A framework for communicating people change

This framework has been produced by the internal communications team to assist project managers and leaders of new services with the planning and creation of communications during a people change process. The framework is based on the PSOM programme including the related HROD processes and lessons learned during this change process.

Whilst the framework outlines the best practice for communications during a large-scale service design project, the principles and advice throughout can be applied to other types of change projects, including those of a smaller scale, and adapted as required.

Adhering to the framework and guidance where possible will ensure greater consistency and effectiveness of change communications at SHU.

Contents

1. Change comms principles

1.1 Project communications planning

A communication plan should include two main sections. One of these should focus on strategy and contain the key messages and communication objectives of the project. The other should include a thorough account of all planned communications and engagement activity. This will provide a useful overview of the information that is being presented to staff and is also a valuable resource when conducting reviews or audits.

The **key messages** for your project should be determined in the early stages of work and include the what, why and how of the project, as well as the project's aims. They should be included as part of the communications plan and used to shape the initial communications from the project and inform future messaging. It is useful to create a resource presenting these in an accessible and visually engaging way which can then be linked, or attached, in later communications.

General tips:

- Aim to get the same message out to all affected staff at the same time. If staff groups receive information at different times, this can lead to increased anxiety and the possible distortion of messages.
- Engagement with the project will vary amongst colleagues therefore it is important that each communication makes sense as a standalone item: it should not be assumed that colleagues will have received or accessed prior updates.
- For each communication item you should consider how you would like your audience to react to the information and what action you would like them to take. Be explicit about this latter point where necessary.
- Provide clear instructions to managers in relation to cascading information, especially in cases of sickness absence, leave, maternity leave, part time working patterns etc.
- Appointments to posts, particularly those at a senior level who will play a role in the change process, should be announced as soon as appropriate. Consideration needs to be given to staff who do not yet have certainty over their roles.

1.2 Language

The language used during a change process often includes jargonistic and specialist vocabulary. When considering communications for the wider audience it is important to ensure that plain English is used throughout. Remember that the meaning of a word in the context of the project may differ from its commonly understood meaning.

If you are concerned that a word or phrase may not be widely understood, then consider rewording or provide a definition or clarification within the text.

Below is a list of the key terminology used during a change process with usage guidance for each term. The guidance below should be followed to ensure these terms are used consistently throughout the project and can be shared with staff to aid understanding.

Project sponsor – The individual with overall accountability for the project (or a strand thereof). Once appointed, the director of a new service usually fulfils this role. In this case, use their job title in communications to all staff, rather than 'project sponsor'.

Design principles – Often created in the early stages of a change project, a concise interpretation of these can be integrated into the key messages. 'Design principles' won't mean much to most staff; use 'project principles' or include them as part of the project aims.

Discovery phase - In this phase, information is gathered through workshops and meetings with staff in a specific area of the university in order to gain an understanding of how that area currently delivers its services.

Structure design phase – New structures are designed based on the information gathered in the discovery phase. The phase includes consultation with affected staff.

Implementation phase – Begins with the sharing of a formal **implementation document** including confirmed structures and outcomes for ringfencing and matching as well as confirmed timescales for selection process and Voluntary Redundancy, if applicable. This document will form the basis of the implementation process and formal individual consultation meetings delivered by HROD in this phase.

Functions – The core activities carried out by a service, team or directorate.

Functional model – Shows how key activities will be organised and grouped in the future.

Service – A part of the University responsible for delivering certain functions.

Service catalogue – Documents the volume of the different processes and activities undertaken across a service and what is required to deliver these.

Service offer – An accessible summary of the information in the service catalogue – specifically the services provided by a specific team or directorate.

In scope – Services, teams or individuals that are directly affected by the change process. HROD will provide further detail on this, including who is in or out of scope, as part of the change process.

Current state – The existing structures and services as they exist before the change process has begun.

Future state – The anticipated organisation of services and structures after the change process has completed.

Meaningful consultation period – Formal HROD consultation process for a period of at least 3 weeks (SHU agreed approach)

1.3 Project overview

A plan showing the anticipated timescales for the major milestones in a project is valuable resource for staff. Where processes are subject to change, provide indicative timescales rather than specific dates and always make it clear that the plan is a working document and will be updated as the project progresses. Specific dates are helpful but should only be used when details are confirmed to reduce the risk of complaints.

