



EPN Gatwick, UK
**“Facilitating Change: Experience and challenges
for the humanitarian sector”**

FINAL REPORT

Wednesday 13th to Friday 15th May 2009

at

Gatwick Worth Hotel

Report by Catherine Elliott

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A short summary report is available on the EPN website at www.epn.peopleinaid.org

Further details of the conference, including: an overview of masterclass and case study sessions, speaker biographies and the relationship between EPN and People In Aid are available in the Gatwick Conference Briefing Pack at www.epn.peopleinaid.org.

Executive Summary

Summary of key learning points

- Peer Learning is a powerful tool for sharing learning and building networks and can be used to surface real-time issues and questions around organisational change
- An organisation that is good at change is one that learns and manages knowledge well
- Different people will respond differently to change: identifying the various roles played by individuals can help ensure an effective process
- A number of key elements should be in place to improve the chance of a successful change process e.g. a clear vision; support by senior/influential managers; recognition/reward for change behaviour
- Communication is fundamental to an effective change process
- The term 'change management' is a misnomer – it implies that change is somehow abnormal. Organisations need to focus their efforts on coaching for adaptation in an ever-changing world
- We need to push for earlier HR involvement in change processes initiated by other departments/teams

EPN is an initiative which brings together HR practitioners and line managers to network and discuss issues related to the recruitment, retention and development of staff involved in emergency situations. The EPN conferences provide a unique opportunity for HR professionals to spend time with their peers, to share discussions on issues they face in daily practice as well as issues from the broader humanitarian sector that impact on the HR function.

Following guidance from last year's discussion, the feedback forms from participants and the evaluation of EPN Istanbul, a decision was made to focus 2009's conference on 'facilitating change' – a topic at the heart of humanitarianism, both for staff and people affected by disasters. The topic was felt to be an important one as there are few organisations in the sector that have not or are not experiencing significant change, be it driven externally by unanticipated events (e.g. tsunami, credit crunch) or by internal events such as the appointment of a new CEO or an office relocation/restructure. Such change invariably will have implications for HR practitioners whether or not they have felt included in shaping or driving any change initiative.

This year's conference saw a marked change in look and feel, with an agenda which sought to emphasise participative approaches and offer many formal and informal opportunities for participants to engage with peers. The agenda was deliberately tailored so as to elicit participants' experiences of change early on in the conference and for these experiences to shape the rest of the agenda ensuring that all those who attended got the most out of the event. The goal was to introduce participants to processes, tools and approaches which they could then take directly back to their workplace to help them be better change agents.

The participative approach was immediately apparent from day one which centred on a Peer Learning process, a powerful tool for sharing and learning which was used to surface real-time issues and questions around organisational change in the sector. On the second morning, themes drawn out from the Peer Learning were absorbed by the day's presenters to ensure they underpinned the entire conference. A series of Masterclasses run by presenters who drew on both established theory and their personal and professional experiences provided participants with the practical tools, theory, frameworks and first-hand experiences to take back into their workplace – from the foundations of knowledge management which are fundamental to effective change in organisations to how storytelling can offer a helpful tool for leaders to engage the hands, hearts and minds of those undergoing any change process. Case studies offered participants the chance to hear their peers' first-hand accounts of undergoing change and the invaluable lessons they have learned from this, including the pros and cons of a truly transparent change process and the challenges of building and maintaining ownership of the change process.

An inspirational keynote address gave participants a refreshing perspective and plenty of food for thought on the role of humanitarian organisations in an ever-changing external environment and a final group exercise

offered first-hand experience of the various psycho-dynamics one may expect to undergo when embarking on a change process.

With the focus being on the involvement of people in change, the conference also offered some fundamental insight into what HR can and perhaps should be contributing to any change initiative. It was noted early on in the conference, from experiences shared in the Peer Learning process and later touched upon by some of the presenters, that all too often HR is not fully consulted by those initiating change and by consequence typically plays a more reactive than proactive role - or any involvement is limited to the transactional level. There was a strong sense that HR should lobby for involvement at an early stage and at a strategic level to ensure the organisation can fully embrace the HR function's ability to influence and engage with leaders, managers and the employee body. Furthermore, whilst it is quite common for external consultants to be brought in to facilitate a change initiative there was a sense that this may not always be strictly necessary as in some organisations HR is perfectly placed to act in an internal consultancy role e.g. where they possess both the required technical expertise and are trusted by employees. Indeed this role can also exist in close collaboration with any external consultant who may be hired, with HR offering a vital 2-way feedback mechanism to communicate with the employee body and elicit their reactions to the change process.

There was strong appreciation from participants for the number of tools and frameworks which were introduced by the various experts to help ensure more effective HR involvement in the design of organisational change and to enable HR professionals to lead and support these change processes. There was also a strong message from Kate Gilmore that HR can do more to harness the adaptability of employees and to release the people power which exists in any organisation by focussing energies on 'liberating the talent' of its people. Furthermore, HR if involved at a strategic level has a better chance of encouraging managers to be future-led as opposed to memory-led: something she feels is essential for organisations given the pace of change in the external environment in which organisations exist.

The quotes below further illustrate some of the highlights and key points in the conference:

About the conference:

"My big take-away was realising that everyone was dealing with the same thing."

"I am now equipped with tools to understand the emotional mechanisms beyond change and will try to apply them myself and to others to support the process."

"I have learnt a great deal that I am sure will be very useful in my role as change agent."

"I feel a lot more confident now in my personal approach to change as well as in supporting management and colleagues."

About Peer Learning:

"Its strength is that it transforms problem solving away from agony aunt columns/bitching by the water cooler to something practical – it is the structure that allows this."

"The process forces you not to digress but to focus on the real issue."

"It's very powerful: I got an important insight today which is testament to the work of the group."

"Positive experience, pleasant process."

About change:

"Change is normal, it's what life is about: stability is a myth."

"Change is inevitable – we can't control it but we can control our reaction to it."

"Resistance will always happen – it's not an active thing but a human response which is necessary for consistency and to keep organisations as organisations."

“Everyone thinks of changing the world, but no one thinks of changing himself.”

“It is an anomaly to talk about change management: change is a slippery piece of soap.”

“It isn’t our business to know the destination but to leave the departure point.”

“We don’t exist to survive, we exist to change.”

“By virtue of [the sector] where we work we are the masters of adaptability.”

“As humanitarian organisations we are naturally evolving/changing, we therefore need to tap into this innate adaptability.”

Thanks to Our Donors

EPN is very grateful for the financial support and commitment of a number of agencies who provided funding for the conference. We would like to thank:

British Red Cross; CAFOD; ECB Project; The Management Centre; MSF UK; Oxfam GB; People In Aid; Save The Children UK; World Vision International and Action Contre la Faim.



EPN Conferences to Date

EPN 1 (DUBLIN – NOV '97)

Main theme was to increase knowledge for decision making, identify areas and mechanisms of collaboration, and to reach agreement on follow-up action. 39 participants attended from 33 different agencies.

EPN 2 (BRUSSELS – APR '98)

Main theme was to improve the ability of participating organisations, both individually and as a community, to find, select, prepare and retain personnel for emergency operations. 54 participants attended from 43 different agencies.

EPN 3 (NEW YORK – APR '00)

Main theme was “In Kosovo’s shadow” (reflecting more generally on the problems of mass mobilisations). 41 participants attended from 39 different agencies.

EPN 4 (COVENTRY – JUNE '02)

Main theme was “Finding and developing good field managers for relief assignments” with a secondary theme: “Ensuring the safety and security of field staff on relief missions”. 50 participants attended from 28 different agencies.

EPN 5 (EVIAN – JUNE '03)

Main theme was “Thinking ahead, acting now – proactive Human Resource planning for emergencies”. 51 participants attended from 35 different agencies.

EPN 6 (BARCELONA – JUNE '04)

Main theme was “Good HR management for nationally recruited staff – an under-utilised resource”. 56 participants attended from 38 different agencies.

EPN 7 (DEURNE – JUNE '05)

Main theme was “Management development for emergencies”. 59 participants attended from 47 different agencies.

EPN 8 (ARCHAMPS – JUNE '06)

Main theme was how to work together and share success through collaborative processes. 69 participants attended from 54 different agencies.

EPN NAIROBI – MARCH '07

Main theme was to address common staffing challenges in emergency relief in East Africa. 60 participants attended from 25 agencies.

EPN ROME – MAY '07

Main theme was to consider professionalism in the sector and the role of Human Resources. 63 participants attended from 51 agencies.

EPN BANGKOK – JUNE '07

The purpose of EPN's first Asia regional conference was strengthening emergency staffing capacity. EPN Bangkok provided an opportunity to share experiences across different kinds of emergencies and organisations, while highlighting local contexts and expertise. The conference was attended by 65 participants from 31 agencies.

EPN NAIROBI – MARCH '08

Main theme was how to better prepare and train managers in Staff Care, with the aim of recognising weaknesses and how to empower managers, through a simulation methodology. 40 participants from 22 organisations attended.

EPN ISTANBUL – MAY '08

The topic covered was cultural diversity. Participants heard and offered the theory and their personal and professional experiences, and debated the implications of cultural diversity on standard HR issues and practice. 55 participants from 42 organisations attended.

EPN NAIROBI – MARCH '09

Addressing the subject of facilitating successful change, EPN Nairobi offered case studies, plenary debate and the opportunity for participants to address issues of change affecting them at the time. 30 participants attended.

