

# 9 Tips for Managing Effective Human-Centered Change

## A GUIDE FOR GRANTMAKERS

Humans are at the center of every change your organization makes, whether that’s adopting AI-enhanced tools or updating a grant application. And each person has a different perspective, experience, and comfort level with change that can help—or hinder—adoption.

As change happens faster, it becomes harder to take the time to identify which changes make sense to incorporate in your organization. By the time you’ve reviewed the risks, understood the implications, and decided on a plan of action, there is NewThing 2.0 to consider. This pace creates more anxiety among your staff and can introduce more risk to your organization.

To make change is to manage change. If you want to be a change maker, you first must know how to manage not only the tools but also the people at the center.

During the webinar, [Investing in the Human Side of Change Management](#), Chris Delatorre, independent consultant, and Michael Reardon, Change Management Lead at Blackbaud, share why the human element is the most important part of change and how to develop change management champions to ensure a smoother adoption process.

### What Do We Mean by Change Management?

Change management is how we prepare, equip, and support individuals to successfully adopt a new process, tool, or structure to drive organizational success and outcomes.

Good change management is good leadership. It involves listening to your team and the industry, creating a realistic strategy, and communicating it so everyone understands the goal.

Approach change management as a compass—not a map. It gives you the direction, and the flexibility to reach your goal at the pace your organization needs. Because change management is not a destination. As soon as you incorporate one new process or tool, there will be another following closely behind. Avoid unnecessary expediency and instead focus on intentionality.

### 9 Tips to Prepare for Human-Centered Change

#### 1. CLARIFY YOUR PURPOSE.

Know the “why” for the change. Be able to clearly and succinctly explain the gap, problem, or obstacle that you’re solving and how this aligns with your organization’s goals. The purpose will be the foundation of your change. Your policies and processes will build from there, and it will influence the platforms you use to reach the desired outcomes and the expert partners you identify to help.

## 2. KNOW YOUR ENVIRONMENT

Evaluate how this change works in the broader market. AI is making headlines but do the research to know how it fits in with your organization and industry. Understand how your peers and other philanthropic organizations are using it. How do your team and organization fit within those market shifts? Identify how this will affect your team. Will it save them time? Will it help you grant more dollars?

## 3. COMMUNICATE YOUR PURPOSE

Tell your audience the reason why you are changing. Guide people through the emotional shifts as much as the skills they need to learn. Share the background and avoid generalizations like, “We will be left behind.” If you don’t tell your stakeholders in a way they can understand, they will fill it in themselves. It’s how the brain makes sense of the anxiety that comes with change.

## 4. IDENTIFY YOUR STAKEHOLDERS

Whether you are adopting AI-enhanced email functionality or launching a new funding program, you have different stakeholders who will be affected by the change. Know who those stakeholders are—internal staff, partners, board/senior leadership, your grantees—so you can craft messaging based on what each group needs to know.

## 5. TAILOR YOUR MESSAGE TO YOUR AUDIENCES

Translate the why into a way that matters to each audience. Start with understanding what each group values the most. Is it better communication with grantees? Is it driving measurable impact to your community? According to Michael, you need to spend 40-50% of your communication making sure your audience understands the problem and agrees that it needs to be addressed. If they don’t agree that there is a problem, you will have trouble with adoption. As Chris mentioned in the webinar, “Empathy is a best practice in communicating in the 21<sup>st</sup> century.”

## 6. CREATE FEEDBACK LOOPS

Build in ways for your stakeholders to provide feedback before, during, and after adoption to make sure you hear and address questions. This can help you address resistance early and provide clarity or solutions before it becomes a roadblock. Remember, your smartest, most engaged employees are often the ones who push back.

## 7. RECRUIT EXPERTS

Identify partners to serve as experts to help guide your process. These may be external partners such as peer organizations who have already gone through this change. Also identify internal experts as well. Find people with a pulse on your industry and who are connected and respected throughout the organization. These are your change champions.

## 8. CELEBRATE YOUR WINS

Highlight the people who are embracing and adopting the change. Be specific and call out the skills, competencies, and results that set them apart.

## 9. RECOGNIZE CHANGE FATIGUE

Know when to say “no” and deprioritize a project when too much change is happening. One webinar attendee

mentioned that they put a hold on changes to their grant application for two years so the team could focus on really learning and understanding the process.

## Managing AI-Driven Change

AI is causing a lot of anxiety. It's moving quickly and it's not always easy to understand how it works, but it has the potential to improve processes across your grantmaking organization. That's why it's more important than ever to prioritize and fine-tune your change management strategies so you always have a clear direction, no matter how technology evolves.

If you'd like to learn more about incorporating AI into your grantmaking organization, check out TAG's resources for responsible AI adoption in philanthropy: <https://www.tagtech.org/ai-resources-for-philanthropy/>.

## Learn More

Current members can view recordings and resources from TAG's 2024 Annual Learning Series in the [Webinar Archive](#).

## Funding For This Series

This series is funded by [Blackbaud](#).

For powerful grantmaking-related knowledge and insight for you and your organization, you can support our partner by attending their live, online events within their Blackbaud Grantmaking 2024 Thought Leadership Webinar Series. [Learn more and register to join](#).

**blackbaud**<sup>®</sup>