Frequently asked questions by staff during a change process often relate to what the next steps are and when they will personally be affected. Providing a clear picture of how the current phase of work sits in relation to the broader project timeline can reduce anxiety and may encourage staff to focus their attention and queries on the current phase work.

2. Channels and media

Depending on the stage of the project and content being communicated, the channel and media type you choose to use will vary.

2.1 Emails

Using the same sender throughout (e.g. team or project mailbox) will make it easier for staff to search their inbox for relevant emails, consistent subject lines also help with this. Emails can be sent from the mailbox on behalf of a senior leader in the service to allow ownership of certain messages.

If bcc has been used, make it clear who the email has been sent to. This makes it easier for people to discuss the information with colleagues.

The **Change Programmes Update** is a fortnightly email sent to the Senior Leaders Group (SLG) for cascade to their areas with any additions they may wish to make. The email is also a chance to share information with SLG specifically, that is not for wider sharing. This email is a good way to share updates, such as consultation or response to feedback documents, with the wider staff group after they have been sent to affected staff.

2.2 Face to face events

Face to face events are a good opportunity to introduce colleagues to the key people involved in a project. Events may be used for providing reassurance and responding to questions from colleagues, collecting feedback from colleagues or for the sharing important information or documentation relating to the implementation process. Operate a booking system if required and run repeat sessions where necessary.

At the beginning of a session, make sure that all speakers introduce themselves and anyone from the team or project who is present and make clear whether there will be a Q+A component to the session.

If staff input is being invited at a session, it should be made clear how this input is being recorded and how it will be used. A reminder of the purpose of the session and the call to action for staff (if relevant) should always be included.

2.3 Local Information and Consultation Committee (LICC)

The LICC for an affected area is an effective forum in which to provide clarification and further detail on information that has been shared with all affected staff. It’s also a valuable channel through which to receive prompt feedback on the process via staff representatives and Trade Union colleagues, allowing for short notice changes to be made, such as the provision of additional workshops on a particular topic or the issuing of further information.

2.4 Training

Training for staff can form an important part of the communications in a project. Some training may be delivered by the project itself whilst some will be from HROD. Leadership development events (e.g. navigating, leading and delivering PSOM changes) can play an important role in enabling local leaders to take ownership of the change process, helping to prevent a ‘done to’ mentality.

2.5 Invitations (to events or training)

- State who the invitation has been sent to (especially where bcc has been used)
- Make it clear whether booking/registration is required and details of how to book (don’t assume, for example, that people will be familiar with Eventbrite)
- Clearly state the event type e.g. workshop, drop-in, presentation, Q+A (more on event types below)
- Clearly state what the session is aiming to do, and what it isn’t.
- State when and where the event is taking place
- Make it clear whether the event will be repeated or recorded.

2.6 Event types

- **Briefing**: providing information or instructions in relation to the next steps or phase in the project, for example initial sharing of implementation document. Q+A can be challenging in large lecture theatres but should be offered when appropriate and alternative feedback methods should always be highlighted.
- **Drop-in**: an informal session without a structured talk, staff can join at any time. Generally not suitable when larger numbers of attendees are expected.
- **One to One**: formal individual consultation meetings delivered by HROD as part of the implementation process **or** one to one meetings offered on an informal basis by directors to staff in their area.
- **Q+A**: more structured than a drop-in, where possible, aim to use a smaller room (no more than 50), as larger rooms can discourage dialogue.
- **Workshop**: A chance to collectively discuss a proposal and provide feedback, led by a senior leader. Provide a topic theme for each workshop and keep numbers relatively small.

2.7 Screencast and video

Providing information for those who have missed face to face events is important, however full-length session recordings are not always the best way to do this. Many staff have no method for playing sound from their work computer and analytics from previous videos have shown that very few people will watch for longer than 10 minutes.

With this is mind, full length recordings should only take place when the room has a lecture capture system to reduce the time taken to produce and share the recording. Where a new document or phase of work is being announced, a short (5-10 min) screencast or ‘talking head’ video, with accompanying slides, can be much more effective and is likely to attract more views.

Given the tendency for viewers to disengage with video content after the first 2-3 minutes, new and high priority information should be presented as near to the beginning of the video as possible.

