

MANAGING *Change...*



...Considerations & Practical Actions For Boards,
Chief Executive Officers & Senior Management Teams

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Terminology Is Understood But Its Practical Application Is A Challenge

Change:

- * transition or substitution
- * to make a shift from one to another
- * moving from one state to another.

Change Management:

- * a structured process, wherein the proposed changes are planned, implemented, monitored and reviewed, such that they impact on individuals, teams and/or the organisation.

The Change Challenge

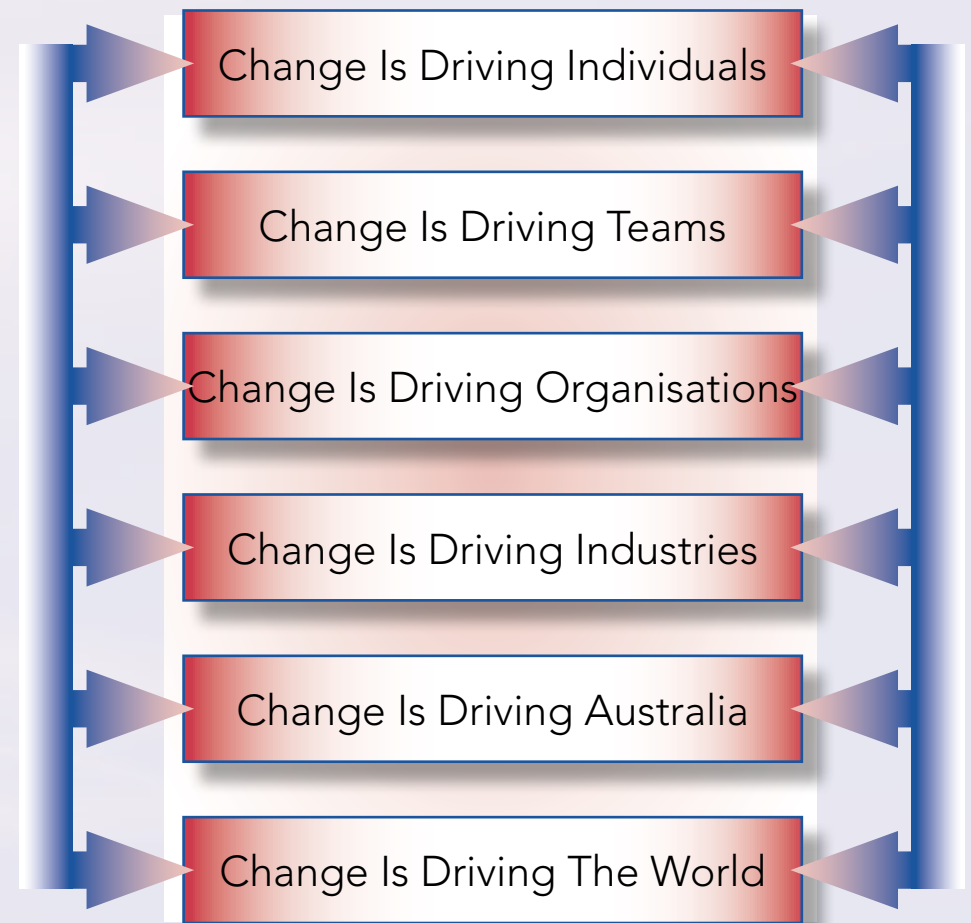
The terminology of change and change management is generally well understood, but its practical application is a challenge.

Change, Widely Acknowledged & Happening At Every Level

It is widely acknowledged by Board members, Chief Executive Officers and senior managers that change is a constant.

It is also acknowledged that change is dynamic and is happening at all levels and at varying intensities.

Your view of change is influenced by the level/s at which you operate.



External Key Drivers & Forces Of Change Example



Internal Key Drivers & Forces Of Change Example



Organisational Change, Proactive Or Reactive, Evolutionary Or Revolutionary

Organisational change, whether it is driven in part of the organisation or in the whole organisation can be either proactive or reactive.

Organisational change can also be either:

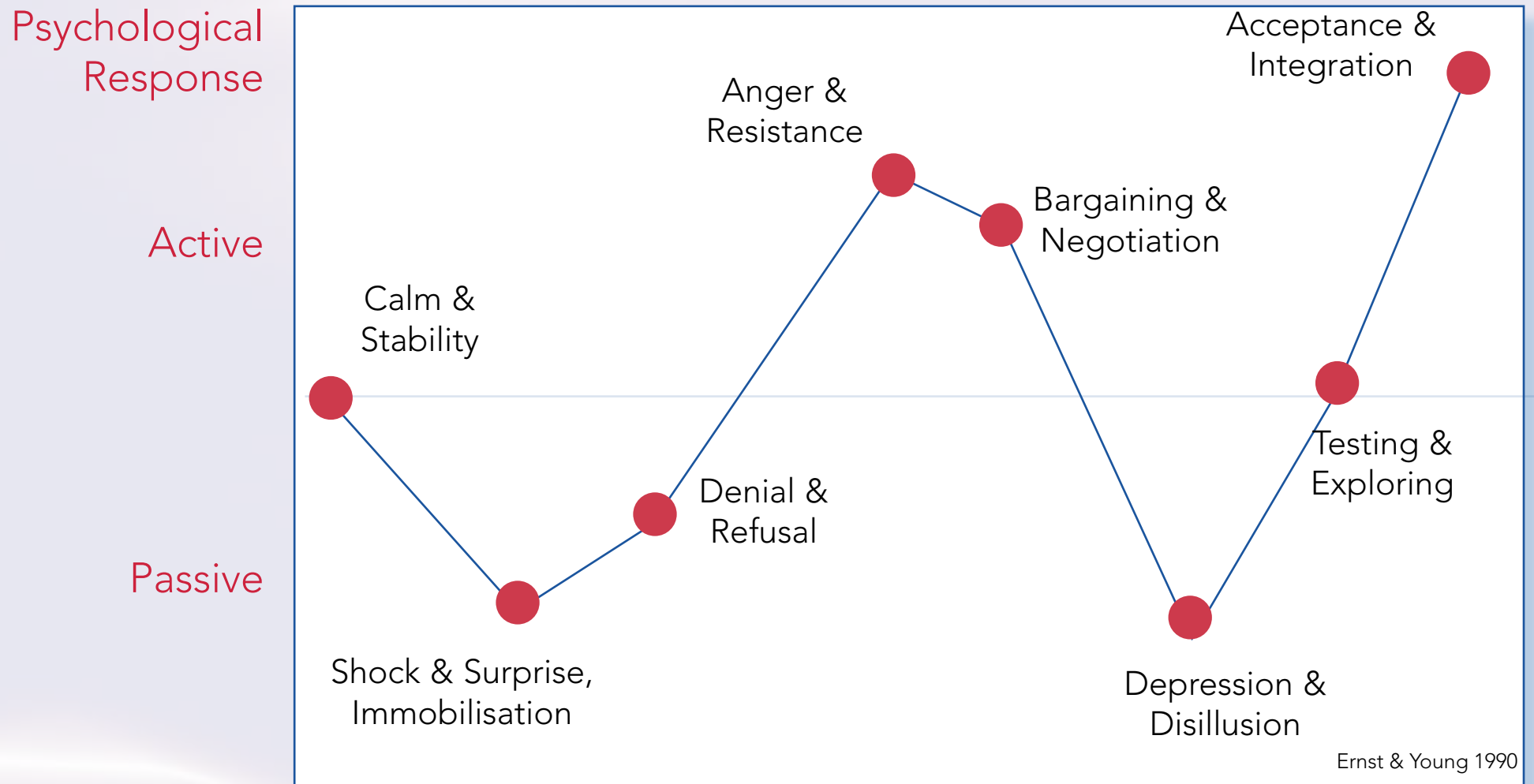
- * evolutionary, in part and over time or,
- * revolutionary, the whole and over time.

<div style="text-align: right;">Mode</div> <div style="text-align: left;">Approach</div>	Proactive	Reactive
Evolutionary	<ul style="list-style-type: none"> • Planned • Engaging • Sequential over time • Successful results 	<ul style="list-style-type: none"> • On the back foot • Tends to be spasmodic • Poor results
Revolutionary	<ul style="list-style-type: none"> • Planned • Holistic • Tends to happen in a short time frame • Good results 	<ul style="list-style-type: none"> • Limited planning ad hoc • Crisis mentality * Poor timeframes • Poor results

