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Change Management Survey: Summary report

February 2023

Authors

This report was published by the Improvement Service's Change Management Team.

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Introduction

Towards the end of 2022, the Improvement Service (IS) distributed a Change Managers Network survey to all 32 Councils in Scotland. Following several recent Best Value audits and subsequent discussions with Councils about what resource others have in place to support change and transformation. The survey aims to gather a picture from across the country and gain insight into what support is currently in place. The Improvement Service recognise that all Councils are unique and set up to support local needs. However, this survey sets out to demonstrate where practice is similar and identify areas of difference.

The survey investigates how many Councils have a central Programme Management Office (PMO) or dedicated Change Team responsible for coordinating and managing change and transformation. For instances where Councils do not have this type of resource in place, the survey asks for details of any other approaches to managing change programmes and projects. Additionally, the survey looks at the types of job roles, salaries and skills that are available within Councils to support change and transformation and explores the main duties of a PMO/Change Team.

The following report is a summary of the key findings of the survey and will inform how the Change Team within the Improvement Service can support councils in delivering change and transformation.

Context

As way of background, the Improvement Service have undertaken previous surveys of change management. In the Spring of 2015, the Improvement Service presented the findings from a survey of change management teams across Scottish Local Government. Its aim was to develop a baseline of the scale and scope of change management activity across councils and present opportunities for potential support and sharing of practice. Towards the end of 2016 a second survey was distributed to all 32 Councils in Scotland intending to build on the information already gathered in 2015.

In December 2022, a survey was issued by the Improvement Service to the Change Managers Network intending to provide a more up to date picture of change management activity across the country and understand how Councils resource change and transformation. In recent years we have seen a number of significant structural, organisational and legislative changes that have taken place, which has impacted on Council change management activity. These include:

- ▶ The continued budgetary constraints faced by councils and the associated pressures on maintaining quality services that meet the needs and expectations of people and communities.
- ▶ The challenges of responding to, and now recovering from, the pandemic has dramatically impacted the size, shape and purpose of Local Government.
- ▶ Councils, along with the wider public sector and voluntary organisations are facing a new and significant challenge: the current cost of living crisis.
- ▶ The Climate Change agenda, and how councils can address these issues and deliver benefits for communities.
- ▶ The UK's exit from the European Union and the consequent impact on citizens, businesses, financial institutions, legislation and trade as new agreements are put in place.
- ▶ The increased demand to invest in technology and automation to improve service delivery, while ensuring all citizens have access to digital services.

With that in mind, this survey intends to capture information that will inform how Councils are positioned to enable response to the above. Therefore, questions around the following have been included to assist in providing this information:

- ▶ What arrangement each Council has in place (e.g. central PMO/change team) to support change and transformation.
- ▶ The scope of change teams, including the level of resource and the positions within each team.
- ▶ The skills and main duties required of each role to support change and transformation.

The following analysis identifies the key findings from the survey, but also attempts to derive the key messages for change management across Councils. It is the intention to use the information within the Improvement Service to inform our approach around how best we can support councils with their change management activity, promote the sharing of good practice across the country and provide relevant and timely information to support the delivery of transformation.

Key Findings

The survey was issued to all 32 Scottish Local Authorities at the end of 2022, with a survey closing date towards the end of January 2023. 23 responses were received from the following councils: Aberdeenshire, Angus, Argyll and Bute, Clackmannanshire, Dumfries and Galloway, Dundee, East Ayrshire, East Lothian, East Renfrewshire, Falkirk, Highland, Inverclyde, Midlothian, Moray, North Ayrshire, Perth and Kinross, Renfrewshire, Scottish Borders, South Ayrshire, South Lanarkshire, Stirling, West Dunbartonshire, West Lothian.

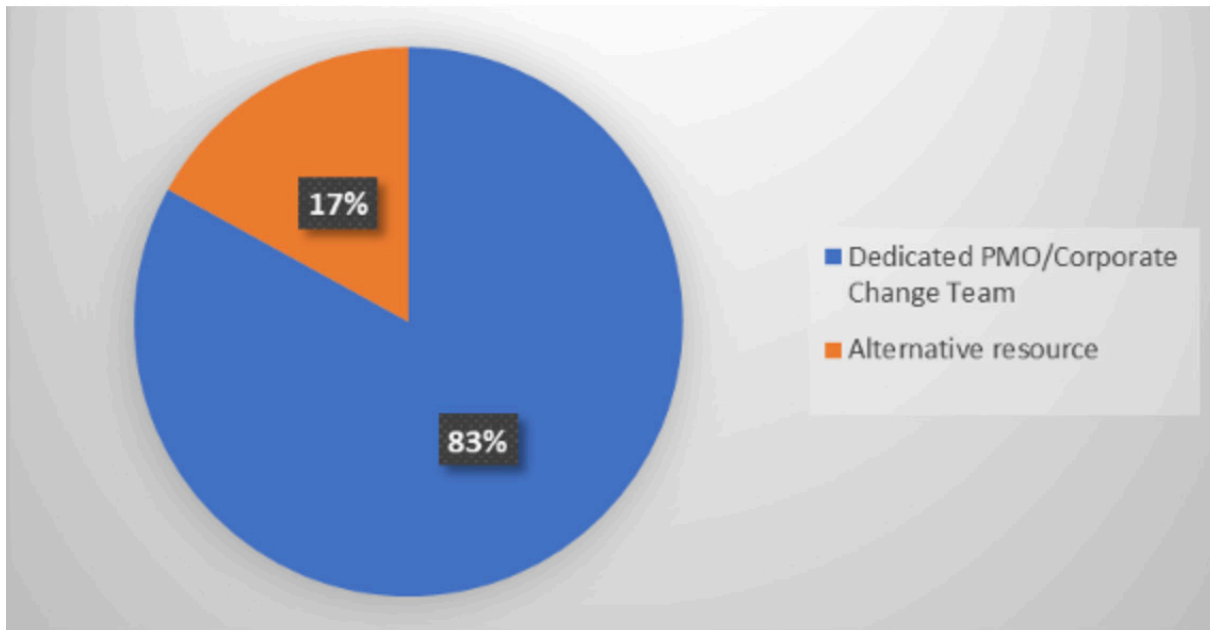
Summary of Findings

The following provides a high-level summary of the key points from the information gathered in the survey.

- 83% of respondents have a central PMO/Change Team
- 17% of respondents have other arrangements in place to support change and transformation
- The following roles are available within Councils to support change and transformation; Programme Manager, Project Manager, Business Analyst, Service Designer and Project Assistant. However, the structure and composition of change resources are individual to each Council and additional roles are noted in the findings.
- The following skills are expected and or desired but not limited to when working in change and transformation; Programme and Project Management Experience, Professional Qualification in Project Management, Coaching Skills, Mentoring Skills and Interpersonal Skills such as negotiation. Other notable skills are included in the findings.
- The survey findings suggest that employees within change teams are carrying out multiple roles. Respondents that have a central PMO/Change Team states that their main duties include Supporting Governance for Projects (86%) and Building Skills Capacity in Change and Transformation (77%).

83% of respondents stated that their Council has a central PMO or Change Team, with similarities in relation to the main duties change teams have responsibility for. Furthermore, the survey findings suggest that employees within change teams are carrying out multiple roles. Comparatively, 17% of respondents stated that they have alternative arrangements in place to support change and transformation. This includes projects being managed by the Service with oversight from the Corporate Management Team and a series of strategic boards and project teams within and across service areas.

Change Resources



Analysis from the survey shows that 83% of respondents have a dedicated PMO/corporate change team in place. Of the 17% that do not have a corporate change team in place, arrangements are individual to each of the Councils. These include; temporary appointments to work on specific projects. An example of a temporary team consists of a temporary head of service, senior project officer, an admin support post and an additional project officer.

Another Council has several transformational reviews ongoing which are led by a Head of Service, who is responsible for the progress of the review in line with the Council's transformational review toolkit and ensuring progress is reported to the Corporate Management Team.

One Council noted that their Transformation and Change Programme is aligned with strategic plans and delivered via a series of strategic boards and project teams within and across service areas.

Another has an overarching Corporate Change Programme which keeps track of the key change projects occurring across the Council with oversight by the Corporate Management Team and annual updates going to Committee. Projects are managed by the Service and updates provided to the relevant Service Committee. They also have three Directorate Change Boards which involve changes in service delivery.

Another approach brings together HR, OD, a programme/ transformation manager and those involved in skills and culture change into a change project team which is led by the Chief Executive.

The survey findings suggest that there are similarities in the staffing roles within Councils. However, it is important to note that across each Council there are variations in the job titles used to define the same or similar roles. It must also be highlighted that change is embedded in a number of job descriptions, including those with a wider remit of responsibility.

Of those 4 Councils that do not have a central PMO/Change Team in place the survey shows that 2 Councils have the following roles available to support change and transformation; Programme Manager (100%), Project Manager (50%), Business Analyst (50%), Service Designer (100%) and Project Assistant (100%)

Other roles that are noted include Service Manager - People and Change Management, Business Change Manager, Technical Project Officer, and HR Assistant.



Where Councils have a central resource in place results show that the following roles make up most central PMO/Change Teams; Programme Manager (38%), Project Manager (42%), Business Analyst (46%), Service Designer (55%) and Project Assistant (47%).

Other responses include; Programme Co-ordinator, Compliance and Performance Officers, CI Leads, Data Lead, Digital Officer, Business Improvement Officer, Business Change Leads, Senior Business Change Leads, Change Manager, Transformation Officers, PMO Administrator, Modern Apprentices in Project Management, Communication roles, Finance roles, HR roles, Change Leaders, Assistant Project Managers, Portfolio Co-ordinator, Governance officer, Adult social care portfolio lead, Product Owners, Business System Developers, Assistant Improvement Officer and Systems Officer.

It is important to note that some senior corporate roles, such as Service Managers for Transformation and Performance, Head of Chief Executive Service and Strategic Directors have a wider remit but play a major role in managing Transformation.

Moreover, one Council noted that they also use external consultants as and when required as well as short term secondment opportunities for specific roles that support key pieces of transformation. Another noted that their team has several temporary posts to support large transformation programmes if skillset is required.

Further analysis shows that the following roles are available in Councils out with the central PMO/Change Team to support change and transformation; Programme Manager (100%), Project Manager (64%), Business Analyst (67%), Service Designer (67%) and Project Assistant (80%).

Change resource is unique to individual councils, in both instances, whether a central resource is in place or not, an emerging theme was that Service departments support their own improvement activity and manage individual change projects. One council stated that their dedicated transformation team

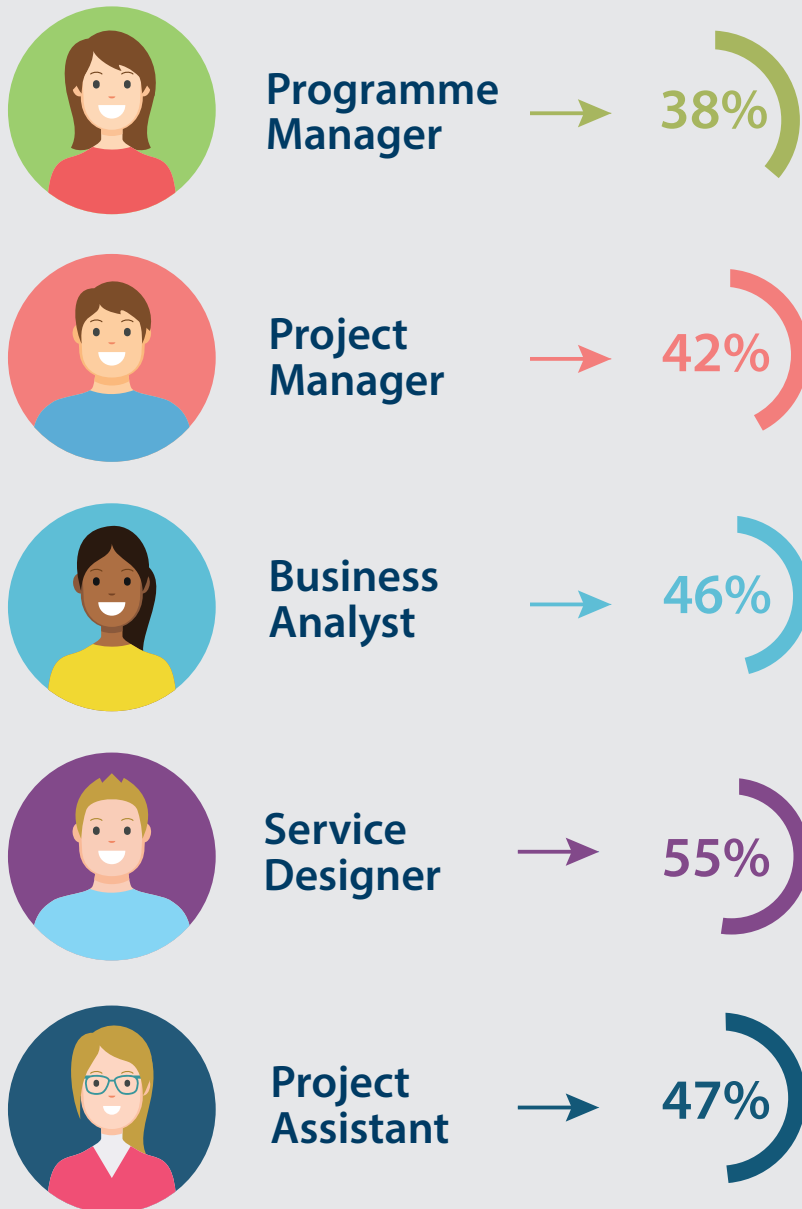
was restructured, and Change Management was mainstreamed within Services as part of a Council-wide Management Restructure which also created a new Corporate Support Service and a Corporate PMO responsible for Strategic Planning, Performance Management, Best Value, Community Planning, Data Analytics, Service Planning, Executive Business Support and Equalities & Diversity. While another noted that their Transformation Team is the corporate resource for priority Change & Improvement projects. However, services across the council also have various project and programme related posts, from generic skill sets to subject matter expertise (e.g. construction).

Additional roles that support change and transformation are also dedicated to specific transformation programmes within councils. Including; Digital Transformation and IT, Climate Change, Zero Waste, Family Wellbeing Partnership and Construction and Capital programmes.



