Promoting change in cause-driven organisations

Purpose	Provide some broad guidance as thought-starters when planning for the adoption of Open Standards
Who should use this, and with whom?	Integrators / M&E staff, and team leaders, with organisation leadership, particularly HR Managers
When	When preparing plans for pilot projects to trial the Open Standards; and continually as any adoption is being rolled out to other projects
How	Use the observations and models described here to seed discussions on how support for change can be built within the organisation.

Annette Stewart - Fulbright Scholarship 2016

**Improving the *practice* of conservation
by improving the *management* of conservation**

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Adoption and institutionalisation of the Open Standards is not a simple or mechanical process – it requires people to change their practices. As such, it is primarily a change process.

Promoting change is difficult in any organisation, but it's particularly difficult in cause-driven organisations, where people are motivated by heart-felt personal commitment rather than any tangible or external reward.

This document provides a summary of some discussions on this topic, which have focused on the behavioural perspectives that improve the chances of new practices being adopted and embedded into an organisation. The document provides only a brief introduction to the subject of managing change, and is not a substitute for professional expertise and guidance; any program aiming to adopt the Open Standards should seek expert advice.

Refer also to these related tools -
-    **Operationalising the Open Standards**
-    **Institutionalising the Open Standards**
-    **Conservation Capability Maturity Model**

Preparing for change

Adoption of the Open Standards requires a lot of attention to "mechanical" factors, such as training people in the details of the standard and implementing systems support. These types of factors are covered in other guides; this document focuses on the "people" factors involved in efforts to change practices.

Change is a Social process

HR Managers within organisations have very useful skills and insights that can help to implement changed practices. Observations arising from discussions with several HR managers are outlined below, in no particular order.   Some of these may provide a point of leverage for further conversations within an organisation.

First some high-level principles –

- Appealing to "facts" generally doesn't work; need to appeal to values.

- If issues are presented in isolation from the great work that the organisation is doing, it can be seen as highly critical or negative.

- If the new behaviour clearly offers benefits (actual or perceived) greater than the benefits obtained through the current behaviour, then change is more likely to occur.

Some more specific examples -

- Any significant organisational change requires support from leaders. However leaders are often reluctant to "mandate" a change, largely out of respect for the commitment and effort that is continually demonstrated by staff.   Experience with some pilot projects suggests that this can be best tackled on two fronts-
    - o Demonstrating to leaders that the new approach has clear benefits, that outweigh the cost of transition
    - o Building support for the change amongst a few key individuals, helping to generate a "groundswell" of change that leaders can then more actively support

- Implementing new practices requires people to change the way they currently do things, yet most people are already over-stretched and often don't have the time to contemplate new ways of doing things.   Any change has to have clear benefits over current practices; identifying and communicating these benefits is a good start.

- Many of the benefits from using the Open Standards flow to people other than those who need to adopt the new practices. Aim to identifying the benefits to the individual, and those that flow to others, and appeal to the "greater good". For example –

    - o using OS should lead to higher quality strategies, with a testable theory of change and identified measures for monitoring progress, which over time allows objective analysis of results and further adaptations to continually improve the quality of the plan. This is a direct benefit to practitioners.

- - - Using OS across an organisation's projects creates a common language and consistent, high-quality project information, which makes it easier for fundraisers to communicate the project to potential donors, which in turn increases the likelihood that sufficient funding will be obtained. This is a direct benefit to fundraisers in terms of a more efficient workflow, but also with flow-on benefits to practitioners in terms of better resourcing for their project.

  - Some of the "greater good" reasons for adopting OS include –

    - Project details can be more easily shared, which contributes to broader learning by others, within the organisation and within the broader conservation sector

    - Improved efficiency in any process means that resources are being saved somewhere within the organisation, which ultimately means that there are more resources available for the core work of the organisation – conservation.

    - Ability to share project information creates more transparency, and more awareness of the project;

- It's not about "culture change" – the culture in most cause-driven organisations is generally strong and a great asset. Changes to practices are more about behaviour change –leveraging all the good parts of the culture by positioning the change as enabling the organisation to do better work, and more of it with their limited resources.

- Any change needs to shepherd people in the right direction; if they are "directed" they will likely disengage.   Best to get people discussing current issues and to collectively agree that there's a problem, and the nature of it, then start talking about possible solutions.