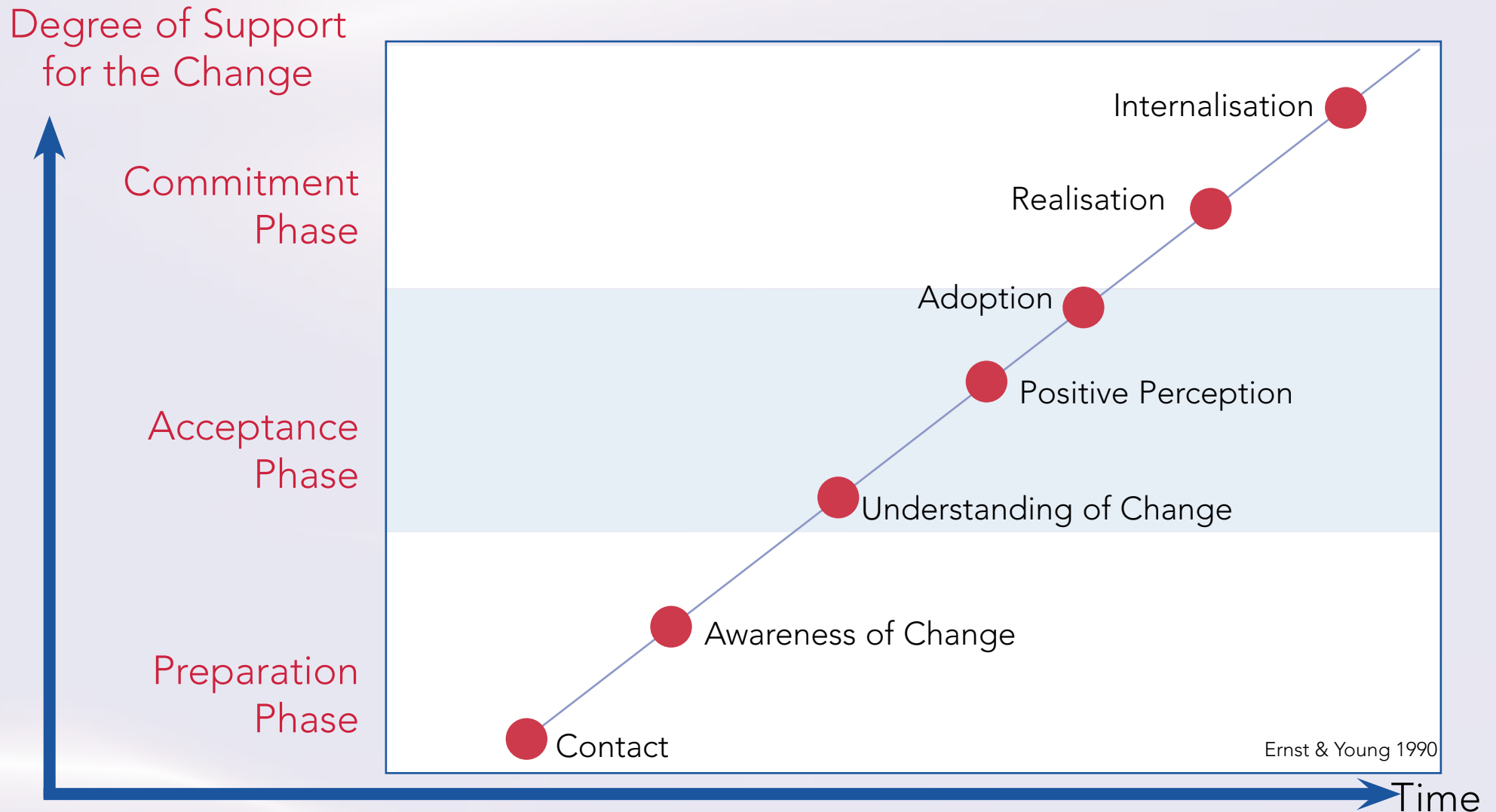
Feelings & Thoughts For The Individuals Involved In Change

Negatives			Positives		
Fear, Scared	Denial, Refuse To Believe	Been There Done That	Opportunities	Enhancements & Improvements	Professional Growth & Development
Job Redesign	Anger, Frustration	Won't Work, Can't Work	New Ideas, Outside The Square	A Fresh Approach	Organisational Growth & Development
Potential Job Loss	Cannot See The Big Picture	Challenges, My Values/ Philosophy	New Ways of Working	Challenges Sacred Cows	Exciting & Interesting
Not Enough Detail For Me	Stress/ Stressful Negatives	My Mindset, My Way Is The Only Way	Promotion, A New Job	Innovation & Creativity	A New World, A World of Options
Negatives			Positives		

Individual's Psychological Response To Change



Individual's Stages Of Commitment To Organisational Change



Strategic Risks Of Developing & Driving Change

Strategic Risks	Threat Rating Over Time			Key Strategies to Minimisation & Mitigation
	2007	2008	2009	
Poorly designed, documented and implemented Change Management Strategy, processes and expected outcomes.	L-M <i>Best Case</i>	L <i>Best Case</i>	L <i>Best Case</i>	<ol style="list-style-type: none"> 1. Document the Change Management Plan 2. Use GANTT Charts. 3. Board signs off the Change Management Plan.
	M <i>Worst Case</i>	M-H <i>Worst Case</i>	H <i>Worst Case</i>	
Failure to engage and communicate to all internal and key external stakeholders.	H-M <i>Best Case</i>	M-L <i>Best Case</i>	L <i>Best Case</i>	<ol style="list-style-type: none"> 1. Agreed change management process. 2. Communications Strategy developed and used. 3. Regular, consistent and open communications.
	H <i>Worst Case</i>	H-H+ <i>Worst Case</i>	H++ <i>Worst Case</i>	
Failure to robustly implement, monitor and review the Change Management Plan.	M-L <i>Best Case</i>	L <i>Best Case</i>	L <i>Best Case</i>	<ol style="list-style-type: none"> 1. Change Management Plan documented. 2. Board Agenda; monthly/quarterly monitoring. 3. Board Annual Program of Work.
	M-H <i>Worst Case</i>	H-H+ <i>Worst Case</i>	H+ <i>Worst Case</i>	
Failure to adequately cost, resource and support the Change Management Plan.	L-M <i>Best Case</i>	M-L <i>Best Case</i>	L <i>Best Case</i>	<ol style="list-style-type: none"> 1. Strategic Financial Management Plan. 2. Human Resource Capability & Capacity Plan. 3. Change Management Plan aligned to Strategic Plan.
	M-H <i>Worst Case</i>	H-H+ <i>Worst Case</i>	H+ <i>Worst Case</i>	