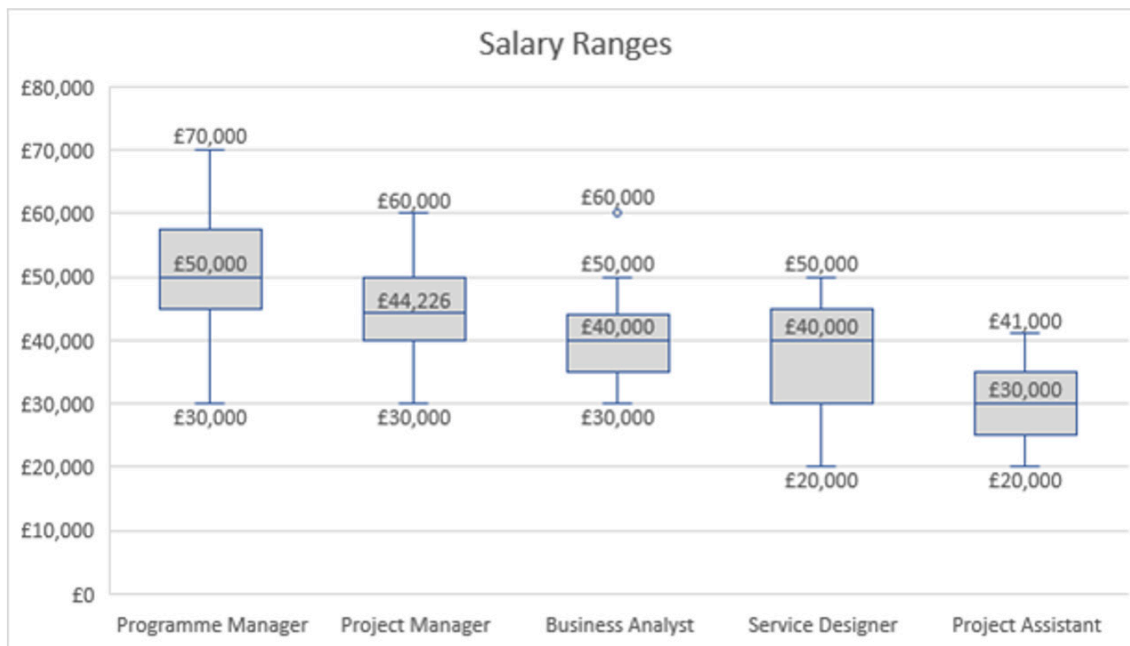
Change Manager
 Senior Business Change Lead Business System Developers
 Business Improvement Officer Adult Social Care Portfolio Lead Data Lead
 HR Assistant Change Leaders HR roles PMO Administrator Business Change Lead
 Modern Apprentices in Project Management Technical Project Officer Communication roles
 Business Change Manager Service Manager - People and Change Management Governance Officer
 Compliance and Performance Officer Transformation Officer Assistant Improvement Officer
 Assistant Project Managers Portfolio Co-ordinator Product Owner CI Lead
 Systems Officer Programme Co-ordinator Finance roles
 Digital Officer

Make-up of a typical PMO where councils have a central resource in place



The responses show the salary range and skills set for specific roles as set out below. Variation across salaries exist due to differences in the remit of responsibility and roles outlined in job descriptions.

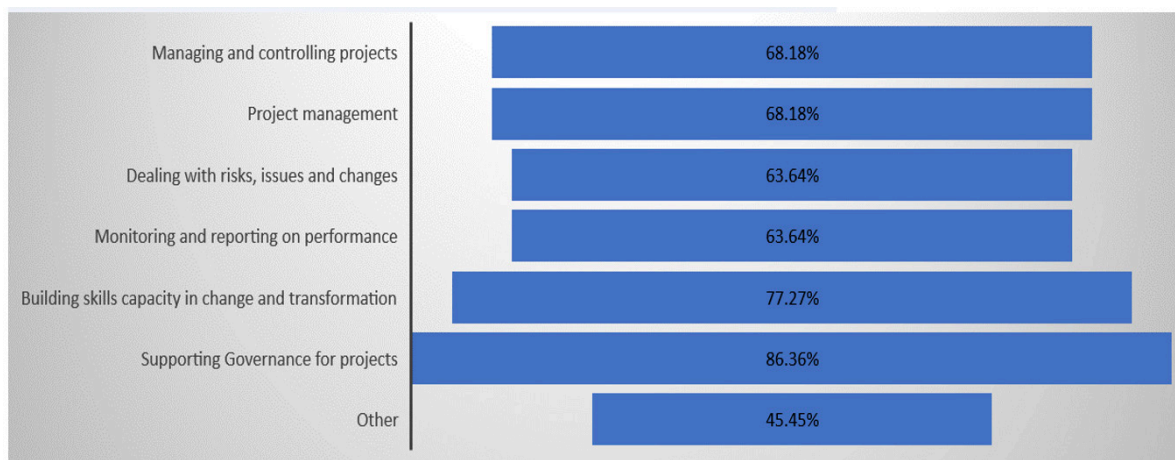
Please note that the salaries displayed below are inclusive of all roles both within a central PMO/ Change Team and those that lie out with:



Job Role	Salary	Skills Expected
Programme Manager	£30-70K	Project and programme management qualifications (PRINCE2, MSP, Better Business Case, APM), Degree in Management (e.g. HR, Accountancy, Business Management) or equivalent, strategic leadership of change & improvement experience, programme management experience, team management, experience working with Directors, project management experience, experience working in a multi-disciplinary/partnership, experience leading the development of policies and strategies, experience leading a service design/delivery, experience in contributing to the development and implementation of a Target Operating Model, experience in managing strategic and operational change, experience of the organisation and managing change, ability to identify efficiencies, ability to co-ordinate competing demands and programmes with multiple projects/workstreams, coaching skills, mentoring skills, customer care skills, analytical skills, report writing skills, people management skills, attention to detail, interpersonal skills including negotiation and influencing skill, skilled in project management methodologies and service reviews, risk management and change knowledge.
Project Manager	£30-60K	Project management qualification (Prince2/APM), project management skills and experience, business change & improvement experience, report writing, service design, highly developed general business management competencies, digital project management and project co-ordination.
Business Analyst	£30-60K	Prince 2, HND qualification in a related discipline, ICT experience, data & business analysis skills, highly developed process knowledge, analytical skills and communication.
Service Designer	£20-50K	Knowledge of Scottish Approach to Service Design and service design experience to build capacity across organisation.
Project Assistant	£20-41K	Project management knowledge and skills, organisational skills, completer/finisher, ability to complete general project tasks.

The survey findings suggest that employees within change teams are carrying out multiple roles. Approximately 68% of respondents stated that their change team had a role to play in managing and controlling projects. 68% are involved in project management and 64% deal with risks, issues and changes.

64% of respondents said that their change teams are involved in monitoring and reporting on performance. Building skills capacity is crucial in change and transformation and 77% of respondents stated that this was a main role of their PMO/change team. Supporting governance of projects also plays an important role in change management and 86% of respondents noted this is a main role of their PMO/change team.



The overarching purpose of a central PMO/Change Team is to support and drive the Council's transformation programme(s) and change projects to deliver service improvements and budget savings. Other roles which enable this purpose include;

- ▶ Supporting project management staff with provision and completion of project documentation
- ▶ Supporting design and delivery of project-related workshops and Board meetings
- ▶ Advising on governance arrangements such as membership of Boards
- ▶ Facilitating and supporting projects to undertake benefits realisation work e.g. developing and implementing guidance.
- ▶ Supporting and advising projects on reporting into Boards and facilitating training on the requirements for this

- ▶ Provision of staff time for short-term interventions/improvement initiatives
- ▶ Facilitating overall awareness and promotion of Programme and knowledge-sharing opportunities through the likes of PMO Drop-in
- ▶ Generating new projects
- ▶ Generate efficiencies and savings to achieve financial sustainability
- ▶ Empower and upskill staff to deliver the transformation required
- ▶ Works across the council portfolios to deliver and support transformation activities, including working with internal and external key partners
- ▶ Delivering change management aspects of projects.
- ▶ Benefits tracking and management.
- ▶ Community engagement.
- ▶ Business Intelligence / Analysis work.
- ▶ Facilitating culture change events.
- ▶ Providing direction, guidance and develop working tools including a Transformation and Change online toolkit
- ▶ Developing templates, a fit for purpose process of project initiation and governance structure
- ▶ Establish a Transformation & Change Board and a Programme Support Team of staff from key areas (Finance, HR, Comms, Programme Management, Change Management)
- ▶ Develop and manage programme management tools (risk profiles, interdependency mapping, issues and change process, programme plan etc)
- ▶ Monitor progress towards achieving targeted savings

The survey unveiled some other relevant information about the composition and role of change resource within councils. One Council's Transformation Team, in addition to providing corporate resource for priority Change & Improvement Projects, leads on Process Improvement (in particular Lean), and provides an internal consultancy role across Services for supporting effective progress of initiatives to deliver expected benefits - this includes commercial and income generating opportunities, establishing the business case and managing delivery.