EPN Gatwick Statistics

Total number of people attending:	59
Total number of participants:	59
Number of guest speakers:	12
Number of agencies represented:	36

Agenda Summary

Wednesday 13 th May 2009				
Time	Topic			
9:30 – 11:00	Peer Learning briefing for group leaders			
10:00 – 11:00	Arrival and Registration			
11:00 – 11:05	Welcome			
11:05 – 11:30	Introduction and Mandate of EPN Gatwick; Icebreaker; Participant Expectations			
11:30 – 11:45	Initial Framing Concepts and Questions about Change in Organisations			
11:45 – 12:05	Insights from EPN Nairobi on Organisational Change			
12:05 – 12:30	Briefing to plenary re: Peer Learning Process			
12:30 – 13:30	Lunch			
13:30 – 15:00	Peer Learning session 1 & 2			
15:00 – 15:20	Break			
15:20 – 16:40	Peer Learning session 3 & 4			
16:40 – 17:00	Break			
17:00 – 17:45	Peer Learning session 5			
18:00 – 18:30	Plenary Reflection on the day			
19:15 – 20:00	Networking Reception			
19:00 onwards	Dinner			
20:30 – 21:30	Networking Reception (sponsored by The Management Centre)			
Thursday 14 th May 2009				
09:00 – 09:30	Introduction to the day: Feedback from Peer Learning groups			
09:30 – 11:00	Masterclass session 1			
	Influencing Change: The Power of Storytelling	Frameworks for Understanding Change	Back to Basics: The Foundations of Effective Organisational Learning	Breakthrough Change in Times of Crisis
11:00 – 11:30	Break			
11:30 – 13:00	Masterclass session 2			
13:00 – 14:30	Lunch			
14:00 – 16:30	Case Studies			
	Building Ownership of Change at CAFOD	Building Capacity for Surge at World Vision	The Pros & Cons of Complete Transparency: Change at Islamic Relief	The Challenges of Restructuring: Major Change at WWF Africa
16:30 – 17:00	Break			
17:00 – 18:00	Keynote Address & Questions 'Leading Through Turbulence'			
19:00 onwards	Dinner			
Friday 15 th May 2008				
09:00 – 09:05	Introduction to the day			
09:05 – 10:00	Dynamics of Change			
10:00 – 11:30	Panel & Discussion			
11:30 – 11:45	Coffee			
11:45 – 12:15	Personal & Group Action Planning			
12:15 – 12:50	Reflections from the Conference			
12:50 – 13:15	'EPN Going Forward'; EPN Online; Closing Remarks			
13:00 – 13:30	Lunch and Departure			

The full agenda is available in the briefing pack at www.epn.peopleinaid.org/files/gatwick/default.aspx.

Session Reports

Welcome and Introductions

Jonathan Potter – Executive Director, People In Aid

Jonathan opened the session by welcoming participants to the EPN Gatwick conference. He thanked the Steering Group for their expert guidance and input, the funders for their financial support and Katja Pesari for coordinating the event. He expressed thanks to all those who had flown in to attend the conference, in particular those for whom English was not their first language.

Jonathan reminded participants that EPN is a participant-led learning network. This fundamental concept underpins the conference agenda which seeks to allow participants to learn from the experience of others and to ensure this learning be of value to participants as individuals and also to their respective organisations.

The choice of topic for this year, 'facilitating change', was introduced as an area which featured heavily in last year's discussions and feedback. Jonathan handed over to Vicky Cosstick, Convenor/Facilitator, to tell participants a little about her background and to discuss the mandate of EPN Gatwick.

Introduction and Mandate of EPN Gatwick

Vicky Cosstick – EPN Convenor

Vicky introduced herself as an independent consultant and facilitator with 30 years' experience working in change, the last seven of which having been spent in the international NGO sector. As a form of icebreaker and to gain insight into participants' expectations of EPN Gatwick, Vicky asked people to share their biggest hopes and fears/concerns for the next few days of the conference, first of all with one other person and then in the large group:

Hopes:

- To squeeze a lot into a short time
- Networking
- To hear stories and to tell some
- To gain ideas and different ways of doing things
- To learn more about EPN network – how it works
- Applying ideas to practice
- To learn something to enable me to be more effective in organisational change i.e. 'aha' moments
- To move beyond strategy and gain different ideas about engaging people in change
- Managing change: to be able to plan in advance and have the tools necessary so there is less fire-fighting
- To better support people through change
- Evaluation and robust ideas about what does and does not work
- Success stories
- Clarify differences in words used (dictated by different cultural backgrounds) e.g. leadership; change; follow-up; respect
- To hear the stories of things that don't work – providing an open and trusting environment to allow us to share these (we often learn more from the less successful stories)
- To avoid tunnel-vision and navel-gazing i.e. experiences which enable you to see a situation in a fresh way
- To go away reassured by people's experiences of change – not disappointed.

Fears/Concerns:

- Peer learning is scary – is my story going to be good enough?
- Finding oneself stuck in a conversation with a technical expert/specialist and not being able to follow what they are saying

Initial Framing Concepts and Questions about Change in Organisations

Vicky Cosstick – EPN Convenor

Vicky explained that in her role as facilitator she would seek to guide the process towards the agreed outcomes and to make a 'safe place' for learning. She stressed just how different the format of the conference would be to previous EPNs with a process carefully constructed so as to allow the effective flow of ideas and experiences over the 3 days. Vicky's desired outcomes for participants were:

- That something will have changed for them personally
- That they will have a clearer idea of how to understand, facilitate and influence change in their organisation.

The conference process is built on the basic assumption that "we cannot change without learning and we cannot learn without changing" – an assumption which applies to us individually and to our organisations. Vicky acknowledged that we all learn differently and have our preferred learning styles (reading; personal reflection; being taught/trained by experts; semi-formal discussions; formal conversations; peer learning; formal presentations; networking and informal conversations; resources and tools; having fun) and has tried to build each of these into the conference agenda. She was also very keen to acknowledge that laughter is good, as illustrated by JP Lederach: "there is no scientific evidence that seriousness leads to greater growth, maturity or insight into the human condition than playfulness". Vicky urged participants to notice the conversations they were engaging in and which of these were helping them to see things differently.

A framework made up of 4 main approaches to dealing with change was introduced and Vicky explained that successful change initiatives in organisations need to address all four dimensions. Her hope was that the process and content of the conference would address all four approaches.

1. BEHAVIOURAL

Competencies
Skills training
Performance & reward
360 degree

2. COGNITIVE

Business planning
Restructuring
Project cycle management
Visions and objectives

3. PSYCHODYNAMIC

Addressing emotion
Counselling
Surfacing hidden issues
Treating people as adults

4. HUMANISTIC

Values
Organisational learning
Communication and consultation

The session concluded with Vicky informing participants that the Emergency Capacity Building Project¹ was interested in sponsoring a piece of research coming out of the conference and so asked everyone over the next few days to think about:

1. What kind of resources, support and tools (from within the sector or beyond) you have found helpful so far in understanding and supporting change management in the humanitarian sector
2. What potential gaps in resources, support and tools can you identify? Might these offer potential questions or areas for research into the subject of organisational change in the humanitarian sector?

She then left participants with the following questions to bear in mind as they went through the conference:

1. How do you personally feel and react to change in your organisation?
2. What is your role with regard to change in your organisation? And what would you like it to be?
3. Do you believe that change can be managed? In what ways?
4. What is your theory of change? How do you believe change actually happens?
5. What are the drivers for change in your organisation? Where does change come from?

¹ For more details visit www.ecbproject.org

Insights from EPN Nairobi on Organisational Change

Pamela Mokaya – Director HR and Administration, WWF East Africa

EPN Nairobi was held in March 2009 and was attended by 30 participants including line managers, HR practitioners and those working in operations within local and international NGOs based in Africa. Pamela deemed it to be a very interactive and successful conference which for the first time discussed the same topic as the European EPN, Organisational Change. Pamela summarised the discussions, which focussed on HR as change agents.

For the full Nairobi Conference Report please refer to: www.epn.peopleinaid.org/files/nairobi09/EPN-IAWG-NAIROBI-2009-Conference-Final-Report.pdf

Peer Learning Process

Vicky Cosstick – EPN Convenor

Peer learning is a powerful tool for sharing learning and building networks. At EPN Gatwick it was also used to surface real-time issues and questions around organisational change in the sector with the intention that going through this process would help participants become more effective change agents in their workplace. It is a very disciplined and structured facilitated exercise which has some similarities to action learning (but is not the same).

For full details of the Peer Learning process please refer to annex D, page 33.

Plenary Reflection on Peer Learning Process

Vicky Cosstick – EPN Convenor

Summary of key learning points about peer learning

- Peer Learning is a powerful tool for sharing learning and building networks
- “The strength of the process is that it transforms problem solving away from agony aunt columns/bitching by the water cooler to something practical – it is the structure that allows this”
- As a group becomes more experienced the role of the facilitator becomes unnecessary as they instead ‘self-facilitate’. However, it is important to remember that each part of the process has its role and whilst the structure can be relaxed it should not be lost.

Participants were asked to feedback to the whole group, sharing their experiences of and comments about the Peer Learning process. *These can be found in Annex E, page 35.*

A number of participants admitted to feeling a little anxious about embarking on the Peer Learning process - their main fears being centred on whether their story would be good enough or suit the process, how effectively they would be able to communicate their story in just 6 minutes and uncertainty about just how useful the process would be to them. Having gone through the exercise their reaction was considerably more positive with many citing it as a tiring but very interesting and useful tool which allowed peers to provide practical advice and invaluable insight into their problem in a safe and controlled environment. Many also commented on the atmosphere of trust it created – something that set the scene for the rest of the conference and encouraged wide sharing of ideas and experience. Some participants admitted how difficult they found it to both give and receive affirmation although one described this component as ‘liberating’ and stressed just how much they appreciated being ‘battered up’! Others found it hard not to be able to revisit their story or justify/explain their actions after the initial presentation but soon realised this was unnecessary and that the exercise was not going to necessarily offer any immediate solution. Instead the feedback they received could be taken away and digested/reflected upon in their own time i.e. the problem still remained theirs. Concerns about how the process would work were allayed as after the first ‘round’ it soon became apparent just how straight-forward it was and in a sense the groups almost began to self-facilitate (although they appreciated the importance of maintaining the structure which is so fundamental to the effectiveness of the process).