Eight People Process Steps To Change



Eight People Process Steps To Change

1

Establishing A Sense
Of Urgency

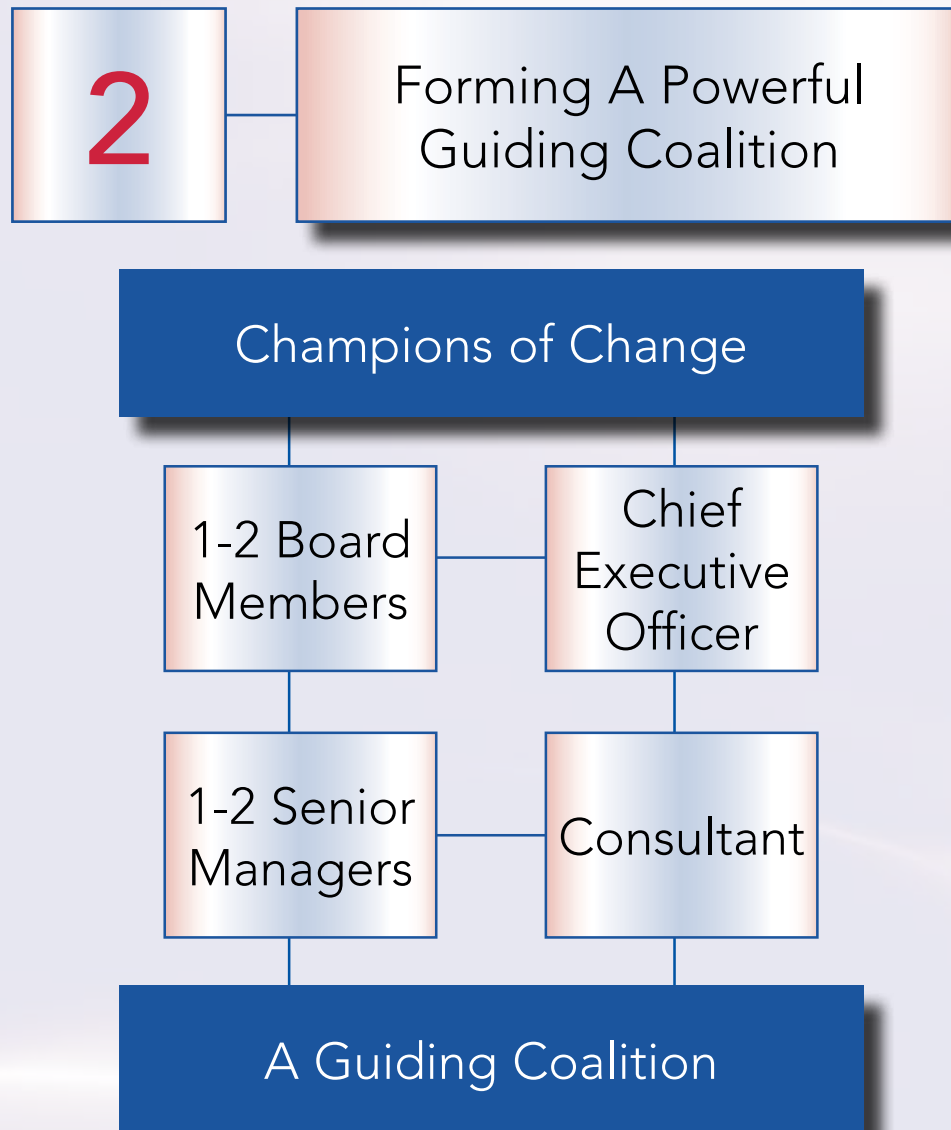
Key individuals or a small group of individuals take a hard look at the organisation, both internally and externally.

They ask the hard questions, they compare, they gather key data and information. They communicate the critical data and information dramatically, focusing on either potential crisis or great opportunities and ideas for improvement.

They create a sense of urgency and required actions that cannot be avoided.



Eight People Process Steps To Change



Champions of change come together, typically they are key individuals on the Board, the Chief Executive Officer and one or two individuals from the senior management team.

Many organisations engage external consultant/s at this step or at step one.

This guiding coalition is always powerful and gradually draws in other champions of change, who assist the cause, call for a new vision/desired future and confirm for others that change is coming.

Eight People Process Steps To Change

3

Creating A Vision,
A Desired Future



Through a unifying and collaborative envisioning process which the champions of change bring to the organisation's leadership group (the Board, Chief Executive Officer, senior management team and/or other key internal or external stakeholder representatives) an exciting and guiding vision/ desired future is developed and possibly a global strategy, key result areas, strategic objectives, timelines and performance measures.

Eight People Process Steps To Change

4

Communicate The Vision,
The Desired Future



Sequentially and continuously communicating the vision/desired future to all internal and key external stakeholders is a vital part of the change process.

Understanding, acceptance, ownership and engagement are critical success factors of the communication process.

Ensure people can see not only the vision/desired future, but their implementation progress and its successes through regular communiques eg: website, meetings, newsletters, forums etc.

Eight People Process Steps To Change

5

Empower Others To Act On
The Vision/Desired Future



Empowering others to act on the vision/desired future should be focused on:

- * establishing and creating teams or project groups who will action the various projects or activities.
- * identifying and removing barriers to change eg: lack of time, lack of resources, old tired job descriptions.
- * giving permission for people to take risks, explore new ideas, be creative and innovative and find new ways to work.