One Council recently amalgamated their Corporate and Digital Transformation Teams into one team. While another Council has a corporate Strategic Change Team which delivers projects of a business change aspect. Additionally, their ICT department has a PMO which manages and delivers ICT projects which at times can be transformational and business change related. They also have a Special Property Projects section which delivers high value construction projects, such as schools and other new builds, including Growth Deal projects.

Conclusions

The purpose of this survey was to capture relevant information that will inform how Councils are positioned to respond to any immediate and future challenges or opportunities that require change and transformation.

The Improvement Service acknowledge that all 32 Local Authorities in Scotland are unique in terms of demographics, geography and local citizen's needs. However, despite variation across the country the survey results found commonality in change management resources. Specifically, the survey findings have revealed that most councils have a dedicated central PMO/Change Team in place. Furthermore, analysis highlighted that change is taking place at multiple levels within Councils and is embedded in a number of job descriptions. Corporate Management Teams have a collective responsibility to drive change across the organisation, central PMO/Change teams are corporate resources for priority change and transformation programmes and Services are responsible for managing their own change programmes and projects.

Furthermore, there is consistency in the composition of Change Teams. However, it is important to note that across each Council there are variations in the job titles used to define the same or similar roles. It must also be highlighted that change is embedded in a number of job descriptions, including those with a wider remit of responsibility.

Key conclusions we have drawn from the survey, are as follows:

- ▶ Most Councils (83%) have a dedicated central PMO/Change Team in place to drive and manage change and transformation.
- ▶ 17% of respondents have alternative approaches to managing change and transformation. Including temporary appointments to deliver change and implementing change within Services.
- ▶ Change is taking place at multiple levels within Councils with Corporate Management Teams having a collective responsibility to drive change across services and frontline staff having the responsibility on an operational level to deal with changing needs and resource.
- ▶ Councils are at different stages of developing their approach and response to change and transformation.

Support

It is the intention to use the findings of this survey within the Improvement Service to inform our approach around how best we can support Councils with their change management activity, promote the sharing of good practice across the country and provide relevant and timely information to support the delivery of transformation.

As a reminder the Change Team at the Improvement Service have various support measures in place, including;

Change Team Offer

The change team at the Improvement Service helps councils and their partners to deliver transformational and operational level change. Our support offer is based on what councils have told us they need as well as research into the overall challenges facing the sector so that we can offer support on a proactive basis. The services and products offered by the change team are free to all Local Authorities across Scotland.

Further information available at https://www.improvementservice.org.uk/__data/assets/pdf_file/0013/12514/Team-offer-V3.pdf

Case studies available at <https://www.improvementservice.org.uk/products-and-services/consultancy-and-support/change-management/change-management-case-studies>

Professional Development Award in Project Management

Scotland Excel continue to deliver an SQA-accredited qualification for people working in change management. The Professional Development Award (PDA) is a SCQF (Scottish Credit and Qualifications Framework) level 8 qualification and is certified by the Scottish Qualifications Authority.

The PDA consists of two units:

- ▶ Project Management: Project Justification and Planning
- ▶ Project Management: Managing the Implementation of a Project

The PDA is well established as a standalone qualification but can also provide progression to other learning opportunities such as the Diploma in Management and Leadership at SCQF level 8.

For more information about the PDA, contact Donnie MacRae at Scotland Excel.

General information about the PDA can be found at <https://www.sqa.org.uk/sqa/39450.html>

The Change Managers Network (CMN)

The CMN host regular virtual events and are active on the Knowledge Hub. Joining the CMN will provide you with a space where you can ask the members of the network for help and support & assist others with their queries, receive updates from the Change Team on work we are involved with, access to free events, webinars and opportunities, anytime access to tools and templates, access to reports, research and documentation on key topics to help with your projects and a place to share and capture good practice examples and lessons learned.

Sign up to our Knowledge Hub Group at <https://khub.net/group/change-managers-network-scotland->

Further Information

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<http://www.improvementservice.org.uk/change-management.html>

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