Accessibility – *subtitles should always be included on videos. Uploading to YouTube is recommended as subtitles (referred to as closed captions) will be automatically generated (these should be proof-read as minor edits may be required).*

2.8 Project intranet site

Setting up an intranet site for the project provides staff with somewhere to access information at their convenience and to view the full range of information available. The site can also be used as a repository for documents that can be linked to from other communications.

2.9 All staff channels

When a significant update is issued, such as the sharing of a new consultation document or structure chart, using existing all staff communication channels can be a good way to achieve wider reach. This is especially useful if you are looking for wider engagement with a consultation process or when the implementation of a change has implications for staff outside of the immediately affected area.

3. Comms timeline

The terminology used here may not precisely reflect the way work is segmented within the project but instead divides the work into phases that reflect the experience from a staff perspective. The phases are defined in more detail in the language section (1.2), along with some of the other terminology used below.

Guidance relating to all of the media types and channels referenced below can be found in the channels and media section (2.0).

3.1 Discovery phase

Activity	Who should deliver?	What should be included?	Who should recipients be?	When should it be delivered?
Face to face briefing	Project team	• Reminder of project goals and key messages and the role senior leaders will play in achieving/delivering these • Information on what this phase will involve	Senior leaders in relevant area	Shortly before engagement with wider staff group begins
Face to face briefing	Project team	• Summary of project aims and key messages • Why the discovery exercise is taking place • What will happen in this phase, and the level of involvement staff will have in the process. • What will be done with the resulting information and when	All staff in relevant area	In the week before workshops with staff begin
Email to affected staff	Project team	• As above • Include a link to a screencast for those who missed the session	Staff in relevant area	In the week before workshops with staff begin
Workshops	Project team	• A theme for each workshop based around one or more questions to provide a clear goal and ensure that the necessary information is gathered	Staff in relevant area and any key stakeholders	During pre-defined ‘discovery phase’

3.2 Functional design phase

Activity	Who should deliver?	What should be included?	Who should recipients be?	When should it be delivered?
Proposed functional model slides (consultation document) shared face to face	Directors of service, supported by project team	• Reminder of the previous phase of work and *brief* reminder of project aims and principles with links to further info. • What a functional model is • Details of the proposed functional model • Suggested questions to consider when providing feedback • Feedback methods and deadlines • Any information we can share on the proposed timeline for change	Staff in affected areas	Beginning of consultation period
Proposed functional model emailed to all invitees of above briefing	Project team (on behalf of service directors)	• As above • Include a link to a screencast for those who missed the session. This should be a shortened version of the full presentation.	As above	ASAP after face to face briefing
Proposed functional model slides and screencast made available to all staff via intranet site and highlighted via all staff channels (e.g. change programmes update)	Project team	• Concise accompanying text explaining what the proposed functional model is and why it is being shared • Feedback methods and deadlines • Suggested questions to consider when providing feedback	All staff	At least one day after sharing with affected staff

Drop-ins/workshops/Q and A sessions (Directors of service determine most appropriate methods)	Service directors and managers	• Make it clear how feedback is being gathered at these events and how it will be used • Use the suggested feedback questions from the proposed functional model slides to theme each workshop	Staff in affected areas	During consultation period
Response to feedback document (PDF file) emailed to affected staff	Project team	• Address the suggested feedback questions individually as well as any other significant themes from the feedback	Staff in affected areas~~,~~	ASAP after the end of consultation period
Response to feedback document shared with all staff via project intranet site	Project team	• As above	All staff	At least one day after sharing with affected staff

3.3 Structure design phase (including meaningful period of consultation)

Activity	Who should deliver?	What should be included?	Who should recipients be?	When should it be delivered?
Consultation document, including proposed structures, shared face to face	Directors of service	• Reminder of the previous phase of work and *brief* reminder of project aims and key messages (provide links) • A run-through of the structures and the rationale behind the design. • Details of roles in the proposed structure, including draft role outlines and indicative grades • Suggested questions to consider when providing feedback • Feedback methods and deadlines • Proposed timeline for the change process • Details of support for staff	Affected staff and their managers	Beginning of the consultation period