Eight People Process Steps To Change

6

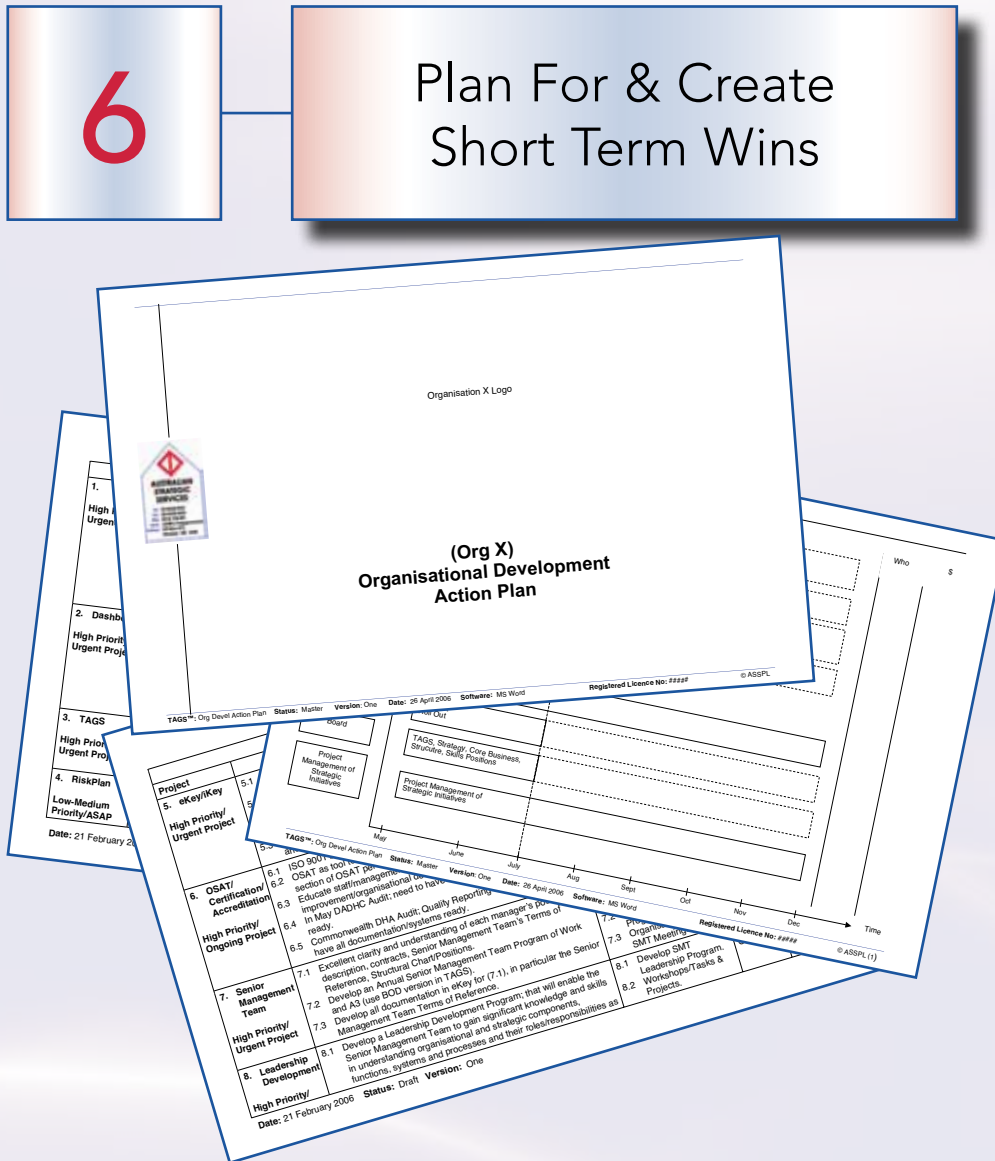
Plan For & Create Short Term Wins

Either focus on specific strategic objectives in the organisation's Strategic Plan

or

Design and develop a specific Organisational Development Plan/Change Management Plan.

Recognise and reward individuals and teams or project groups for their achievements, their time and efforts.