Feedback from Peer Learning Groups

Vicky Cosstick – EPN Convenor

Vicky led a session in which a member from each Peer Learning group presented the key issues/questions which arose from the exercise. The idea here was to identify common themes, and for participants and presenters to be continuously aware of these key issues as they moved through the rest of the conference.

For a full list of all the solutions/ issues/questions which were fed back, key insights into organisational dynamics, please refer to Annex F page 36.

Most groups commented on how challenging they found it to come up with just one key issue or question for each individual's presentation, although they did report that this became easier as they progressed through the process. There were a number of common themes which can be identified from the feedback received, perhaps most notably the issue of resistance and how to manage and pre-empt this along with other emotional responses which may or may not be anticipated. The important role of managers/leaders in any change process also featured heavily and linked to this, the potential negative implications of not gaining buy-in from all stakeholders. Timeframes and the planning involved in any change process was also a concern raised by more than one group, in particular the question of how to keep momentum in a change process whilst balancing long and short-term priorities for the organisation. A final common theme was the issue of how to evaluate and monitor outcomes of a change process.

It was also interesting to note just how few groups explicitly mentioned the role of HR in a change process. This may simply reflect the frustrations that were mentioned i.e. that HR are often not involved at the strategic level or fully engaged in a change process despite their potential to influence key personnel and the fundamental role they can play in supporting effective employee engagement throughout any change initiative.

The following pages provide insights into the topics and a summary of participant reaction to the Masterclasses and Case Studies delivered by experts and peers on Day Two. More detailed notes on what was said are separately available on the EPN website.

Masterclasses

Participants chose to attend two of four Masterclasses.

Influencing Change: The Power of Storytelling²

Tony Page – Independent Leadership Consultant & Philip Goodwin, British Council

Summary of key learning points

- Storytelling plays a crucial part in any change process, offering leaders the opportunity to distil experience, build understanding and create new possibilities for the future.
- By encouraging people to step back and ask themselves ‘what’s the story here?’ and engaging their higher faculties/intelligence, individuals will be better able to avoid stress in the change process and make more positive interventions.
- In change what is required is an integrated engagement of hands (action), heart (emotion) and mind (logic) which creates a new shared context that deepens and sustains the change in behaviour, instead of lapsing like so many on-off diets or exercise regimes. This involvement in the change process also moves people from being victims to become active co-creators of change.
- The 3 Circles of Doom, Control and Influence offer individuals a way to express and transform their private story from negative to positive and to rediscover their influence. By openly addressing the various issues contained within each circle when engaging a team member in change, the recovery effect will be achieved.
- *“This is a very powerful tool and I can see that I can use this”* Participant

The potential usefulness of storytelling in delivering change rests upon the opportunity it offers leaders to distil their experience, build understanding and create new possibilities for the future. By encouraging people to step back and ask themselves ‘what’s the story here?’ and engaging their higher faculties/intelligence, the premise is that individuals will be better able to avoid stress in the change process and thus make more positive interventions. Storytelling endeavours to move people from being victims in a change process to becoming active ‘co-creators’ of the change through an integrated engagement of hands (action), heart (emotion) and mind (logic). This creates a new shared context that deepens and sustains the change in behaviour, instead of lapsing like so many on-off diets or exercise regimes.

Participants arrived to find chairs, strewn with pieces of African fabric set up in circle, with a pretend campfire in the centre and African music playing in the background. After an introduction to the potential role of storytelling in a change process and some grounding concepts behind this, participants were given the opportunity to practice storytelling themselves. In groups, they were asked to prepare and tell a story which would influence and engage either upwards (e.g. to the Executive Director), sideways (e.g. to peers) or downwards (e.g. to subordinates). The intent was to turn hippos (solitary creatures with self-centred objectives) into gazelles (whose instinct is to move and work together).

Engagement with the process was greater from the more creative among the participants (i.e. those willing to get into character) who found the process to be an incredibly powerful tool. There was a general sense amongst those who attended that they found the session incredibly interesting, regretting insufficient time for the presenters to effectively convey the potential role of storytelling. Indeed a number of individuals said that they were keen to learn more and were looking forward to reading their copy of *‘From Hippos to Gazelles: how leaders create leaders’*³ (Philip Goodwin and Tony Page) which provides further detail on the potential role storytelling can play in a change initiative.

² For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

³ For further reading on the role of storytelling and a story of a real merger and change that was multi-national, multi-cultural and difficult (engaging hundreds of staff over 11 countries) please refer to *‘From Hippos to Gazelles: how leaders create leaders’* Philip Goodwin and Tony Page, British Council/Kingsham 2008 (available from www.h2gleadership.com) on which the session was based.

Frameworks for Understanding Change

Ian Vale – Senior Management Consultant & Colette Harvey – Management Consultant, The Management Centre

Summary of key learning points

- Often organisations use the wrong leadership/management approach to lead change
- There are five key elements which should feature in any change process: Vision; Competencies; Incentives; Resources; and an Action Plan
- Various models exist to help organisations consider the various roles which are typically involved in a change process e.g. Architect (designs process, shapes vision); Sponsor (signs off, provides weight); Agent (makes it happen, implements change); Participant (takes part i.e. is consulted/engaged); Regulator (sets the rules, creates the framework); and Anarchist (tries to subvert whatever happens, creates difficulties)
- Different individuals will have a different response to change and a different degree of resistance e.g. 'Champions' are enthusiastic about change whilst 'Challengers' are sceptical and ask difficult but often useful questions
- A successful Change Team requires 'Challengers', 'Converters' and 'Chasers'
- *"Sharp, focussed, crystal clear, succinct, relevant, engaging trainers – excellent!"* Participant

Ian and Colette introduced participants to a number of tools previously used with other NGOs which help analyse, communicate and lead change in a bid to ensure more effective HR involvement in the design of organisational change and to better enable HR professionals to lead and support organisational change processes themselves. Attendees were incredibly grateful for this insight and particularly receptive to the practical tools which they will be able to implement in the workplace.

A simple experiment at the start of the session helped to illustrate the various issues and emotional reactions so often at play in a change process e.g. implications of a lack of detail/direction or poor communication; fear of the unknown etc. This was complemented by a series of basic concepts around change, including the various change drivers which operate within organisations and types of change and approaches to lead/manage the change process. Participants appreciated being able to relate these change drivers and approaches to leading change directly back to their own experience, making the session all the more realistic and moreover relevant for them. Building on this, Ian and Colette provided participants with a checklist for any change process which organisations may use to assess their 'readiness for change'. They also included the justification for each element in the list – described by one participant as an "invaluable, fundamental tool for any organisation embarking on an organisational change project with useful arguments with which to win over senior management". There was also much value in the ensuing discussion about the various roles involved in change which provided a useful framework when designing a change process, helping participants identify the most critical roles and who could potentially fit into these roles.

Finally, and deemed very interesting by a couple of participants, the presenters proposed a model to illustrate the potential responses of different individuals to change. This related directly to one of the key issues raised on day one regarding anticipating and managing emotional responses to change and so was particularly well appreciated. Discussion around the model highlighted the key requirements of a change team with some surprised to hear that change champions are not always the best people to communicate to everyone in change and often the role of a challenger (those who ask difficult questions), convertor (those who are looking to be convinced) and chaser (those who reflect) are integral to a successful change team.

Back to Basics: The Foundations of Effective Organisational Learning⁴

Paul Whiffen – Knowledge Manager, HM Revenue and Customs

Summary of key learning points

- An organisation that is good at change proactively manages its knowledge as an organisational asset creating a learning organisation for continuous performance improvement
- The Learning Before, During and After model shows how a group or team can learn through structured and facilitated discussions at targeted points in project delivery
- The Learning Cycle illustrates the importance of identifying lessons learned from any activity and ensuring they are applied in the future. This can be done through the use of subject management experts who validate and distil the learning, determining best practice, which can be adopted into corporate standards and training for future projects
- The Knowledge Competency Framework helps an organisation identify which knowledge needs to be managed, so avoiding trying to manage everything and becoming activity led. It helps the organisation recognise which knowledge is strategic, competitive, core and non-core and how each should be managed in support of business delivery
- The 12-element model helps diagnose how well knowledge is flowing around an organisation. The model facilitates identification of where the organisation is learning and where there are gaps, so as to be able to close the gaps and ensure the effective flow of knowledge
- *“Provided very good basic frameworks”* Participant

Paul’s session focussed on 4 models illustrating the key principles which underpin effective Knowledge Management. To use his words “an organisation that is good at change is one that learns and manages its knowledge well”, therefore an understanding of these models can prove fundamental for anyone involved in an organisation’s change process. The session was carefully constructed so that each model built on the previous one, starting with two tactical models: Learning Before, During and After and The Learning Cycle before moving onto the more strategic Knowledge Competency Framework and 12 Element Model⁵.

The session was conceptual and the majority of participants were receptive to the ideas put forward, their reactions to each model being attributable to their respective experience, role, organisation etc. For some the Learn Before, During and After model provided sufficient food for thought as to how they could improve team/group learning within their organisations as it introduced some basic ideas about where and how an organisation can facilitate learning and own/manage the knowledge asset. Others were much more engaged with the strategic models which they felt would offer an invaluable framework with which to gauge their organisation’s current status and identify steps to better enable the flow of knowledge throughout their organisation.

