

Enabling Change SIG AGM Chair's Report

6th June 2017

Introduction

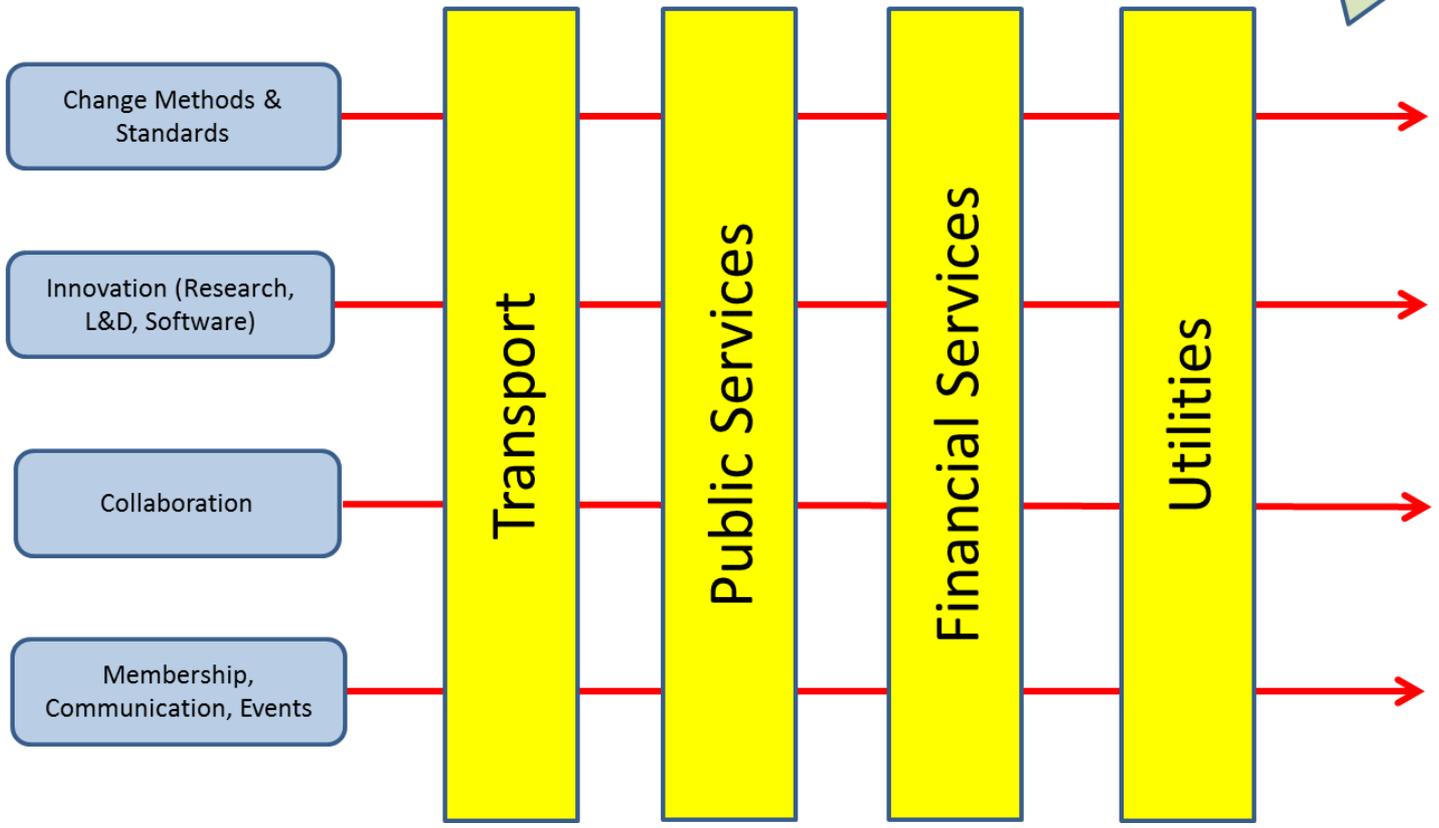
- *Mission is to improve the change capability of organisations, teams and individuals*
- *3rd year completed*
- *502 members*
- *SIG is organised around:*
 - *Themes*
 - *Industry-focused Change Practitioner Groups*
 - *Transport, Public Services, Financial Services, Utilities*
- *First publication “Introduction to Managing Change” scheduled for August 2017*

