



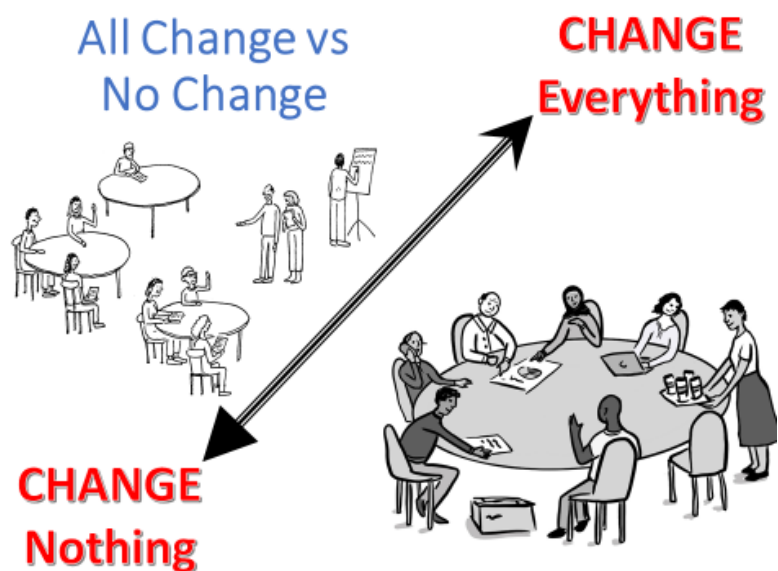
## VI. Change vs Status Quo: Understanding What to Change and What to Keep - A great learning event for staff and volunteers

An organization needs to consider what needs to be changed to make sure it fully supports a new strategic plan. The approach I use here is what I call the “Status Quo and Change” activity. It is a group activity to understand what needs to change and what needs to stay for success!

In a group of anywhere from 10 to 60 participants, I indicate that one corner of the room is the Status Quo and another faraway corner is Change. I ask people to think about their own individual work and tasks and where they would place their functions on the axis of keeping everything as it is now or changing everything to something new – all in order to have successful implementation of the new plans.

After a few minutes of thinking, I ask everyone to look at the spot on the axis where they think they should be for success, and then actually to get up and walk to that spot. Usually people are grouped a bit together but with some participants on either end of the axis. Important: no one is right or wrong here. I ask selected individuals from the middle and from both ends why they chose to be where they are. Most people find it really interesting to hear the different responses from their friends and colleagues.

Participants come to see that some functions should stay exactly as they are and that others should change quite a bit. Once when I did this with a large staff and the chairman of the board of Foster Parents Plan, I found that people were literally along the whole axis. The staff handling routine functions were grouped pretty close together near the status quo – they were already doing a good job. The staff responsible for program were right in the middle knowing they had some excellent things going and they also



## VI. Change vs Status Quo: Worksheets for Strategic Planning

had to do some important new things. The staff responsible for fundraising were halfway between the middle and complete change – they knew they had to stimulate significant changes in order to achieve the increased revenues identified in the three year plan. The executive director (that’s me) was wandering all about spending time with each of the different groups but with a bias for change.

Suddenly people realized that the chairman of the board was also participating and that he’d gone beyond the change everything point. He shouted in from the hallway, “I know you’re all doing a great job but everyone has to change a bit and some have to change a lot.” He then looked at me and said, “Organizations that don’t grow die. Executive directors that don’t create change leave.” I moved farther out toward him on the change axis! For several years afterwards, literally every time I spoke with the board chair, he said the same thing again to me about change.

**Status Quo and Change**  
(Changing Nothing or Changing Everything)

**What to Change and What to Keep**

<b>Best of status quo</b> •Keep and expand	<b>Best of change</b> •Adopt and expand
<b>Worst of status quo</b> •Change	<b>Worst of change</b> •Avoid

**What to Keep & What to Leave**  
(Participatory Assessment)

What do we want to keep?	What needs to be left?	What are we not sure of?	What skills to keep?	New skills require?

What is needed is to understand that change can be good or bad and the status quo can be good or bad. The challenge is to know what to keep and what to change. You can use the two charts above to present the “Status Quo and Change” activity and to collect participants’ comments and conclusions.

Foster Parents Plan achieved remarkable results in the next six years. As the executive director, I was a strategic thinker, a ‘leap ahead’ planner. The finance-admin director was much more of a practical thinker, a ‘continuous improvement’ planner. The two of us had many serious debates and we each learned much from the other. The net result was an excellent combination of strategic leaps and continuous improvement. The organization achieved breakthroughs in its fundraising and organizational development and at the same time it made substantial step-by-step progress in improving internal operations. Many of these issues were identified and improved by getting every staff member to think through possible changes. In the finance department, mail room, and donor relations section, for example, staff identified many time-saving actions which led to great internal efficiencies.

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**To Succeed Requires Significant Changes**

1. Leadership Vision – New Priorities
2. Stakeholder Analysis – New Stakeholders
3. Strategic Positioning – Unique Value Added
4. Organizational Culture – Entrepreneurial
5. Accountability – Transparency and Trust
6. Strategy for Fundraising – Market Development
7. Board Development – Strengthening Support
8. Measured Results – Ultimately Why You Exist
9. Management of Change – Your Priority

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**Roles in Change – Is it both?**

**It is Leadership and Management**

- Establishing direction
- Aligning people
- Motivating & inspiring others
- Produces change, often extremely challenging
- Leads to long term results

- Planning/budgeting
- Organizing/staffing
- Controlling & problem solving
- Produces predictability & order
- Leads to short term results

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The organization's culture has a lot to do with how people respond to this exercise. A self-confident, innovative group of people recognize that important changes are necessary and also that some key aspects of their work need to be preserved. The activity itself usually leads people to see the importance of preserving what is working well and equally welcoming needed changes in culture, plans, and activities. The different approaches between the executive director and the finance-admin director could have been the basis of serious conflict, but the culture was one of openness to new ideas and discussion and commitment to the mission so this kind of debate was productive to good results.

Changing the culture of the organization is one of the most important management challenges and probably the most complex management challenge.

My approach to 'managing change' is to:

1. Focus on results not change
2. Identify why it is important
3. Articulate a vision that motivates
4. Incorporate it in normal planning process
5. Set individual objectives and responsibilities
6. Share (listen, communicate, involve...)
7. Measure and learn (role of Monitoring and Evaluation)
8. Lead for the vision and manage for results

**SHOCKING NEWS # 1:** A 2020 news report from the U.K. that almost half of U.K. charities for the world's poorest are set to close in a year. Survey finding: **“Demand for services overseas has risen during Covid-19 but lack of financial support will force 45% to shut their doors.”**

**SHOCKING NEWS # 2:** A 2019 study by The Concord Leadership Group reported that **49% of nonprofits lack a strategic plan**. As someone who does strategic planning with nonprofits as a career, even I was surprised by this number. This study is worth the attention of nonprofit leaders

## VI. Change vs Status Quo: Worksheets for Strategic Planning

and board members because its findings stress that basic leadership practices are not being followed in many of the world's nonprofits.

For answers to both these shocking news reports, please refer and use the lessons contained in *Strategic Planning & Culture for Nonprofits: Clear and doable steps to create motivating plans and the supporting culture you need for success* available in Amazon Books in both paperback and e-book.



Ken Phillips, strategist / consultant / mentor / author, Boston, USA

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