Eight People Process Steps To Change

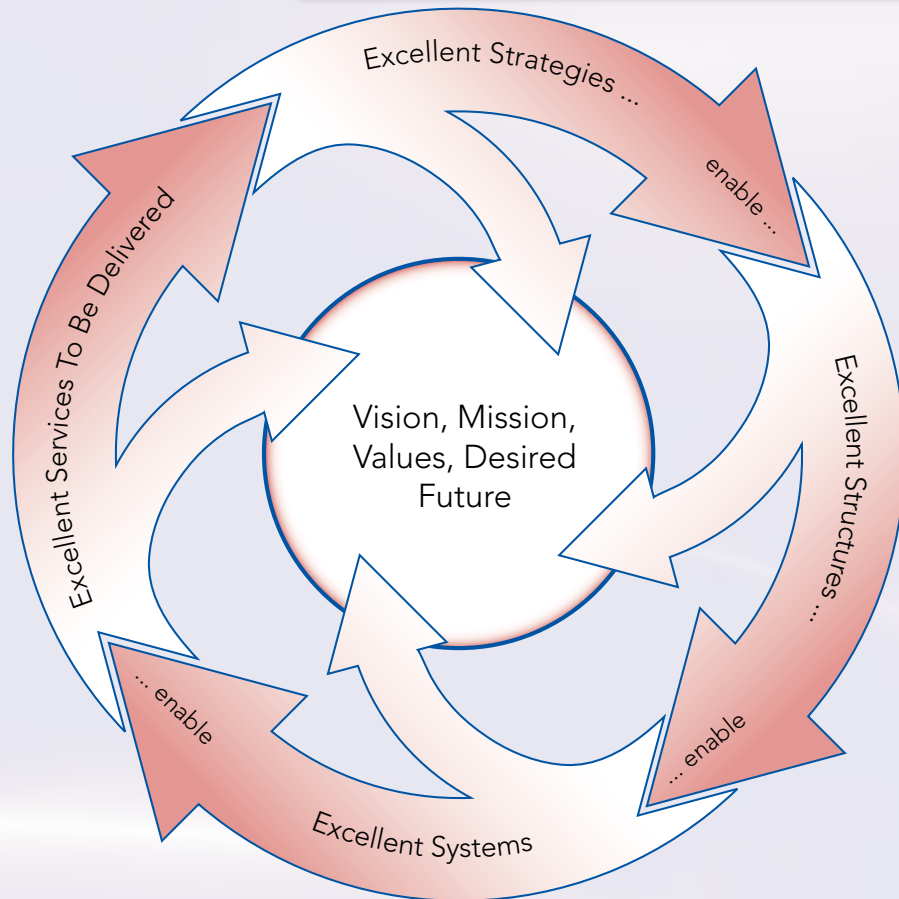
7

Consolidate Improvements,
Drive Still More Change

As the Change Management Plan/
Organisational Development
Plan is implemented, use the
achievements and widening
success and credibility to provide
and drive still more change.

Continually review the strategy,
focusing on the structure, the
systems and then the services.

Continue to promote and
develop employees who actively
communicate the vision/desired
future.



Eight People Process Steps To Change

8

Institutionalise New Approaches

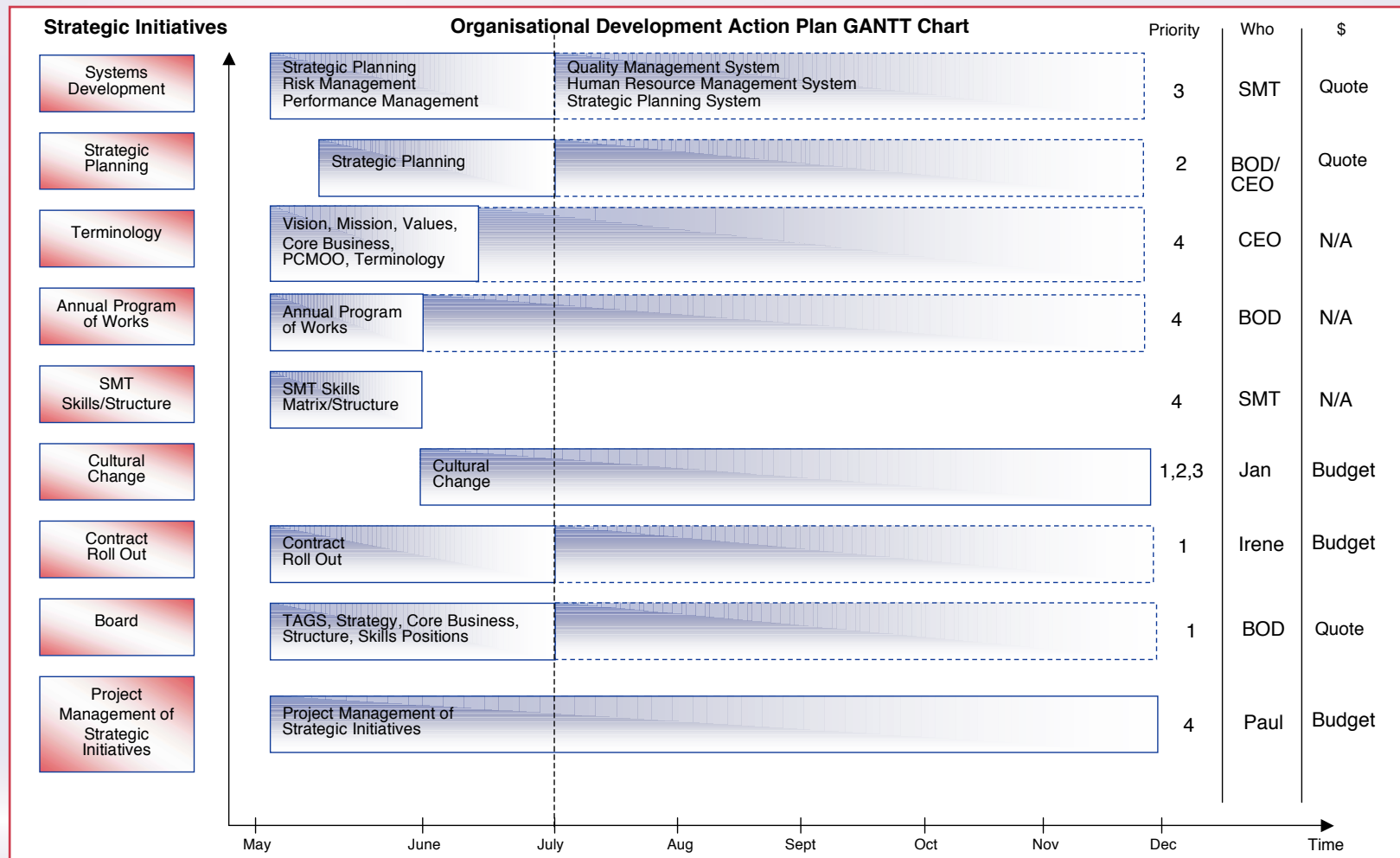
Institutionalise new approaches and processes through:

- * reviewing and updating the Board's governance policies, procedures, tools, terms of reference, position descriptions etc.
- * reviewing and updating of the organisational and operational policies, procedures, tools, templates, manuals, position descriptions, contracts/EBAs etc.

Most importantly, close the gap between the new attitudes and behaviours of the Board, management and staff and the documentation.

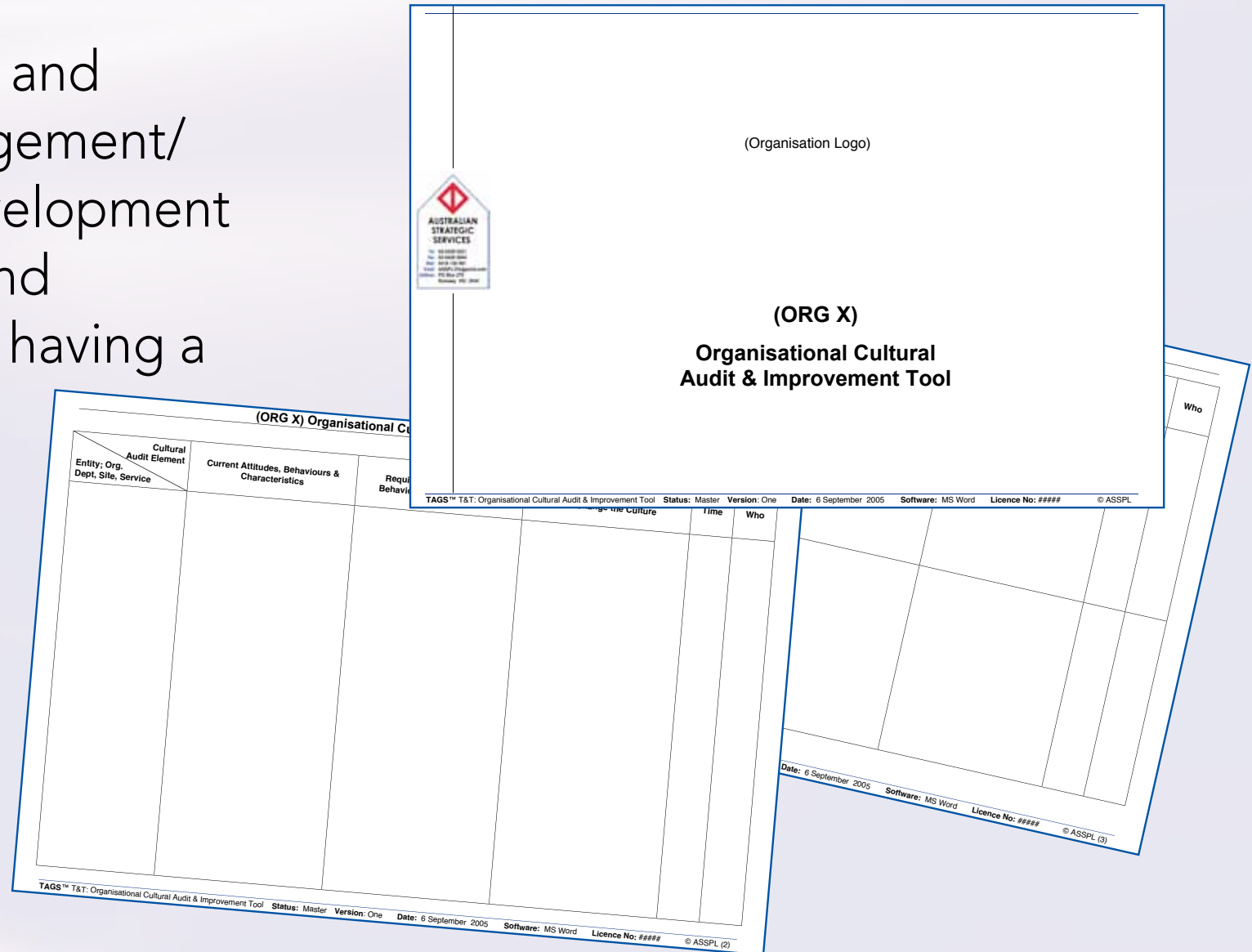


Research, Develop, Implement & Monitor A Change Management Plan/Organisational Development Plan



Use Change Management Tools, Templates & Packages

Develop or obtain and use change management/ organisational development tools, templates and packages...it's like having a bucket to carry water, it's a lot easier.



Managing The Change Process, Change Management/Organisational Development Plan

Developing and implementing the eight process steps of change is one thing...how does one successfully manage the eight steps and the Change Management Plan/Organisational Development Plan?

Bring together and use the best principles and practices of strategic planning, change management and project management.



Who Should Manage The Change Process & The Plan

There are many options available as to who should manage the Change Management/Organisational Development process

Option One

Chief Executive Officer & Senior Management Team

Option Three

Chief Executive Officer, Senior Management Team & External Consultant

Option Five

Chief Executive Officer & Quality Manager or Human Resource Manager

Option Two

Chief Executive Officer & External Consultant

Option Four

Chief Executive Officer, External Consultant & Internal Organisational Development Consultant

Option Six

Chief Executive Officer & 1-2 Senior Managers

Monitoring & Reviewing The Process & The Plan

Board:

Quarterly/Monthly
Monitoring & Annual
Review

Chief Executive Officer:

Quarterly/Monthly
Monitoring & Annual
Review

Senior Management Team:

Quarterly/Monthly
Monitoring

Staff:

Weekly/Monthly Update on
Implementation, Successes,
Achievements

Step	Agreed Actions	Timeframe	Who	Status
One	* Meeting each week * Gather data & Info	By 30 January 2007	Fred	Done
Two	* Envision the future * Create agreement	By February 2007	Mary	Done
Three	* Discuss a vision/desired future * Document the vision	By End March 2007	Fred/Mary	Underway
Four	* Communication Strategy * Meeting Schedule	By End April 2007	John	Underway
Five	* Identify barriers * Promote new ideas & ways	By End May 2007	Fred & Team	Underway
Six	* Develop an Action Plan * Reward and recognise	By End June 2007	Mary	Not Done
Seven	* Strategy, Structure, Systems & Services	By End July 2007	Fred	Not Done
Eight	* Governance documents * Organisational documents	By End August 2007	Mary/John	Not Done

Successful Change Management Projects & Processes



Ann Rough

Chief Executive Officer

Tel: 03 5032 3735

Email: ceo@alcheringahostel.com.au



Catherine Daley

Chief Executive Officer

Tel: 02 6576 0200

Email: cdaley@integratedliving.org.au



Jennene Buckley

Chief Executive Officer

Tel: 02 6685 7676

Email: jennene.buckley@feroscare.com.au



Sue Hamence

Operations Manager

Tel: 03-5023 7233

Email: shamence@madec.edu.au

Successful Change Management Projects & Processes



Paul Ostrowski

Chief Executive Officer

Tel: 03 9270 9909

Email: postrowski@careconnect.org.au



building extraordinary lives

Anne Bryce

Chief Executive Officer

Tel: 02 9034 1610

Email: abryce@achieveaustralia.org.au



David Curd

Chief Executive Officer

Tel: 07 5413 1555

Email: dcurd@communitysolutions.org.au



Empowerment through Employment

John Bateup

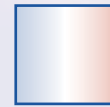
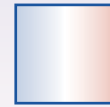
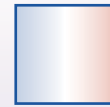
Manager

Tel: 03 8329 8800

Email: jbateup@wiseemployment.com.au

Develop A Board Change Checklist, For Example:

- * Is there evidence of the need to change?
- * Has the Board been presented with a comprehensive, practical and costed Change Management Plan/Organisational Development Plan?
- * Has the Board been involved in the strategic development of a Change Management Plan/Organisational Development Plan?
- * Are our competitors changing, what is the best available business intelligence?



- * Will the plan strengthen/renew our vision, mission, values and desired future?



- * Have we the human capital and financial resources to deliver the planned change?



- * Does our Annual Program of Work and Agendas reflect our monitoring and review roles and responsibilities?



- * Have we got unity and agreement about the need to change?



- * What is our culture today, what culture do we need tomorrow?



Develop A Board Change Checklist, For Example:

- * Has the Chief Executive Officer got the capacity and capability to plan, drive and deliver the change?
- * Do we know how this change will impact on our Strategic Plan, or is a new Strategic Plan required that will capture the desired change?
- * Are we agreed that the change better positions the organisation?
- * Will our changes enhance our quality/accreditations and continuous improvement processes?
- * Do we know how the change will impact on the managers, staff, volunteers?
- * Is the planned change in line with our Constitution/Memorandum and Articles of Association?
- * How will this change impact on our existing governance policies, procedures, tools & resources?
- * How will the changes impact on the senior management team and the work they do?
- * Have we got an Employee Assistance Scheme in place?

Meeting The Challenges & Opportunities Of Changing & Sailing The "SS Community Business

For further information, a copy of this presentation, other presentations or to discuss your board's requirements contact:

*Michael Goldsworthy
Principal Consultant
Australian Strategic Services*

03 5429 6331
0418 130 581

*office@asspl.com.au
www.asspl.com.au*