- When existing projects are first transitioned to the Open Standards, the rigour of the standards will likely reveal some gaps in the logic or execution of the current work. This can be demotivating – or infuriating – for the project staff who are no doubt working hard to make their project a success. If possible, a good approach might be to gradually transition the project to the new standards and improve the quality of the project over time, by following around the steps in the open standards loop. Clearly, if the project is having negative impacts, or significant resources are being wasted, then the situation needs to be addressed more actively.

- Conservation practitioners are well versed in the concept of Adaptive Management, through which projects are continually improved. Introducing new practices such as OS can be viewed in a similar light – adapting practices based on what is working elsewhere. The Adaptive Management philosophy also promotes the perspective that "change is constant", and not something to be feared or avoided.

- People are more likely to adopt new practices when the change is supported by people whose opinion matters to them. Involve respected peers in early trials, so that the project benefits not just from their direct contributions, but also from the later influence that their opinions can carry.

- People are more likely to adopt new practices when it can be done with a minimum of hassle, logistical problems, or unnecessary extra steps. Aim to identify and remove barriers, help people easily gain the new skills, and provide support until the practices become the new norm.

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Rare's Theory of change

"Rare believes people will change their behaviour when they understand the benefits of a new behaviour and the barriers to its adoption are removed"

Rare run conservation projects all around the world, with a particular focus on inspiring people by appealing to hearts and minds through proven marketing techniques. Their Pride campaigns are built on a solid foundation in theories of social marketing, and projects are designed with a clear theory of change as to how they will change behaviour to achieve a conservation result.

While Rare's work is focussed on achieving particular conservation results, the theories provide useful guidance for achieving any result that is primarily dependant on behaviour change. Changing conservation practices is highly dependent on behaviour change.

The concept is defined in detail in Rare's Theory of Change guide. In summary, applying this process to an OS adoption project implies starting by identifying the behaviour change desired, then identifying and removing the barriers that are holding up that change, and continuing to work backwards up the chain to imparting the knowledge required.

Many OS adoption projects start at the wrong end - by communicating knowledge and expecting behaviour change to occur. This fails to influence attitudes and behaviours, and hence adoption is slow or incomplete.

Traditional change management guidance

Most of the published change management guidance relates to commercial organisations, and has limited applicability in cause-driven organisations where people are motivated by deep personal commitment rather than external or tangible rewards. "In cause-driven organisations you tend to get softer people, so need a softer approach."

One possible exception is the Kotter 8-step model and related "Accelerate" book which draws some inspiration from Agile concepts. This model is well known in business circles, so it may be a concept familiar to the organisation's leadership.

It pays particular attention to empowering people to take action, and identifying and removing the barriers.

It does, however, assume that the change is driven by organisation leadership, which is often not the starting point in projects trying to adopt OS.

Regardless, the detailed guidance might help in particular circumstances. For example, it encourages –

- forming a large volunteer army from up, down, and across the organization to be the change engine
- functioning in a network, flexibly and agilely outside of, but in conjunction with, the traditional hierarchy; and
- painting a picture of what the future could look like – "The better people can envision where they are going, the more they can focus on specific initiatives that will make that vision a reality".

Some Suggested References

Ideally you should seek expert guidance, but if you don't have resources for this type of support then the following references might help to generate some further ideas -

- The discipline of Behavioural Economics looks at how people make choices, and offers insights on how to get people to change their minds and their practices. One example is the concept of "Nudging" (refer here for a short overview), in which actions aim to help people without compulsion – to gently guide them towards a particular behaviour that is better for them and "the greater good", but always leaving open the option for them to choose another course.

- The Frameworks Institute offers resources that outline how they do policy-level research to identify the challenges that are likely to confront the introduction of new policies, to anticipate barriers to support, and to develop strategies to overcome misunderstanding. While it is focused at the public policy level, their guides seem relevant for framing communications within the smaller scope of an organisation (for example, see the Checklist in this guide).

- This blog focusses on communication styles, often with an environmental flavour. This post explains neatly why using rational debate is not the way to change behaviours - "you put facts in front of them about problems and solutions, have a reasoned debate, persuade them of a different point of view, then they change their position and their behaviour. Right? No. . . . Humans have the *capacity* to be rational decision-making creatures. But for most of us, most of the time, we're not. We run on habits, worldviews, prejudices, emotions."

- The Community Toolbox has a useful reference, from the social marketing perspective, on Promoting Behaviour Changes by Making It Easier and More Rewarding. It is focussed on getting people to buy your product, but much of the information is relevant to selling concepts that require behaviour change, such as adopting better eating habits, or better conservation practices.