More than one participant suggested that such a session should be delivered to their senior management team, in part to reinforce the key theme of HR’s sometimes limited involvement at a strategic level. There was a strong sense of appreciation of the models and presentation which participants deemed both useful and interesting – they also valued the useful reminder as to just how important it is for organisations to effectively retain knowledge that is all too often lost or archived and forgotten about.

⁴ For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

⁵ All models are based on Milton, Nick (2005) *‘Knowledge Management for Teams and Projects’* Chandos Publishing

Breakthrough Change in Times of Crisis⁶

Ben Ramalingam – Head of Research and Development, ALNAP & Paul Clarke – Director, Oxford Change Management

Summary of key learning points

- Aid agencies need to have an external orientation and be adaptive in the face of change as they encounter increasing and increasingly interconnected global challenges e.g. climate change, demographic change
- 70% of typical organisational responses to current and emerging contexts fail e.g. downsizing; restructuring; revision of business processes
- Resistance will always happen – it is not an active thing but a natural human response which is necessary for consistency and to keep organisations as organisations
- Successful projects can act to decrease resistance to change by decreasing *unnecessary* uncertainty and increasing individual motivation to change behaviour
- Successful projects also: have a clear necessity/business case; have a clear and compelling vision; leadership support; are led by multi-stakeholder teams with clear roles; have a clear, timed, flexible action plan *with 'quick wins'*; provide recognition / reward for changed behaviour; engage key stakeholders from the outset; and communicate effectively
- *"A stimulating presentation and stimulating ideas"* Participant

Ben and Paul provided the opportunity for participants to explore some of the options for change that are open to humanitarian organisations which are hoping to maintain and improve their effectiveness in the challenging and ever-changing external environment.

They first set the context for these change decisions which arise in response to the various challenges humanitarian organisations are currently facing and will be faced with in the future (e.g. changing demographics; increasing urbanisation; implications of climate change and the economic crisis; water scarcity etc). They also emphasised how inextricably linked many of the factors which make up these challenges are, making the task all the more complex. Participants were then encouraged to reflect on their own organisation's readiness to deal with such challenges in terms of any measures currently in place or those which they think should be. Reporting back to the group it became evident that there are a wide variety of measures in place which endeavour to deal with these challenges in the changing external environment but also that there is a strong sense that more should and could be done, in particular in terms of climate change and its impact on communicable diseases, water availability etc. Forcing individuals to think critically about their own organisation's actions and to share these with the rest of the group was a powerful exercise described as 'stimulating' and/or 'incredibly relevant and timely'.

Discussion about the typical organisational responses/changes in a bid to tackle such challenges and the suggestion that 70% of these activities fail was described as a further thought-provoking and eye-opening exercise. The introduction of key elements the presenters believe that successful change projects should include was particularly well-received, offering a useful reference for those undertaking a change process. This was complemented by a short paired exercise in which participants were asked to consider a recent change initiative they had been involved with and to rate how well they had implemented the various key elements within this initiative. Again, participants reacted positively to the opportunity to keep the learning relevant to their experience and very much appreciated the practical framework which they will be able to take back with them to their workplace to better facilitate future change initiatives in their own organisations.

⁶ For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

Case Studies

Participants chose to join one of four Case Study sessions.

Building Ownership of Change at CAFOD⁷

Barbara Wilson – Director for Organisational Development and Personnel, CAFOD

Summary of key learning points

- HR plays a key role in supporting an organisational change process
- A staff attitude survey can offer valuable insight into employees' experience of and feelings about a change process
- Major change takes a lot of time and effort and should be viewed in the long term
- Support from senior leadership is critical
- Efforts should be made to ensure employees are engaged throughout the change process for which communication is key

Following a period of considerable growth in recent years CAFOD has undergone significant changes in a bid to improve the effectiveness and focus of its humanitarian programmes. Barbara's session focussed predominantly on the implications such change has had predominantly on the HR department as it strives to 'catch up' with the changes that have been occurring across the organisation.

Barbara started the session by providing participants with a little background to the organisation, setting the context for the rest of the presentation and enabling participants to seek out any key similarities or differences to their own organisations and experience (many of which had witnessed similar growth over recent years). Attention then turned to the role of HR in response to these changes which included a review of HR policies; a new HR system; and development of HR strategy. These activities were undertaken in a bid to enable HR to better support managers in their leadership and strategic roles and essentially, to act as strategic partner within the organisation. Further to these measures, CAFOD also decided to apply for certification by the People In Aid Code of Good Practice and Barbara offered some useful insights into the benefits this can offer as well as some of the less positive aspects and difficulties in trying to achieve accreditation. This insight gave some participants the impetus to look into the Code themselves with a view to potentially seeking accreditation for their own organisations.

Barbara also talked about CAFOD's decision to undertake a staff attitude survey offering a thorough and helpful overview of how the survey was implemented and analysed and the action plan which emerged as a result of the findings. The survey response rate of 90% was impressive and in light of this, participants paid particular attention to how it was implemented and how they too may be able to improve their chances of a similarly positive response rate.

To conclude the session, six key 'lessons learned' were shared with participants which included the importance of patience, continuous engagement of staff, support from senior leadership and the fundamental role of communication throughout the process.

Some participants expressed surprise that HR did not appear to be more actively involved in the change process itself but appeared instead to be reacting in response to changes and there were also unanswered questions about precisely how HR can build ownership of the change process. Participants found it interesting to hear Barbara's first-hand account of how HR can be involved in a change initiative and perhaps moreover, the critical lessons learned from her experience which will help identify and hopefully minimise any difficulties they may face as change agents in their own organisations.

⁷ For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

Building Capacity for Surge at World Vision⁸

John West – Associate Director for Capacity Building, World Vision International

Summary of key learning points

- Training is not building capacity – capacity is the ability to achieve your objectives
- The core problem is not having skills but having the will and commitment
- The key elements to an effective capacity building strategy can be grouped as: Systemic (Structure / Systems / Tools / Resources), Competence (Knowledge / Abilities and Habits) and Esprit (Motivation / Attitudes and Values)

John's presentation focussed on World Vision's challenge to develop a sustainable indigenous solution to the problem of managing surge demands to emergencies in Africa, many of which are chronic. He shared the World Vision Africa Humanitarian and Emergency Affairs Office's strategy, implemented in 2000 to meet this challenge. The strategy to bring about change was designed to be comprehensive and sustainable: comprehensive in that the disaster management and risk reduction capacity has a 2-way flow between World Vision's operational communities, community development teams, national, regional and global teams; and sustainable in that the capacity and responsibility is owned, resourced and operated at all levels.

Following an introduction to the challenge and strategy, John talked participants through the capacity building framework and process used by World Vision, providing them with his first-hand account of the challenges and successes of these and what the organisation may do differently in the future in light of their experience. His presentation was supported by a number of useful models, including one which illustrated the responsibilities and activities of various teams at a national, regional and global level and how these inter-relate with one another – a model which one participant commented clearly demonstrated the 'complexity of the task at hand' given the number of people affected by and involved in the process.

Participants were particularly appreciative of John's insight into the key elements for an effective capacity building strategy (grouped as Systemic, Competence and Esprit) and detailed breakdown of what these mean in practice. John also provided practical advice deemed useful by participants on how to build capacity which participants will be able to take with them back to the workplace.

⁸ For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

The Pros & Cons of Complete Transparency: Change at Islamic Relief Worldwide⁹

Willem van Eekelen – Head of Policy and Research, Islamic Relief Worldwide

Summary of key learning points

- A transparent and consultative change process can be a very powerful change mechanism and enabler. It can ensure that changes are substantial and meaningful and have a wide and genuine buy-in amongst colleagues
- In addition to basic requirements such as an intranet, teleconferencing facility etc. a truly transparent and consultative change process also requires 4 other key components: A willingness, from the trustees and the CEO, to be explicit about any boundary conditions there may be and to be ready to discard any hidden agendas; a Change Team that has the energy to live up to constant scrutiny; an elaborate feedback network that spans each part of the organisation to be able to pick up anxiety as soon as it appears; and the senior decision-makers' willingness to take very substantial risks.
- A transparent and consultative change process is an exhausting, intensely time-consuming exercise
- Transparency in a change process has a long-lasting effect. Once people are used to it, it gets to be expected

To use Willem's own words, "in a best case scenario, a transparent and consultative approach is of great value to a change process. In a worst case scenario, it merely aggravates anxiety." Based on the realities of the 2008–2009 change process at Islamic Relief Worldwide, Willem offered participants a detailed account of his experience leading a change team in a truly transparent and consultative process.

He began by setting the context for the change project, describing how it arose in response to rapid growth which had changed the organisation and how it was heavily influenced by the results of a staff survey which revealed that there was little confidence amongst employees in how fairly decisions were made, and that a lack of transparency regarding decision-making processes was at the root of this. Willem continued with a detailed look at the method used to recruit the change team to ensure it stood up to scrutiny – an exercise which participants may not otherwise have realised the importance of doing in a truly transparent fashion. He then described the initial activities which led to the development of a comprehensive change plan, all clearly demonstrating the vast amount of time, effort and work that went into these initial stages.

Willem's presentation went on to explore some of the requirements, risks and limitations related to complete transparency and genuine consultation. Of all the requirements he mentioned, perhaps the most notable was the willingness of senior decision-makers to take very substantial risks – both event-based and those related to rapid cultural change. For example, an uncensored staff survey was implemented to gauge attitudes towards the change process whilst it was still ongoing – fortunately the positive results from this acted as a morale boost but it could easily have led to cynicism had the results been opposite. Willem emphasised one of the particular challenges he faced as being that of engaging with colleagues who were not in the habit of holding open discussions or working with an open communication style and approach. Furthermore, senior colleagues who were used to working strictly within a hierarchical decision-making structure found it incredibly difficult to accept the process which sought to judge arguments on their validity and importance not their source; and were also faced with the new challenge of having to publicly justify their decisions. These were just some of the many challenges and limitations faced by Willem and his change team and it was refreshing to hear such an incredibly honest and often frank account of what was entailed – all of which emphasised just how time-consuming and exhausting the project was for those directly involved in and/or leading the process. Participants also appreciated the level of detail that was shared with them which enabled them to fully appreciate the complexities and implications involved.