Organisation



Themes

Practitioner Groups



SIG Committee 2016/2017

- Chair – Martin Taylor
- Secretary – Tim Beaumont
- Change Methods & Standards – Samantha Davey / Donna Unitt
- Innovation – Parag Gogate
- Collaboration – Bakr Zade
- Membership, Communication, Events – Elisabeth Goodman
- Transport Change Practitioner Group – Simon Williams
- Public Services Change Practitioner Group – David Packham
- Financial Services Change Practitioner Group – Kevin Minton
- Utilities Change Practitioner Group – Lorraine Lane

Change Methods & Standards

Theme Scope: To build the understanding and capability for managing all types of change programmes by documenting and facilitating the sharing of related information, reference sources, case studies and lessons learned.

Obj	Action	Timing 2017/2018	Notes
1.	Keep the Change Methodologies publication up to date / current in line with the Introduction to Managing Change Publication		
a)	Keep the Change Methodologies document up to date	March 2017	V2 & V3 updated in line with the publication Introduction to Managing Change
1.	APM Competency Framework – Review and Recommend Change Management Entry		
a)	Create a Change Management Competence Entry	June 2017	Draft circulated for review
b)	Review the existing competences and make recommendations for incorporating change management into them	September 2017	Review and update, circulate for feedback and agree the way forward
1.	Review and update existing Resources		
a)	Headings for representing the change capabilities / methods V3 Jan 15	December 2017	Review and update and reissue
b)	Library of professional knowledge / Reference sources V2 Jan 15	March 2018	Review and update and reissue
c)	Change Management press and ref library May 15	March 2018	Review and update and reissue
d)	Common vocabulary V1 Jul 14	March 2018	Review and update and reissue
e)	Change Management Horizons Nov 15	June 2018	Review and update and reissue

Innovation

3 key areas – Research, software, learning & development

- **APM funded volunteer research project report 2016 is now in the final stages of being published**
 - **The primary scope of the research was to ‘Developing A Tool to Improve Project Productivity’ by Enabling Project Practitioners to Identify and address Human and Organisational Dynamics**
 - The release comprises of 3 documents for the benefit of members and wider community
 - A research report
 - Productivity toolkit
 - NORM table
- **We announced a new ‘Change Pulse’ survey in November 2016 focusing on change methodologies, success factors and measures. The research findings is now in the final stages of being published and the key objectives of this survey were:**
 - To understand the primary and secondary drivers for planned and managed change.
 - To identify the various change model and methodologies used to manage change.
 - To understand the perception of participants around the factors for successful change that the Enabling Change SIG has been working on.
 - Establish how success of change initiatives is measured and the range of criteria used.
- **We also submitted a proposal for 2017-18 research fund, which was unsuccessful. The proposal was to develop a toolkit for managing change, which was also one of the recommendations from the transport practitioner group.**
- **Findings from the 2017 change pulse survey will inform the key areas this theme would focus on in the coming year.**

Collaboration

This Theme was focused on collaborating with other organisations that have Change Communities in place, such as the British Computer Society, to develop our community and share experiences and knowledge.

Initial engagement took place with some organisations but subsequent development did not occur for a variety of different reasons.

Other organisations were identified but engagement proved problematic.

The scope of this Theme will be reviewed in 2017/2018.

Membership, Communication, Events

Area	Objectives	Timing	Update
0. Evaluation of our Membership, Communications and Events strategy	Monitor the effectiveness of our membership, communications and events strategy.	Propose a 2016-17 evaluation strategy based on the ABCDE appendix and the objectives for this year for review at Nov committee meeting.	The evaluation strategy was created and used as a framework for reporting against at each SIG committee meeting.
1. Membership			
1.1 Monitor growth in membership – current target is 500+	Monitor numbers and explore ways to continue to stimulate growth.	As part of business update at each committee meeting.	Numbers were monitored and reported on at each SIG committee meeting. We reached our target of 500 in May.
	Continue to obtain and review quarterly data from HQ on how our membership overlaps with branches and SIGs	April, July, Oct, Jan	Quarterly data obtained, posted in ProjectPlace and reviewed at committee meetings
1.2 Monitor requirements and development in capability	Assess / instigate the use of periodic surveys to inform us of member requirements and development in capabilities	Agree timings at Sept 2016 committee meeting.	This is on hold for review in 2017-18 committee year as timing in 2016-17 was not right given other surveys taking place
	Monitor and review replies to additional questions for our SIG in event feedback surveys	After each EC SIG supported event.	Tracked in ProjectPlace and reviewed at committee meetings
	Invite feedback as part of all our communications e.g. newsletter, events, social media, web postings	Ongoing - part of each communication.	Ongoing