Consultation document, including proposed structures, emailed to all invitees of above briefing	Project team (on behalf of service directors)	• As above • Include a link to a screencast for those who missed the session. This should be a shortened version of the full presentation.	As above	ASAP after face to face briefing
Consultation document and screencast made available to all staff on project intranet site and highlighted via all staff channels (e.g. change programmes update)	Project team	• Concise accompanying text explaining what the structure design shows and why it is being shared • Feedback methods and deadlines • Suggested questions colleagues may wish to consider when providing feedback	All staff	Beginning of consultation period
Engagement and support opportunities (drop ins/workshops/Q and A sessions) *Directors of service should ensure flexible availability at this time in order to offer further sessions in response to feedback gathered from prior sessions and LICC*	Service directors and managers, supported by HROD where appropriate	• Make it clear how feedback is being gathered at these events and how it will be used, including that the process itself may be modified in response to feedback (e.g. the provision of more engagement opportunities on a particular topic). • Give each session a theme based around one or more questions	Staff in affected areas	During consultation period
Response to feedback	Project team (on behalf of service directors)	• Address the suggested feedback questions individually as well as any other significant themes from the feedback	Staff in affected area	ASAP after the end of consultation period and as per change timeline shared with staff
Response to feedback document shared with all staff via project intranet site	Project team	• As above	All staff	At least one day after sharing with affected staff

3.4 implementation phase

Activity	Who should deliver?	What should be included?	Who should recipients be?	When should it be delivered?
Implementation document shared with affected staff	Directors of service	• Confirmed structure charts, including number of roles, FTE and grades • Job descriptions and person specifications for all roles • List of affected staff and their options (i.e. matched, ringfenced, able to apply for VR etc) • details of support for staff • details of match panel process • details of VR process, if applicable • appendices as necessary, for example forms for staff to complete (e.g. expression of interest form) • who the document has been shared with • summary of next steps, including drop-ins	Affected staff and their managers	Beginning of the implementation phase
Implementation document emailed to all invitees of above briefing along with formal implementation document	Project team	• As above, with inclusion of formal implementation document • Include a link to a screencast for those who missed the session. This should be a shortened version of the full presentation.	As above	ASAP after face to face briefing
Confirmed structure charts and screencast made available to all staff via intranet site and highlighted via all staff channels (e.g. change programmes update)	Project team	• Confirmed structure charts • Summary of next steps	All staff	At least one day after sharing with affected staff
Formal individual consultation meetings	HROD and senior leaders/ managers in	• Meetings arranged and conducted by HROD and leaders/ managers in area affected	Invitations sent to staff individually	Following publication of implementation

	area affected			document.
Progress updates on processes as relevant, for example VR and/or selection	Project team/senior leaders once in post	• Detailed updates on the relevant process	Affected staff	As required during implementation phase
Progress update on appointment process via established all staff channels (e.g. change programmes update)	Project team/senior leaders once in post	• General updates on progress (e.g. which grades appointment activity is currently taking place at + those which are now complete)	All staff	At regular intervals during implementation phase
Confirm appointments	Project team	• Announce appointments at senior and management levels	Staff in affected area, subsequently make available to all staff	1-2 days after affected staff have been informed

3.5 Preparations for service launch (project to support during this phase but directors of service to be official senders of messages)

This phase begins once the formal HROD change process is complete.

Activity	**Who should deliver?**	**What should be included?**	**Who should recipients be?**	**When should it be delivered?**
Updates to affected staff	Senior leaders in service with support from project	• Ensure affected staff are kept up to date through direct email contact on issues such as location changes, systems/process changes and the anticipated date of the service launch	Affected staff and their managers	As required
Updates to all staff	Senior leaders in service with support from project	• High level updates on progress towards service launch, including any significant location changes and technology changes. • Share structure charts, with names included where possible. • Share details of any vacancies with information about how they will be filled (i.e. ringfenced to a certain group, advertised internally/externally etc and why)	All staff	At regular intervals through change programmes update
Service catalogue	Project team	• Service catalogue, which may need to be modified to improve accessibility for all staff.	All staff	Close to time of service launch

3.6 Transition to new ways of working (from service launch onwards)

Communications during this phase should be delivered from within the new service with support provided from the project team where appropriate. Exceptions to this may include development work being overseen by the project which continues beyond the service launch date, such as the implementation of new technology.

Communications at this phase will vary according to the transitional arrangements required. In some cases, staff will enter new posts but not immediately move to new ways of working or new locations. It is important to share this information both locally and with the wider staff group in order to manage expectations. Standard all staff channels should be used.