Although he had no visual aids, Willem's clear passion for the subject and his unique and engaging communication style kept participants' attention for the full length of the session.

⁹ For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

The Challenges of Restructuring: Major Change in WWF – Eastern Africa Regional Programme Office (EARPO)¹⁰

Pamela Mokaya – Director: HR and Administration, WWF East Africa

Summary of key learning points

- A compelling change story is fundamental to an effective change process
- Change Team members should be selected objectively
- Clear terms of reference for the members of the Change Team are essential
- A communication strategy needs to be developed and those who will lead the communication must be identified
- A change process must be open and transparent to avoid unnecessary gossip

WWF is currently undergoing a major restructure which includes the merging of two major regions: the Eastern Africa Regional Programme Office (EARPO) and the Southern Africa Regional Programme Office (SARPO) to form a super hub to be known as Eastern and Southern Africa Regional Programme Office (ESARPO) – the headquarters for which will be based in Nairobi.

Pamela is one of the seven change agents at WWF tasked with facilitating the process from its start in November 2008 to its proposed completion in July 2009 and so was perfectly placed to talk participants through the various complexities and challenges involved. After a brief overview of WWF, Pamela offered a little background into the decision to restructure which came from WWF Headquarters in Switzerland and reflected a desire to rationalise the organisation and enable it to become more efficient with its resources. The idea was mooted by Headquarters, sold to the change team and in turn sold on to staff and partners of WWF by the change champions who comprised this team. Pamela offered an incredibly honest account of the challenge of selling the change when at first she feared for the future of her own position – something which once again brought home the difficulties of managing emotional response in a change initiative.

She went on to describe the next stage of the project which involved a review of a number of Programme Offices, looking first at the scope of work involved in each office and then the key recommendations which arose from this which included the need to develop institutional vision; to strengthen strategic planning and programme standards; to strengthen and streamline network support to Programme Offices and to foster a learning and sharing culture. A further issue revealed by the review which struck a chord with the HR practitioners in the audience was that at WWF a number of scientists were in management positions and somewhat naturally, these individuals are often more concerned with the wildlife around them than with the people they manage. This illustrated a clear need to improve people management capacity and instigated a complete review of the role of managers.

Participants particularly appreciated the description of how the Change Team was selected: an initial Terms of Reference was developed and then the various Change Champions were selected on the basis of their technical competencies in different areas i.e. finance, HR, conservation. Each individual had to be conversant with different aspects in different areas i.e. for finance, the financial impact on the change process and what the rationalisation would portend for the organisation; in the case of HR, what the legal implications were e.g. in the case of redundancies what the best course of action was; and for the conservationist, what change will mean for conservation delivery. Whilst it may seem common sense to have a team which includes such a multitude of expertise, more than one participant admitted that this was something overlooked in their experience as the drive for change and change project was all too often left to those who simply had the time or the inclination to move the project forward, rather than those who were best placed or skilled for the job.

Finally, Pamela shared some key recommendations when undertaking a change initiative, including the importance of a compelling change story; the need to develop a communication strategy and identify who will lead this communication and the need to be open and transparent to avoid unnecessary gossip. Once again, participants were highly appreciative of this insight which they would use to improve the effectiveness of any future change initiatives in which they themselves may be involved in their own organisations.

¹⁰For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

Keynote Address & Questions: 'Leading through Turbulence'

Kate Gilmore – Executive Deputy Secretary General, Amnesty International

Summary of key learning points

- The term 'change management' is redundant and implies that change is somehow abnormal. Organisations should instead focus their efforts on coaching for adaptation in an ever-changing world
- Adaptation is a daily process as we as individuals and organisations adapt to the external environment in which we exist
- Managers need to be future-led not memory-led to focus on the future and pace change against the external environment
- HR can do more to release the 'people power' which exists in any organisation by focussing energies on 'liberating talent' of its people
- 90% of organisations fail to execute and track strategy due to 4 key barriers: Vision; Leadership; Resource and People
- NGOs are currently facing a number of challenges related to accountability; leadership; talent; learning; adaptation and impact
- In the humanitarian sector collaboration is more important than competition (brand and niche are not the priority)
- To move forwards an organisation needs to be people-oriented; future-led; have a vision centred on the external world; have a clear direction; align the people it has today with the talent needed tomorrow
- *"We don't exist to survive, we exist to change"*

Since arriving in her position as Executive Deputy Secretary General at Amnesty International in 2000, Kate has been responsible for broad-ranging organisational change and enabling an overall strategic re-orientation of the organisation's work. She plays a leading role in the global communication of Amnesty International's vision and mission.

Change Management or Adaptation?

Picking up on one participant's metaphor of change being like a slippery bar of soap, Kate stated her belief that the concept of change management is somewhat redundant – in her view change management is beyond our reach in terms of its breadth, width and speed. The term also quite wrongly implies that change is somehow abnormal. She argued instead that efforts should be focussed on coaching for 'adaptation' in an ever-changing world: by creating adaptive communities of purpose (i.e. those which are 'true' to their purpose not their practice) a lot of what paralyses organisations in a changing world may shift. The discussion is therefore not so much about change, but about creating 'adaptive behaviours'.

Kate continued with a reminder that adaptation is a daily process: organisations and the individuals within them are naturally less inclined to go from one absolute norm through change to the next absolute norm but are actually continuously adapting to the external environment in which we exist. All organisations are constantly in the process of adapting, be they banks, governments or NGOs. Kate gave the example of organisations which are currently grappling with the question as to how their workforce is going to co-exist alongside potentially massive global change – "what does civil society look like in a world of 2°C change?"

Memory-led vs. Future-led

From her experience Kate feels that the problem in convincing certain managers to change or 'adapt' stems from their tendency to be solely 'memory-led' as opposed to 'future-led', a dangerously misleading force in her view. The key to unlocking the mechanism for change is to focus on the future and to pace change against the external environment. Kate strongly believes it is wrong for an adaptive strategy to be grounded on internal ideas and competing interests, instead insisting its mission drivers must be in the external world. For example, 96% of Amnesty International's membership is in places where the least violations of human rights occur and the demographic make-up of this membership (with the exception perhaps of women) is that which is least likely to experience human rights violations. If the organisation paced change to this internal

audience then it is likely that no effective change would actually occur. With this in mind, Kate also stressed the fundamental need to remind Amnesty colleagues undergoing change that it was originally formed by the external environment. Furthermore its job has always been and continues to be to bring the external world in, to adapt and not to preserve: no organisation exists to preserve what it has.

The Changing World

Kate went on to consider the effect of the speed at which information is now communicated around the world in organisations, contrasting the situation in the 1960s when a field visit to extract testimony would involve a 6–12 month process of corroboration, writing-up, publication, denouncement etc. with today, where CNN can be on the phone in a matter of seconds to ask for an official response to a particular photo that has been posted somewhere. In this sense change is now ‘forced upon us’ and adaptation is essential if we are to fulfil our duty to respond to the external world.

Kate’s address continued with a consideration of the shifting of power as the moral strength of the west is in severe decline with the ascendancy of countries such as China and India. She also talked of the world becoming more borderless and the changing construct of ‘niche’. Through all of this she asked “how are we as organisations adapting?” In her view, HR can do more to release the ‘people power’ which exists in any organisation. She urged those in HR to help organisations to move beyond administration, contracts and operational plans, none of which are tools of enablement, empowerment or adaptation, and to instead focus energies on ‘liberating talent’ of its people. Kate also feels strongly that the story for going forward requires NGOs to re-align their relationship to other actors.

Why Do Organisations Fail?

Based on the work of Kaplan and Norton¹¹ Kate briefly examined the reasons why 90% of organisations fail to execute and track strategy and stressed the role that HR can play in becoming a leader in adaptation.



Key Challenges

There are a number of challenges NGOs are currently facing which Kate summarised as follows:

- *Yesterday*: whilst it is important to have a narration about yesterday and it does have a value in shaping the organisation’s future, it needs to be put in its proper place to ensure any process is future- not memory-led
- *Accountability*: measures of what amounts to success and failure are very important within a change process
- *Leadership*: effective leaders must be future not memory-led

¹¹ Kaplan, RS and Norton, D P (1996) *The Balanced Scorecard: Translating Strategy into Action* Harvard Business School Press

- *Talent*: to be successful and move forwards organisations have to start realising and effectively managing the talent of their people: “if we thought of people’s talent as a resource like we think of finance as a resource we’d be doing civil society a great service”
- *Learning*: organisations have a lot less time to do much more learning and so it is important not only to invest in talent but to shape the employment contract so that colleagues understand that their job will be different tomorrow than it is today
- *Adaptation*: rather than managing change, organisations must focus on facilitating and embracing adaptation to the many changes in the environment in which they exist
- *Impact*: organisations need to ascertain whose voice counts and who is defining ‘success’

The Future of Niche

Kate returned to her assertion that NGOs needs to focus on a common vision to ensure the existence of ‘sustainable individuals in a sustainable society on a sustainable planet’. She feels that the sector has taken on the idea from the corporate sector that niche and brand are important and argued that in fact collaboration as opposed to competition is the way forward.

Moving Forwards

Any strategy moving forwards needs to be people-oriented and requires the following:

1. *Yesterday* to be put in its proper place
2. A *Vision* centred on the external world
3. A *Clear direction* – not necessarily a defined end-point: “it isn’t our business to know the destination but to leave the departure point”
4. *Our own mission 2020* which should be aligned, refreshed and re-told when people stall along the way
5. Alignment of the *People we have today* to the *Talent we need tomorrow*

Kate concluded her presentation by stressing the need for *courage* as opposed to power (often those with power are the worse at change). Taking courage and strength from external challenges and having courage of conviction is critical.

Dynamics of Change

Will Campbell – International Management Development Consultant, The Management Centre

Summary of key learning points

- There are 7 psycho-dynamics which individuals may expect to experience in a change process
- A group exercise which provides first-hand experience of these dynamics can be useful for any change team before embarking on a change process
- By anticipating certain reactions to change, strategies for managing these reactions can be put in place

Will led a large group exercise to illustrate the 7 dynamics one may expect to experience in a change process and to give each participant a first-hand experience of these. He recommended using such an exercise and the ensuing discussion with change teams.

The Exercise:

1. The group were told to get into pairs
2. Each pair was asked to stand up and spend one minute observing each other without talking
3. Participants were then instructed to turn away from their partner and change 5 things about their appearance
4. On turning back to face their partners each individual was asked to identify the 5 changes that had been made
5. Participants were then asked to turn away again and to change a *further* 10 things about their appearance
6. Turning back to face each other participants were again asked to identify the 10 different changes their partner had made

The 7 Dynamics (psycho-dynamics) of Change

Having completed the exercise participants regrouped to discuss their reactions in terms of the 7 dynamics of change and provided strategies of how to deal with these:

1. *People will feel awkward, ill-at-ease and self-conscious* – even when it is obvious that it is a pretty positive change
Strategy: Tell people to expect it
2. *People will think about what they have to give up* – however compelling the case for change
Strategy: Don't try to sell the benefits of the change effort initially. Legitimise the losses, and allow them to mourn
3. *People will feel alone even if everyone else is going through the change* i.e. they will feel that they are the only one going through a set of emotions “how will I cope, everyone else will be OK?”
Strategy: Structure activities that create involvement. Encourage them to share ideas and work together to help each other through the change.
4. *People can handle only so much change* – typically people will actually be able to change more than they think. They still have their limits but they are usually further than they think and what is important is to support them up to this limit.
Strategy: Set priorities, and go for the long run
5. *People are at different levels of readiness for change* – and individual's speed of response to change does not necessarily reflect whether or not they agree to the change or their degree of resistance
Strategy: Don't label or pick on people. Recognise that some people are risk-takers and others take longer to feel secure
6. *People will be concerned that they don't have enough resources (time, money, skills, etc.)* – this can sometimes be their perception and not necessarily a fact
Strategy: Encourage creative problem solving
7. *If you take the pressure off, people will revert back to old behaviour* – evidence suggests that change may take 5–7 years to embed
Strategy: Keep a focus on maintaining the change, and manage the journey

Panel and Discussion

Ian Vale – Senior Management Consultant, The Management Centre

Paul Clarke – Director, Oxford Change Management

John West – Associate Director for Capacity Building, World Vision

Barbara Wilson – Director for Organisational Development and Personnel, CAFOD

Pamela Mokaya – Director: HR and Administration, WWF East Africa

Facilitated by Vicky Cosstick – EPN Convenor

A series of questions were put to the panel of experts by participants and the ensuing discussions revealed the following key messages:

1. External consultants are often used by organisations in change initiatives and the experts agreed that this external authority can be useful in that it brings a different perspective; can give the process objectivity and through this legitimacy; and can play an integral role in holding internal representatives to account. However, the panel were also keen to stress that fundamental to the success of any change process is internal leadership and motivation in the form of 'change agents' or 'sponsors of change' within the organisation. These individuals should work closely with any external consultant who is brought into the organisation, a relationship which is particularly important where employees may feel resentment towards the consultant who they believe may simply be prolonging the process so as to keep their job. It was also acknowledged that external consultants are not always necessary if the expertise is available in-house e.g. HR may be able to act in an internal consultancy role where they possess the required technical know-how and are trusted by employees.
2. In a bid to overcome resistance to change it is essential to adopt a tailored approach to communicating the benefits and outcomes of the change to different stakeholders. One panel member also pointed out the often overlooked fact that by default any change process tends to focus on change but that this can in effect be self-defeating i.e. we tend to ignore the 95% of things that stay the same. By contextualising any change and assuring individuals that the organisation's essential values etc remain the same, a lot of resistance may in fact disappear and instead the organisation can successfully harness people's resilience, toughness and dedication.
3. The panel identified a number of key flags which can indicate that things are going wrong within a change process. These included not keeping to timeframes; missing 'key deliverable's which may indicate change fatigue or obstacles to the process; and activities being shelved which implies that they have not been sold/marketed well and so are not bought into.
4. Each expert offered their key ingredient which would make for a more effective change effort:
 - Communication
 - Plan as much as you can
 - Ensure people have 'the will'
 - Organisations aren't machines – intervene as you would in society
 - Leadership – not power or control but responsibility through enabling
5. There are a number of key elements related to the unique nature of the humanitarian sector/emergency relief organisations which organisations should embrace to help ensure effective change management. These include a) the fact that people really want to do the work therefore as long as any change is linked to a clear purpose resistance should be minimal; b) the strength, conviction and core values held by employees which helps to keep them engaged in any change process; c) that by virtue of where organisations work humanitarian professionals are the masters of adaptability – change is somewhat natural to them.
6. Whilst we may not be able to manage change we can catalyse it by asking the right questions and then provided the framework to capture the reactions we get.

Personal and Group Action Planning

Vicky Cosstick – EPN Convenor & Rachel Houghton – Sector Partnerships Project Manager, Emergency Capacity Building Project

Rachel provided a useful overview of the background and purpose of the ECB Project and an update of where the project is at present.¹²

Rachel then explained the ECB Project was interested in conducting a piece of work on behalf of EPN members in order to better understand and foster the change process in our organisations.

Vicky asked each participant to take just 3 minutes to reflect on all that they had seen, heard and learned in the past few days and in their experiences before the conference, and individually to consider:

1. What gaps there are in terms of current resources which could potentially help support the change process within the humanitarian sector
2. What this 'resource' might look like i.e. a tool; research study; piece of action research.

Each individual was then asked to find someone else in the room with whom to discuss their idea and to negotiate with their partner to produce just one idea. After 3 minutes, the pairs were then told to find another pair and negotiate once again to produce an idea which the ECB Project could potentially support. The various ideas were then shared with the rest of the participants (NB: most groups struggled to come up with just one idea):

1. Common vision for change
2. Business case for staff well-being
3. Toolkit for dealing with emotions in change
4. Research: How to be collaborative without having an identity crisis
5. How to recognise, harness and develop capacity to actively adapt and improve
6. Tools to promote *adaptive* culture/behaviours
7. Action research – what do we learn from field participation about effective organisational 'engagement': who, when and how much?
8. Tool: Review (mapping) mindsets so that people have the right attitude towards change
9. Ten top tips and ten transformational tools
10. Toolkit for managers on change – stories of change highlighting: successes; learning; disappointments; emotional responses; cross cultural reactions and how to manage them
11. Teams: Team recruitment, development, performance etc; tools: mechanisms, piloting/testing, performance liberating (use ECB1 into ECB2)
12. Instilling in people the emotional intelligence and creativity so that they 'change' or understand change. Identifying EI in order to choose your change agents and collaborators. A competency solution
13. Making people aware that there is so much 'change' in everyday work life (a 1-1 with manager, looking at a monthly management account) that the word change should not be used or would not be threatening when a 'big project' comes up. This could be illustrated by case studies of change at *all* levels
14. Action learning sets
15. Talk about 'improvement' and not 'change' because it is familiar and mission-related
16. Talk about 'harnessing' people's creativity, EI etc. and not talking of projects, management etc.

Members of the ECB Project will discuss these suggestions with People In Aid and will also review what already exists in the sector before deciding which piece of work to take on. Once a decision has been made EPN participants will be notified.

Participants were then asked to take a couple of minutes to write down what they as an individual were going to do or take away from EPN Gatwick and to share their thoughts with the group:

¹² See www.ecbproject.org for more details

- Freshness and energy
- Build awareness at board level of need to underline the *purpose* elements in development and communication of strategy
- Challenge of transparency in an adaptation process
- Take account of the changes which will always be going on inside our members and ensure that where relevant, our services and interventions can support different levels, different processes
- I will be looking to use and implement some of the tools provided on understanding change, in particular what you need in place for a change to be successful
- For bigger organisational change: it is very important to prepare – to plan how to plan
- More time in building the case for change
- Mid-course corrections
- Bear in mind when building capacity that in addition to addressing competence (knowledge and skills), you also need to address systemic issues of structure, systems, tools and resources, as well as issues related to motivation, attitudes and values
- Implementing at least one 'change toolbox'
- The concept that we are always adapting and have been and will have to otherwise we will not survive (and some practical tools to do this and manage change)
- Assessing our readiness for a change in a more structured way...using vision, competencies, incentives, resources, action planning approach
- Peer Learning process
- Change exercise from Friday with Will Campbell
- HR can play a role in supporting an organisation's adaptation to change as well as individuals
- Peer Learning approach
- Now equipped with tools to understand the emotional mechanisms beyond change (7 dynamics of change, framework for understanding change), will try to apply them to myself and others to support the process
- Push for earlier HR involvement in change processes initiated by other departments/teams
- Change takes patience; change takes engagement; real change won't happen unless you win hearts and minds
- Find/devise activities to promote adaptability and awareness of the need to change
- No organisational change without individual change – keep in mind all changes are interconnected
- Storytelling
- Strengthening 'future leading' more than 'memory leading'
- I will try to 'sell' my change better. More work in planning and also in the *message* to transmit. Positive way, do not forget the benefits behind it
- Share knowledge and inspirations with colleagues and peers
- Develop storytelling skills
- Challenge within organisation to move from yesterday to the present
- Courage! Conversation vs. consultation? Compare or Kaizen
- The issue of Peer Learning assessment/Review to be incorporated in our Learning Events
- Learning Process/System to be expanded from lessons learnt to adaptation/adoption
- Change process to be used in all practical functions
- Integrate the idea of *adaptability* into the Management Centre's Change Toolbox
- The involvement of all the stakeholders on board before and during the change process
- Adaptability vs. change: need to harness adaptability not always focus on large change processes
- 'Are we good at something that no longer needs to be done?'
- Review how we measure *impact*
- Use Peer Learning with inter-divisional HR teams to promote inter-divisional learning on change management and other key issues
- Use tools to plan approach to change and prepare for implementation
- Internal change and adapting

- Over-estimate the personal element to any change process. Ensure there are many different approaches which take into account how people will be feeling and how to get them on board
- Use more practical tools when facilitating change or preparing for it e.g. change readiness score and types of change (Kaizer/Horshin)
- Peer Learning process as a tool
- Better understand the need to pay attention to the emotional well-being of people through a change process
- Buy-in; Peer Learning; Consultation; Don't rush
- Think about the balance between:

Strategy	_____	Tactic
External	_____	Internal
Being	_____	Doing
Social	_____	Individual
Change	_____	Behaviour
Process	_____	Tool
Conversation	_____	Action

Reflections from the Conference

Paula Gay – Personnel Manager, British Red Cross

Paula led a session on reflections from the conference by giving an example of change which illustrated how she had learnt to accept a change process and why this had been a successful conference as a result: As a member of the EPN Steering Group Paula was heavily involved in deciding the theme of this year's EPN and was very proud of the topic when it was first chosen back in November 2008. However, when Vicky Cosstick joined the Steering Group and informed that a) there would be no tables at the conference but instead participants would sit in a horseshoe; b) there would be no big panel discussions; and c) that the first day would be spent taking part in a 'Peer Learning' process, in which participants would be divided into small groups and have just 6 minutes to share a workplace problem, AND that as a Steering Group member Paula would be facilitating one of these groups, she started questioning whether change was actually a good thing! After thinking it over and realising the irony of wanting Vicky to facilitate an EPN conference on change but not wanting to change the EPN conference Paula decided to instead embrace the change. Having taken part in what she now feels was an incredibly successful conference she is happy that she was brave enough to embark on the journey of change.

Paula also asked two participants to reflect and share their experience of the conference:

1. *Liz Crawford – Field HR Coordinator, MSF UK*

Liz found and truly appreciated the 'incredible openness' throughout the conference and the relaxed, friendly atmosphere. Whilst she did not come with any huge expectations she loved the Peer Learning session and enjoyed getting to know a small group of people well. She also feels this session set the tone for the rest of the conference.

The storytelling Masterclass went down very well with Liz who liked being able to use her creativity. She now feels that when she is dealing with messy problems and big challenges she will not be quite as overwhelmed as she is equipped with tools to help her deal with these.

Liz felt that the group had been challenged on various concepts and fears about change and will take away the idea of 'adaptation' along with lots of other concrete ideas to put into practice.

2. *Mohammed Radzi Jamaludin – Head of HR and Volunteer Management, MERCY Malaysia*

Radzi described the conference as a very humbling experience and valued the opportunity to share, learn, challenge and affirm. He felt it was a privilege to be amongst so many HR practitioners and feels EPN is an incredibly useful tool. He is already looking forward to the next EPN!

'EPN Going Forward'

Jonathan Potter – Executive Director, People In Aid

Jonathan concluded the conference by reminding participants that this is not where EPN ends but that they can continue all the conversations they have started via EPN Online. He asked everyone to ensure they had completed their evaluation forms then thanked the Steering Group, all the speakers, Katja and of course Vicky Cosstick for all their time and effort.

Resources/References

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- Wheatley, Margaret J. (2006) *Leadership and the New Science: Discovering Order in a Chaotic World* Berrett-Koehler 3rd edition

Web Resources

www.acevo.org.uk

Creating change: Chief Executives on strategic planning captures chief executives' experiences, both good and bad, of leading strategic planning processes. Its intention is to serve as a useful introduction for chief executives, new or relatively new, to the process. The report is based on input from ACEVO members and other experts. Price: £15. Publication Date: 28.11.08

www.barefootguide.org

A free and practical, do-it-yourself guide for leaders and facilitators wanting to help organisations to function and to develop in more healthy, human and effective ways.

www.businessballs.com/changemanagement.htm

A simple guide to basic concepts and ideas.

www.cipd.co.uk/podcasts/articles/article3.htm?link=title

A free podcast from CIPD on managing change.

www.ecbproject.org

Emergency Capacity Building Project.

www.humanitarianfutures.org

Humanitarian Futures Programme.

www.managementcentre.co.uk

The Management Centre – various public access resources on organisational change.

www.peopleinaid.org/pool/files/publications/change-resources-gilliland-jud.pdf

A paper entitled 'How do you Introduce an Organisational Change?' By Bob Jud

EPN Online has, since the conference, continued to discuss many of the themes mentioned within EPN Gatwick and offers more resources to share. Join EPN Online on www.epn.peopleinaid.org or look at some recent threads on <http://www.epn.peopleinaid.org/messages.aspx>.

Annex A – Feedback and Evaluation¹³

37 evaluation forms were completed and submitted.

Overall Comments	1 = strongly disagree; 5 = strongly agree				
	%				
	1	2	3	4	5
The subject matter was adequately covered	-	-	5.6	50.0	44.4
The content was suitable for my background & experience	-	2.7	13.5	45.9	37.8
The mix of participants was good	-	-	10.8	51.4	37.8
The number of participants was good	-	-	-	62.2	37.8
The programme was well-paced	-	-	5.4	62.2	32.4
The briefing materials were helpful	-	-	27.8	41.7	30.6
The invitation information was effective	-	-	16.2	48.6	35.1
The facilitation was effective	-	-	5.4	51.4	43.2
The conference has been of significant help to me	-	-	18.9	51.4	29.7
The networking opportunity provided was effective	-	-	8.1	48.6	43.2
The location was appropriate	-	-	33.3	41.7	25.0
The accommodation was comfortable	-	5.6	27.8	52.8	13.9
The conference facilities were appropriate	-	5.4	18.9	59.5	16.2
Overall rating of conference	-	-	8.3	58.3	33.3

Participants were very positive about a) their feelings about the conference, b) the differences it would make to their work and c) the choice of topic and subjects covered was positive. Most negative comments were restricted to the venue services, particularly the unreliable internet connection and quality of the food (although this notably improved after the first meal). The value added of the panel session was less than had been hoped.

Opinions regarding the relevance and usefulness of the different Masterclasses and Case Studies varied according to the individuals' needs which in turn can be attributed to their specific role, experience, and organisation and also their personal areas of interest and expertise. The Peer Learning exercise was particularly well-received by participants who cited it as 'a good icebreaker'; an exercise which 'created trust'; and 'definitely something we will use in the workplace'. There was similar appreciation for Kate Gilmore's keynote address which was described as 'inspirational' by more than one participant.

¹³ For a more detailed evaluation of EPN Gatwick please refer to:
<http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

Annex B – List of Participants

First name	Surname	Agency	Title	Email
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Annex C – The 2009 EPN Steering Group

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The EPN Steering Group, on behalf of participants, would like to extend an enormous thank you to Vicky Cosstick and Katja Pesari whose professionalism made the event another in the series of successful EPN conferences. We would also like to thank those organisations which provided financial support for the conference (listed on page 4) and Catherine Elliott for writing this report.

The 2009 EPN Support Team

Name	Role	Contact details
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Annex D – The Peer Learning Process

Role of Participants

In advance of the conference participants were given guidelines on the Peer Learning process explaining its purpose and the preparation required by them. They were told they would be assigned to a **Peer Learning group** i.e. a small group of people in similar positions from different organisations, for the first day. The group would be facilitated by a member of the EPN Steering Group who had themselves been through the Peer Learning process.

They were asked to 'lightly prepare' a story which they would present orally to their Peer Learning group. The story should last around 6 minutes and relate to an experience they had of facilitating some kind of change process in their organisation. The issue chosen should be one over which the individual has (or had) some control over the outcome. It could be live or from the past, but needed to be about something which still had unresolved elements or held questions for the individual, and of course should be something they were willing to share with confidentiality with a small group. Ultimately they would emerge from the exercise with deeper insights and practical approaches to apply to their experience.

As participants would have no more than 6 minutes to present their experience, they were urged to keep it simple and clear enough so that everyone could register the key features of the situation without having to refer to handouts or charts. It was suggested that they begin their story by saying what the precise issue or question was as this helps people with the way they listen.

Participants were also given the following questions as potentially useful pointers to help guide them through their story (although it was stressed that this should not be regarded as a template for their presentation):

- *Describe the experience or situation you wish to share with the group, and perhaps some of the context or background. In one sentence, what is the question or challenge you are offering to the group?*
- *What was your intention when you started?*
- *Who else was involved (you may want to change the names)?*
- *What actually happened?*
- *How did you feel about the outcomes of what happened?*
- *Why do you think things happened the way they did?*
- *What have you learned from the experience so far?*
- *What are the questions that are still live for you?*

Role of the Facilitator

Members of the EPN Steering Group took on the role of facilitator for the various groups of participants. The Steering Group had been through the process a number of times themselves as preparation for the role. Facilitators were provided with the following guidelines:

1. The critical role of the facilitator in this exercise is to **follow the process**. It is the process which 'contains' the group dynamic, i.e. makes it safe. Actually the primary consideration is that participants find the process helpful, so there may be times when the facilitator puts the needs of a group member above the demands of the process, although the group will always come back to the process.
2. The facilitator's role is to **moderate the process and model good questions**. As the sessions progress and the groups get the point, this need will diminish – let the group take over as far as possible.