Membership, Communication, Events

Area	Objectives	Timing	Update
2. Communications			
2.1 Reinforce and amplify the work of the themes	Identify major milestones for each theme and develop plan for how these can be reflected in our various types of communication / events.	After Sept 2016 meeting, and for Oct meeting .	Plan documented in ProjectPlace though have not been applying it as well as we could
2.2 Issue a regular newsletter to members	Work with the committee to produce a regular newsletter that reinforces key messages from each theme, supports membership goals (above) and promotes our events.	Newsletter schedule: <ul style="list-style-type: none"> • 21st Oct for 4th Nov • 20th Jan for 3rd Feb • 21st April for 5th May 	Completed broadly on schedule
2.3 Investigate the use of social media	Use the APM Social Media strategy as a starting point to set up a SIG social media strategy to support the ABCDE strategy in the Appendix.	Use APM LinkedIn group and committee members' social media accounts to promote and support SWWE event in first instance. Draft fuller strategy for review at Oct meeting .	Full strategy documented in ProjectPlace. Have been using LinkedIn and have created a Twitter account. Limited time available for volunteer activity has meant this has not been used as fully as it could be.
2.4 Communication relating to events	Ensure members receive as much communication as possible (in addition to event flyers) to notify them of upcoming events, and to share outcome of events.	Develop check-list of communication steps for events for review at Oct meeting (see also 3.2)	Done and posted in ProjectPlace
2.5 Website	Ensure website is a comprehensive and easy to navigate port of call to support our target audiences and behaviours we wish to support.	Review website once new APM website in place to recommend changes 4Q16	Done – new placeholder set up on home page for easier access to our resources.
2.6 Hard-copy publications	Provide support as needed for publication of our Introduction to Change guide.	Target for publication is May 2017	Done – authored section on key success factors

Membership, Communication, Events

Area	Objectives	Timing	
3. Events			
3.1 Manage the SIGs schedule of events	Work with committee and APM members as needed to ensure that we have a well-supported and well-filled schedule of events.	Update available for each committee meeting.	2016-17 events schedule was very full. 2017-18 schedule limited by cut-backs in budget for SIGs, however a fairly good schedule is emerging for the rest of the year. List is documented in ProjectPlace
3.2 Coordinate and/or support arrangements for individual events	Ensure that committee members have the guidance and support needed for planning, delivering and following up from events	Develop check-list in conjunction with 2.4 for review at Oct meeting .	See 2.4

Change Practitioner Groups: Transportation

The Transportation Change Practitioner Group has continued to pioneer the Enabling Change SIG's approach to working with industry practitioners during 2016/17. The group comprises senior representatives of all the main operational transport activities including rail, aviation, buses, shipping and logistics, along with experts including an academic and a leading author in the field of change management. Since its inception in early 2015, the group has developed a map of sector challenges, shared good and bad practice through case studies from each organisation, exchanged research and frameworks, and identified a number of strengths of transport organisations which can support successful change delivery.

All of this has been brought together in a report which was presented to senior APM representatives at a meeting hosted by Transport for London (TfL) in October 2016. The group's members found many common areas where their organisations were independently adopting similar approaches, which APM could potentially share more widely. The report proposed a dozen recommendations under four themes: 1) competence, roles and training; 2) methods, tools and terminology; 3) business cases and measures; and 4) stakeholders and requirements. Many of these recommendations are now being progressed by the Enabling Change SIG, for example through providing input to the APM Competency Framework and the SIG's "Introduction to Managing Change".

Change Practitioner Groups: Transportation

A particularly interesting opportunity identified by the Transportation Group would be the potential for APM to develop and offer a “change toolkit” for corporate members and change practitioners. Many organisations are currently investing in independently developing their own similar materials, so a common framework could provide real benefits in efficiency and consistency. The Enabling Change SIG made a bid to the APM Research Fund to investigate existing toolkits as a first step in this, but unfortunately this bid was unsuccessful and other options to progress this opportunity are now being explored.

The key focus of the Transportation Group’s next phase of work is sharing knowledge more widely, with an event planned for 21st June near Heathrow Airport in conjunction with Thames Valley Branch. This will showcase the group’s work to date and give attendees the opportunity to explore some of the key issues with delivering large scale change programmes in a high volume 24/7 operational environment, using a real case study from British Airways. Delegates will have the opportunity to discuss some of the key issues involved and feed back into the wider debate. It is hoped this will lead to further topics of interest for future work, and provide an opportunity to widen participation.

An article on the group’s work to date and recommendations has also been prepared for “Project” Magazine. However, unfortunately this has not been accepted for publication and other communication channels to widen access to the group’s work are being actively considered.

Change Practitioner Groups: Public Services

1. Evolving the group with an expanding membership from variety of backgrounds in public sector, incl. academia, consultancy, NHS, British Council, HMRC and local government

Whilst we have lost a couple of members and a few leads did not materialise, we have also gained members from the same sector, through working closely with members of the British Council and HMRC on the public sector research report, and other members have come forward for group membership.

2. Developing discussion topics: Democratic Context, Regulation, Leadership, Accountability to form hypotheses around the twin themes of:

- How does accountability impact the delivery of change within public services?
- How does the public sector align its organisational capability to public value?

The discussion on both the above themes, initially in May 2016, and the meetings that followed, led to a resolution to complete a survey and the research piece that followed.

Change Practitioner Groups: Public Services

3. Inputs and outputs

- Survey of APM / PPM professionals and Change Management experience in conjunction with the Enabling Change SIG's Innovation Theme and the emerging Change Guide
- Developing research topic to provide anecdotal evidence or counterfactuals to the hard data from the survey, building on 1:1 interviews completed over the summer
- Collaboration with other Practitioner Groups and Knowledge SIG for event in Autumn/Nov.

Change Management Practitioners and executives were interviewed and the research, undertaken between July and October 2016, resulted in a report into the key success factors for change within the public sector. This was published by the APM on 18 May 2017 as 'The successful Delivery of Change in the Public Sector: Getting It Right': see link.

<https://www.apm.org.uk/news/research-report-change-in-the-public-sector/>

We are now planning to reinvigorate and extend the group's membership through the success and interest generated by the report.



Change Practitioner Groups: Financial Services

The Financial Services group was restarted following a dormant period and Terms of Reference agreed and new members engaged.

However the group lead has recently taken on a new role in their organisation and therefore we are looking for a new Committee member to take this forward in 2017/2018.

Change Practitioner Groups: Utilities

Change Practitioner Report - How Change is Facilitated in the Utilities Sector (working title):

Mind map and SWOT analysis to be developed.

Survey the APM Change Management Utilities community to obtain their guidance on the issues most important to them possibly using some of the questions posed in the scoping document produced by Kevin together with some of the SWOT/Mind Map content in terms of potential priorities relating to the threats identified. One key output from the report would be 'what do we as change practitioners need to consider or do differently' and to identify the elements of change practitioners see as the most valuable within their own change programmes.

The initial survey could also provide a dual benefit by way of some publicity for the group and our programme of work.

Assess the change frameworks/tools referenced in the APM Introduction to Managing Change publication in terms of their relevance and use within Utilities.



“Introduction to Managing Change”

A key priority for the Enabling Change SIG in 2016/17 has been to develop its first publication, “Introduction to Managing Change.” This is a major new addition to the APM’s publication suite, introducing the importance of managing change effectively in order to successfully deliver and realise the benefits of projects, programmes and portfolios. It introduces the key principles and practices of change management in the context of the latest research on key factors in successful change, as well as providing guidance on different change management methodologies and highlighting available resources.

The publication has been written by the 2016/17 Enabling Change SIG Committee Members, with contributions and feedback from a large number of experts. In particular input was provided by the Benefits, People and Programme Management SIGs, as well as through joint events with the Branches in the North West and South Wales and West of England. The “Introduction to Managing Change” also features a Foreword by Professor Tim Brady from the Centre for Research in Innovation Management at the University of Brighton.

With the final stages of production now in progress, it is planned to launch this exciting new source of expert information for APM members in August 2017.



End