

THE CROWN ESTATE CHANGE MANAGEMENT HEALTH CHECK

About The Crown Estate

The Crown Estate has a property portfolio which encompasses many of the UK's cityscapes, ancient forests, farms, parkland, coastline and communities. The estate extending throughout Britain.

The Crown Estate portfolio has a value in excess of 4 billion pounds, and encompasses three properties sectors; urban, rural and marine, giving it a unique diversity. Whilst technically the land and assets are the Sovereign's property "in right of the Crown", the Crown Estate acts as trustee and makes all decisions regarding their management.

It carries out the roles of employer, influencer, manager, guardian, facilitator, and revenue creator, in order to run the estate both on commercial lines and also to focus on heritage and conservation issues. The organisation employs approximately 400 staff, at ten different locations throughout the United Kingdom. The two principal offices are in London, and outside the town of Windsor.

In November 2003 the Crown Estate started a programme of significant change to the business operation. The change focussed on 6 key areas: Investment Strategy; Targets; Asset Management; Customers; Corporate Social Responsibility and its Employer Role.

To deliver the necessary changes from the Change Programme, a series of 17 Change Projects were to be carried out over a 3 year period into 2006.

As well as moving the organisation's focus from property management to asset management, the changes also involved the restructuring of several departments, outsourcing of the property management functions, change of customer focus, and changes in organisational culture.

Initiation Of The Change Management Health Check

Halfway through the 3 year Change Programme the Crown Estate decided that it wanted an external consultancy to carry out a Change Management Health Check, in order to assess how effectively it was managing the changes. In order to capture the learning of what it had done well in managing those change projects that had already taken place, and what areas of change management needed to improve with recommendations and actions on how these areas could be improved. So that this learning, actions and recommendations could be used in the management of the remaining change projects within the programme.

John S Steel was chosen to carry out the Change Management Health Check.

Objectives Of The Change Management Health Check

The objectives of the Change Management Health Check that was carried out were:

To assess the effectiveness of the:

- Change Strategy, Plan and Planning
- Programme Management and Control

for the Change Programme and the 17 Change Projects

Included within the scope of the Change Management Health Check were those of the 17 separate change Projects that had already finished, and also those Change Projects that had yet to start.

Methods Used In Carrying Out The Change Management Health Check

Four different methods were used to collect the data to be used in the analysis of the way the changes in the Change Programme and the 17 individual Change Projects were managed, and also the methods used to programme and project manage them.

The four methods used were:

- A review of the documentation for the Change Programme and the individual Change Projects.
- Completion of an electronic, multi-choice Change Management Health Check Questionnaire by samples of people who occupied the roles of Change Sponsor; Change Agent; and People Impacted by the Change – 51 people in total.
- Interviewing a representative range of people from the Change Programme and the individual change projects who occupied the roles of Change Sponsor; Change Agent; and People Impacted by the Change, using a semi-structured interview approach – 35 people in total.
- Observation of a programme review meeting as it took place.

Included within the sample of people who were interviewed and completed the questionnaire, were people who had joined the organisation part way through the changes, as well as those people who had been present in the organisation before the start of and throughout the changes. In order to obtain a wide range of perceptions and views.

The Change Management And Project Management Areas That Were Covered During The Change Management Health Check

The following are examples of Change Management areas that were assessed during the Health Check.

People's understanding of the reasons for the changes; Management commitment at all levels; Analysis of what needed to change; Use of the organisation's change history; Clarity of the description of the desired, future state and people's understanding of it; Setting of change objectives; Benefit planning and management; The change strategy; Carrying out and understanding of the roles/responsibilities of the roles of Change Sponsor, Change Agent, and Stakeholders; Identification, assessment and management of concerns and resistance; Change communication strategy and plan, methods, messages and contents; Learning and development plans for helping people work through the transition phase and live in the future changed state; Plans and activities for motivating/encouraging people to adapt to the changes; Plans and methods used to maintain the organisation's day to day business; Methods used to capture the learning from the changes and ensuring its sharing for future changes.

The following are examples of Project Management areas that were assessed during the Health Check.

Initiation of change projects; Project initiation documentation and objectives; Project scope, and measures of success; Milestone plans; Management of interdependencies between individual change projects; Formats and effectiveness of individual project plans; Identification, assessment and management of risks; Identification, reporting and management of issues; Management of stakeholders; Project reporting and reviewing; Change control process; Methods of closing down projects.

Outputs At The End Of The Change Management Health Check

At the end of the Change Management Health Check a detailed written report was produced, which described the strengths within the areas of change management and project management that were assessed.

Also described were areas that needed to be improved and how they could be improved, and the benefits to the Change Programme that would be achieved by improving these.

Detailed data to support the various findings and recommendations, were included in the report.

An executive summary was also produced, which summarised the key conclusions and key recommendations from the Change Management Health Check.

A traffic light system was used in this executive summary to prioritise the key conclusions in terms of the extent to which each element is there to the required extent. Also the traffic light system was used to indicate the degree of urgency of action needed to improve each element in the conclusions, based on how its absence prevents other elements being improved.

The key recommendations were prioritised using a traffic light system, to indicate the degree of urgency of action needed to implement each recommendation.

An action plan with time frames for implementing the recommendations was included within the executive summary.

Actions Following The Change Management Health Check

The Crown Estate has implemented the recommendations and action plan arising from the Change Management Health Check.