The Process

Before starting, the facilitator:

- Put the process on a flipchart sheet.
- Negotiated confidentiality with the group i.e. issues can be shared but individuals, specific stories and organisations cannot be named outside the group.
- Ran through the process and asked for specific concerns but explaining that the process needed to be experienced in order to be fully understood.

- Explained that they would be monitoring the process quite strictly and may interrupt (people should not take this personally).
- Explained the key point that group members never insert their own experience into the process. They can learn to cut themselves off – still making the point they want to make but ‘bracketing’ their own story.
- Reminded the group that they should also not insert anything they happen to know about the person, scenario or organisation because of outside knowledge.
- Asked for someone to volunteer to time; this role should rotate around the group during the meeting (as the timer will not be able to participate properly).

The process took around 35 minutes per person, following the format below:

1. **Presentation of Story** (6 minutes) – without interruption
2. **Clarification** (6 minutes) – presenter responded to any questions from the group with factual clarifications, but not discussion or explanations.
3. **Affirmation** (6 minutes) – the group offered affirmations to the presenter who was instructed not to respond (no explanations, justifications or defence) but simply to take notes as much as what was said may not be registered at the time. Useful affirmations included:
 - I really like the way you ...*
 - I admire your courage in ...*
 - I think you're asking the right questions/doing the right thing when ...*
 - The image that comes to mind when you are speaking is ... (use of metaphors can be very helpful)*
 - I would share your concern about ...*
 - I noticed you said/used the phrase ...*
4. **Challenge** (6 minutes) – the group challenged the presenter who was instructed not to respond (no explanations, justifications or defence) but simply to take notes as much as what was said may not be registered at the time. Useful challenges included:
 - I wonder if it would be helpful to see it as*
 - The image that comes to mind is*
 - I noticed you said, mentioned*
 - I wonder how this looks from X's point of view.*
 - I wonder what's stopping you from ...*
 - Is it worth trying an experiment in ... ?*
5. **Response** (2 minutes) – the presenter described how they felt during the feedback and what was helpful (or unhelpful) about it. Again, no explanations, justifications or defence were permitted
6. **Key Issue/Questions** (3 minutes) – the group identified a key issue or question at the heart of the story. This was instructed to be a systemic issue to shift the discussion from the particulars of the individual's experience to the generic issues about organisational change and/or HR and/or the humanitarian sector. This was written on a flipchart as a statement and/or question that would later be fed back to the plenary conference.
7. **Process Check** (1 minute) – the group quickly discussed whether the process worked as it should. (This required less time as the sessions progressed & the group became familiar with the process.)

Annex E – Plenary Reflection on the Peer Learning Process

Participants were asked to feed back to the whole group, sharing their experiences of and comments about the Peer Learning process (the list below also includes observations made by the Report Writer).

- The strength of the process is that it transforms problem solving away from agony aunt columns/bitching in by the water cooler to something practical – it is the structure that allows this
- Often not shared the experience before so verbalising it has a significant impact on the individual presenting their story
- Many people were apprehensive about whether their story was going to be 'good enough' or suit the process
- First round people getting used to the idea...took a while to warm up
- Certain group members seemed more forthcoming than others at the start
- It was more fun than I thought
- A real privilege to learn about people's different experiences
- It was encouraging to hear that there were certain problems we all share
- It was exhausting: listening is tiring. Also, providing continuous feedback and consciously thinking of how best to work such feedback is tiring
- Interesting to share your reaction and not censoring this but instead putting trust in the person receiving it that they will decide whether or not your input is useful
- Liberating and pleasant to say nice things and to be 'battered up' in return
- Don't underestimate the effort of trying to explain the situation to a group i.e. tell your story
- Simply receiving affirmation is strange and not very easy!
- There's not one linear solution but instead the presenter has to process what they're hearing and identify potential solutions in their own mind
- The process forces you not to digress but to focus on the real issue
- Quite calming – gives time and space to reflect
- Opposite experience: found it hard to control the urge to respond to all that was said!
- By the time group got to the 4th/5th person they were tending to defend themselves and their actions in their initial presentation in a bid to pre-empt the challenges which may be voiced later
- I was pleasantly surprised by how polite you can be when feeding back. I hope to use this in the future
- I sometimes struggle to think in 'affirmation' terms
- I found it difficult to write whilst listening to the feedback my group was giving me
- At first I had a sense of discomfort at not being able to revisit and explore areas of my story and then I realised that there was no immediate resolution to the issues (which is a positive thing – how can you resolve such issues in just 30 minutes?) Instead I would take away my notes and reflect on them with a new motivation to do something with the information I had received
- The problem is still mine. The rest of the group gives their feedback and then moves on – they remain detached from the problem
- The process went a lot faster than I anticipated
- We read laughter or silence as a sign that the group needed to move onto the next stage
- The process was a lot more straightforward than I thought it would be at first. It in effect ran itself
- Over time, if you use the process a lot then the structure slightly disappears and the group naturally moves from one stage to the next without being prompted although interestingly, the natural tendency is to skip the affirmation section and move straight to the challenge segment
- As a group becomes more experienced the role of the facilitator becomes unnecessary as they instead 'self-facilitate'
- It is important to remember that each section has its role and whilst the structure can be relaxed it should not be lost.

One participant shared a problem-solving process used successfully by colleagues at World Vision which takes just 15 minutes:

1. An individual is given 3 minutes to describe a problem situation to a group
2. Each member of the group writes a question about the situation in no more than 12 words (the aim being to have a question with a sharp focus)
3. On the basis of what they hear in response to the questions, each group member gives one piece of advice which they write on a piece of paper
4. The individual goes away with the questions and the pieces of advice which it is hoped will give some new insights into their initial situation

Annex F – Feedback from Peer Learning Groups

Group 1 – Facilitated by Paula Gay

- The impact of time on commitment to change
- The impact of shifting boundaries in a change process
- Managing emotional response to change. How can a change agent contribute to managing an emotional response to change?
- Connection between leadership commitment and change – can make or break a process
- Differing realities lead to different expectations. How do you link them to get the same goal?
- Changes at work often involve a change in identity

Group 2 – Facilitated by Jonathan Potter

- It is important the leader chooses the style of leadership – which might need to change during a process – to achieve a desired outcome
- Expect a change process to be more complicated than you thought it was going to be; dare to say ‘no’
- Because of the high visibility of a change process, the way in which you run the process will have an impact on the future expectations of the level of engagement
- Need to take both gut level/emotion and evidence/facts into account when managing change in us and in stakeholders

Group 3 – Facilitated by Candice von Memerty

- How do we get line managers to take ownership of people management processes?
- How do we formalise systems in an evolving culture while maintaining consistency between local and global levels?
- Should we provoke change and who is we? Sensitivity to different cross cultural perspectives during change
- Embedding change in cultures and behaviours over the long term when short-term priorities take over
- How do you maintain impetus on a long-term strategy?
- How far do you go to have a consensus approach? Not expecting the ‘Christmas Turkeys’ (i.e. those which will leave when the initial change process is over) to lead the change

Group 4 – Facilitated by Catherine Russ

- How do you evaluate and prioritise actions that will maximise impact during change?
- Change processes need to factor in role definitions and boundaries between OD/HR and business-planning
- In a change process, how do you proactively prevent de-railing by senior management?
- How to maintain momentum and buy-in when the process takes longer and not everyone is on board?
- How do we influence when we do not have authority?
- How do we maintain resilience & perspective in the midst of pressures during change?

Group 5 – Facilitated by Lisa Bedelian

- How do you evaluate the change process and ensure you are reaffirming the causes of the change? Fine-tuning it and ability to test it before deciding outcome
- Pre-empt areas of resistance and have contingency plans before a change process. Ensure collaboration between all parties
- Ensure involvement of all stakeholders and be better prepared and have communication and collaboration very early on in process. Need to have support and authority behind you from start. Ensure clarification of roles (link in with communication)
- How do you ensure involvement and planning to have a successful change process? Efficiency vs. staff morale
- Standardisation vs. cultural fits and flexibility during change processes. One size does not fit all, recognising added value before implementation. Tolerance in model. Framework not directed

Group 6 – Facilitated by Rory Downham

- Change, however significant (small or large) is a way to reinforce organisational values and strategy
- In order to build ownership of change you need to demonstrate the added value
- Good induction into organisational values and culture provides a sound foundation for future change
- Different stakeholders require tailored data and evidence to make the case for change

- Need to develop skills and methods for dealing with complex change: different layers and stages simultaneously

Group 7 – Facilitated by Bev Irwin

- To intervene or not – that is the question? Based on compromise of values, culture, sense of HR being 'used'
- HR's influencing role for leaders to walk the talk in a change process
- How to get HR at the table for the strategic agenda, not just transactional
- Ownership/engagement of HR management at all levels

Group 8 – Facilitated by Katherine Galliano

- Change needs to be communicated to (clients and customers) and participated in by everyone at every level in the organisation and at every stage of the process
- Change brings resistance
- Don't forget yourself, as well as others' needs in a change process
- Buy-in from senior managers
- Consider the extent to which management information influences the change process
- After a period of substantial growth, how and when does an organisation learn to say 'no' or handover to others, whilst maintain integrity and reputation?
- Do we still need to grow?
- How to persuade stakeholders to embrace systems to ensure transparency and accountability