilliumx