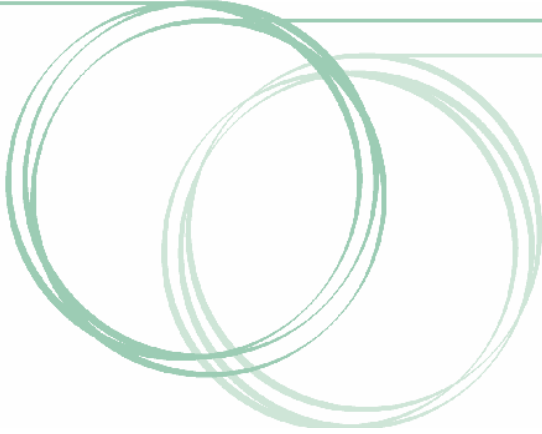


Developing Internal Consulting Capability within the National Trust



Submission Paper

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Ashridge Consulting and the National Trust



Contents

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Introduction.....	3
1 The Challenge	4
2 The Commitment	6
3 The Learning and Development Initiative.....	9
4 The Impact.....	12
5 Reflections	15
6 Bibliography	15
Appendix 1 Evaluative Inquiry Process	16



Introduction

Ashridge Consulting is part of a leading European Business School and specialises in:

- strategy engagement
- leadership development
- organisation and culture change
- HR and talent management
- virtual working

Our consulting is grounded in serious theoretical knowledge and ongoing research while our work is highly practical. We believe that sustainable business can only be achieved through a genuine understanding of and preparedness to address the complex issues people in organisations are faced with in today's social, economic and environmental context. We work collaboratively with clients to help them develop their own ways of running successful, sustainable and responsible businesses.

The National Trust is a charity, working to look after special places comprising heritage buildings and collections, countryside and coastline of England, Wales and Northern Ireland, through practical conservation, learning and discovery, and encouraging everyone to visit and enjoy their national heritage.

We conserve and open to the public over 350 historic houses, gardens and ancient monuments. We also educate people about the importance of the environment and of preserving our heritage for future generations, we contribute to important debates over the future of the economy, the development of people's skills and sense of community, and the quality of the local environment in both town and country.



1 The Challenge

Preserving a green and pleasant land, studded with its palaces, castles and stately homes that house some of our nation's greatest artistic treasures, is no mean challenge. It's an even greater challenge when that restoration and conservation for the benefit of future generations is dependent on income generated not just by legacies but by 3.7m members and 65m visitors: people who want to support and preserve, but many who simply want to have a great experience, today!

Fulfilment of everyone's aspirations depends on the myriad skills and capabilities of a workforce of employees and volunteers across England, Wales and Northern Ireland, as diverse as the landscapes and properties under the Trust's protection. Archaeologists, financial managers, conservators, cleaners, marketeers, curators, retailers and more combine to ensure a memorable experience at any of the 350 managed properties and sites as well as in the open access fens, moorland, beaches, nature reserves and archaeological sites.

People management (HR management) within the Trust has to nurture the talents and resources of a vast multitude of workers and volunteers. This is vital to the pursuit of increasingly commercial goals that must be reached if the Trust is able to meet the demands and challenges of legacy, experience in the moment and future benefit. In 2007 the Trust determined that one of its major strategic objectives was to strengthen and support the operational managers. In particular, the role of Property Manager at 40 of the Trust's most complex properties was to be enhanced, consistent with the strategy of putting its properties at the heart of the Trust's activities. They were re-named General Managers and given more responsibility and accountability. They were charged with pursuing the corporate goals of **Engagement** – with the many stakeholders, supporters, visitors and local communities, and **Relevance** – providing real public benefit to modern life and the visiting public who provide the revenue stream.

Key members of the Trust's Senior Management Team (SMT) instrumental in this decision (eg. the Director of People and Governance, the Director of Conservation and the Director of Marketing and Supporter Services) recognised that as power shifted to being held locally at properties, Functional Advisers would have to develop skills of consulting and influence in order to support and challenge the General Managers in their policy and decision making. They needed to deliver a collaborative, client-centred service, recognising the General / Property Manager as the decision maker. There needed to be a change in the organisation away from silo working and towards accessing integrated advisory services, with relationships of real trust being developed between the Managers and the Advisors.

The role of Functional Advisor was now crucial to helping General Managers meet their goals and targets. In his speech to the 2008 Leadership Conference, outlining the changing role of the Functional Advisors, Director of Conservation, Peter Nixon, stressed: *"We need to ensure that all activity is wholly **aligned to the Strategy** and focused on helping properties and the Trust achieve the key output measures or KPIs."*



The National Trust recognised that a development programme was needed for its Functional Advisors. The **desired impact** of the programme can be summed up in its title: ***Developing Internal Consulting Capability***. This meant first and foremost developing the consultants: in this case, the Functional Advisors. It was going to be a question of personal and organisational development. The programme would have to support and challenge behaviours and attitudes in order to deliver the commercial and business objectives vital to the Trust's performance. It would also have to address the difficult issues that often accompany change and restructuring – such as loss of power, trust and role identity. This was no mean task, so the Trust sought an external L&D partner to assist them.



2 The Commitment

The enquiry begins

The National Trust invited potential providers to submit ideas for the design and delivery of the programme.

The Ashridge Consulting approach was distinctive from the outset – instead of prescribing and presenting a suggested programme of development, the Consultants, Billy Desmond and Martyn Brown, entered into dialogue with Jonathan Noall, Senior Training & Development Manager, and Paul Etheridge, Organisation Change Manager, in a spirit of exploration and enquiry, to co-create and co-design a programme that would deliver the required impact.

So even at the stage of tender, the approach adopted was entirely congruent not only with the way in which the programme would be designed and delivered, but with Ashridge's ethos of what constitutes best practice consulting skills.

“Ashridge Consulting’s approach to the tender actually enabled us to see, in action, the approaches and skills that would be deployed throughout the programme and transferred to our Functional Advisors. We were able to road test what it would be like to invite Ashridge into our organisation. It was a compelling way to approach the assignment and we haven’t been disappointed.”

Jonathan Noall, Senior Training & Development Manager

Ashridge Consultants visited some key properties and met managers and advisors, to gain an appreciation of the business, its people and their challenges. This very process helped unleash the knowledge and creative thinking of people who knew the organisation best, informing the content and structure of the co-designed programme. The process also built confidence that Ashridge and the National Trust could have a collaborative relationship.

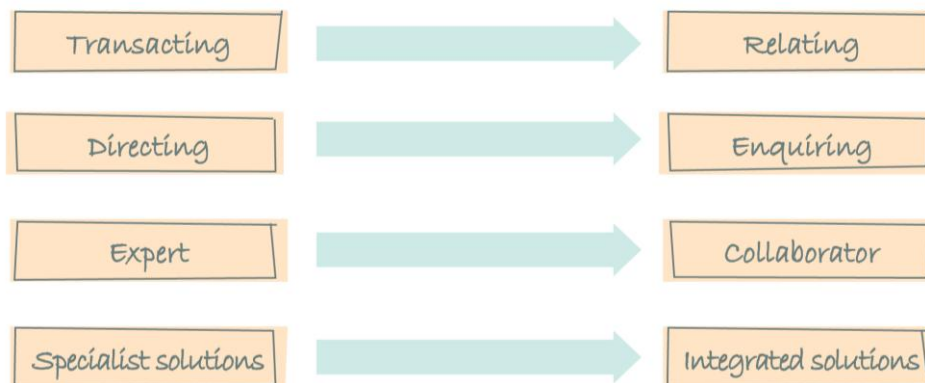
An initial contract

When Ashridge was awarded the tender, it was agreed that there would be three pilot iterations between November 2008 and February 2009, out of a total of eight initially contracted. Each programme consisted of a three-day residential module at Ashridge for a group of 12 Functional Advisors, working with Ashridge Consultants, followed by Action Learning sets on four half-days over the next ten months.

The spirit of enquiry in which the programme was co-created did much to guarantee the support of the stakeholders, who became certain that this was no “off-the-shelf learning package”, but really designed to develop the Functional Advisors who are so crucial to enabling the National Trust to meet its strategic goals.



In practical terms, this meant developing them to think and act differently – to deliver added value and to learn and hone consulting skills to become even more effective in helping the Trust secure its strategic and commercial objectives. Behaviours needed to change:



These individual role changes needed to take place in the context of the changed organisational structure, with Advisors being mindful that their activities should be a representative of the way the Trust as a whole is changing. For Functional Advisors, the implications are:

- A 'central push' replaced by 'property pull' for advice
- All activity being wholly **aligned to the Strategy** and focused on helping properties and the Trust achieve the KPIs
- Advice being delivered in an integrated way, with specialist advice in one area taking as much account as possible of its impact on other areas
- A more robust attitude to risk, allowing for creativity and experimentation with safe parameters
- A more realistic yet ambitious approach to what can be achieved: a focus on enabling the property to achieve the vision through collaborative partnership and problem solving
- Awareness of the Trust's long-term aim to fulfil the requirement of its 1908 Act to promote conservation of and access to special places for ever, for everyone

Given the background, this was not the easiest assignment. Decision-making powers and control of budgets and teams are commonly viewed as metrics of the importance of organisational roles. It's not surprising that the news that many of the Functional Advisors' powers were being transferred to the 'front end' Property Managers provoked a mixed reaction. Some struggled with the concept of loss of power and the change of professional identity. However, the programme provided the space to reflect upon such reactions and work towards developing new expertise and capabilities that built on past strengths and experience.



.....Extended by popular request

The nature of the programme and the **impact** it had on the Functional Advisors and those who experienced their new ways of relating and working meant that demand was created for additional programmes. Far from being development that was 'pushed' by the Senior Management, there was a strong 'pull', in the form of others' eagerness to experience similar development for themselves. As a result, 15 programmes have now run and a further 12 have been commissioned to run until February 2011, involving a total of over 300 Advisors.

The L&D budget of the National Trust, as a charity, is relatively small compared to many private sector organisations. The cost of the programme for Functional Advisors represents a significant part of that budget, and the fact that the programme is going through more iterations than originally envisaged demonstrates the success and positive impact that has resulted from the initial roll-out. It is already possible to see return on the investment in the programme to date (see Section 5).



3 The Learning and Development Initiative

The first residential module

In November 2008 the first cohort of 12 Functional Advisors came to Ashridge for a three-day programme. The learning environment at Ashridge is renowned. The tranquillity and beauty of the building and grounds, amidst acres of National Trust woodland, made the participants feel that this was “home from home” and assured them that Ashridge and its people experience first-hand and understand the often conflicting priorities of the demands of day-to-day operations and the longer term mission of preserving part of our heritage for future generations.



Participants were also to discover how tradition meets innovation in teaching and ideas, with Ashridge Consultants practising at the leading edge of their profession. There was nothing ‘cosy’ about participation in the programme. With only 12 participants, there was no ‘back row’ (no rows at all at Ashridge – class or lecture room ‘teaching’ is strictly out!), they sat in a circle as a way of fostering dialogue and everyone had to participate fully.

Not all participants were starting at the same level of readiness, but most soon began to appreciate that they were able to develop new skills and think differently. The programme was designed to help them meet their challenge, of moving from a tactical to a more strategic role, and from a transactional way of interaction to a more relational,



or inquiry-based dialogue with other members of the Trust. Rather than just being experts, they were being called upon to be collaborative and engage with other functions in a 'wider world view' within the Trust: no mean challenge, given the huge competition for resources across the many branches of the Trust's activity.

The design was informed by the Ashridge Consulting relational approach to consulting, emphasising the importance of awareness, relational contact, inquiry, conversation, experimentation and reflection. From the outset, the development programme design placed particular attention on fostering relationships and agreeing confidentiality to create a safe, supportive, fun, yet stretching learning experience. It was grounded in Functional Advisors' experience and the reality of their current context.

Pre-work was required prior to arrival. This included reflecting on and recognising their responses to a paper from the Director of Conservation. They completed a consulting styles questionnaire, requiring them to seek anonymous feedback from clients on how they were perceived and experienced. The programme started with an experiential process to help individuals get to know each other, their experience and the consulting capability already there to build on. The process that ensued over the three days developed this consulting capability further and was consolidated around key areas of structure, styles and skills, underpinned by attending to the here and now co-created consulting client relationship.

This L&D process offered pragmatic and relevant concepts or frameworks including: a relational consulting cycle, consulting roles, ways of building and engendering trust, consulting intervention styles, conflict styles, listening skills, inquiry skills, and an appreciative and development feedback structure. Functional Advisors were invited to participate in activities relevant to their context, to experience, reflect and make sense, with the purpose of encouraging learning from the 'here and now' being assimilated to the 'there and then' of their current client relationships and organisational activities.

A challenging and stretching part of this learning process occurred during the consulting skills practice on the second day. Functional Advisors worked as a consulting team with a General Manager (played by an experienced actor), observed other teams consulting and facilitated an appreciative and development feedback process to support each others' learning.

On the third day Functional Advisors were supported to integrate learning of self and self in relationship to their role, while considering what they could do differently to develop more effective client consulting relationships back in the National Trust.

Action Learning

Given the depth of change required and cultural shift away from traditionally transactional services to new ways of working in collaborative partnerships, the design needed to include longer term support for participants to practise, reflect and embed the learning with appropriate support and space. Following each programme, Action Learning sets were formed to support them in their ongoing learning in the face of day-to-day issues. These groups of six Functional Advisors met with an Ashridge facilitator for half a day, four times over a ten-month period, to support and challenge each other.



Here, they addressed their consulting issues and problems and shared the learning as they developed their capability as Consultants.

Blended Learning

Throughout the initiative, participants had access to the rich resources of the Ashridge Virtual Learning Resource Centre (VLRC), with its vast range of learning materials on all aspects of management, leadership, strategy and change, by Ashridge and world-renowned authors. Ashridge customised the National Trust's VLRC portal, mapping materials to the organisation's competency framework that sets out the behaviours for successful management and leadership required to achieve the Trust's goals. The framework is central to the recruitment and development of General Managers and Advisors across the Trust and is now a formal part of the annual performance and development review. Consulting capability and the need to create relationships of trust are critical to the leadership competencies. Another source of on-line learning support was the National Trust's own Headspace library. Both resources enable busy managers to access and continue learning when particular situations arise and without having to leave their work or home location.

Technology is also being deployed to enable around a quarter of the Action Learning sets to engage in Virtual Action Learning. Participants are discovering that contrary to popular assumption, Action Learning can be just as effective in a virtual environment and they are also experiencing and practising a different way of learning and working in the virtual space. The benefits of Virtual Action Learning are too many to list here. However, not only does this option mean that geography is no longer a barrier to the coming together of Action Learning sets, but it is also highly congruent with the National Trust's commitment and core values – to preserve the environment.



4 The Impact

The evaluation process

Ashridge Consulting engaged in an Evaluation Inquiry process underpinned by a rigorous, inquiry-based research approach using both quantitative and qualitative methods. Its purpose was to understand through evidence the impact of the Developing Internal Consulting Capability intervention on participant Advisors and their 'clients' – eg. General Managers, and on the wider organisation. In particular, effort was made to determine the effectiveness of the component parts of the programme. Attention was also paid to the organisational contexts which support successful client-consultant relationships, highlighting in particular the importance of effective leadership. The evaluation served both to monitor the effectiveness of the programme, and to provide Ashridge and the National Trust with qualitative and quantitative data to inform future interventions that facilitate the change process, while delivering value for money.

The evaluation process sought to collate 'stories' on what is working, how it is working and what is the impact – so that the ways of working and organisational aspects that support this change can be amplified.

Confidential online surveys were sent to 87 programme participants. The incredibly high response rate of 86% is indicative of the learning and value Advisors are attaining. Following the surveys, one-to-one telephone enquiries were held with six Advisors and ten clients. The responses will be shared with all participants and sponsors, and will inform and shape the organisation development and learning interventions in the Trust in 2010. (Visual of Evaluative Inquiry Process in Appendix 1).

The evaluation findings

Individual impact

It is clear from Advisors' comments that they are learning about themselves personally and professionally, and integrating learning into their roles and working environment.

'I believe this has enabled me to be a better person, more rounded, more patient with my thoughts, more effective in the new role I now occupy'

'In a long management career to date... can say without hesitation that it was the most intense and enjoyable course I attended'

Action Learning Groups *'were invaluable in ensuring that I did not go back and forget what I had learned from the course'* said one participant, and the learning environment was *'extremely useful in giving me permission ...to experiment,'* said another. One said he *'was inspired and provoked by the facilitator, and by my colleagues with whom I undertook the programme'.*



Impact on others

The Advisors themselves identified ways to amplify the change process: eg. some suggested that the Property Managers undergo similar training, with 'regular reinforcement and involving both clients and consultants as a matter of course.'

93% of Advisors have found ways to share their learning with colleagues and teams, by coaching, setting up workshops, developing their staff and networking. The communication promises to be a dynamic process, for the ongoing good of the Trust:

'It has been very helpful working with colleagues on projects that are not our day jobs... We have shared purpose and objectives and learn together, which creates feelings of bonding and kinsmanship. We develop greater rapport and are more likely to help each other out.'

Organisational impact

It is becoming clear that the Functional Advisors are indeed developing their internal consulting capability and stories are emerging about the good results of their effective working relationships with General Managers and the wider organisation, particularly in complex scenarios. For example:

'We worked with a curator on how to preserve a property as an asset. He was able to take into account our commercial imperative to accommodate visitors and generate income. He wanted to be helpful and had a flexible demeanour. He did not stick rigidly to the brief and was willing to temper the conservation ideal and generate a solution that took into account these other objectives. He saw the urgency of the project and gave good reasons for what he advised. He did what he said he would. He gave good, quick, robust advice and we had an easy working relationship with him. It made things easier for us and gave us confidence. As a result, we were able to be decisive, act more quickly and produce good compromise solutions.'

The programme is becoming aligned with wider learning and development processes, eg. informing the setting of objectives in the annual performance management review for Functional Advisors. The findings of the evaluation process are also informing the shape of future learning and development initiatives.

"To achieve the ambitions of our refreshed strategy, firmly underpinned by a new focus on fleetness of foot and improvements to efficiency, I am sponsoring an 'Innovation Group'. This will deliver an internal consultancy framework (model) in the first quarter of 2010 which will catalyse and support the current initiatives taking place on developing consulting capability. It will include codes of conduct for both clients (General / Property Managers) and consultants (Functional Advisors). The group will define any actions required to implement the model and any further development needs of both clients and consultants, and will identify a means of obtaining formalised client satisfaction feedback in a coordinated, consistent way."

Paul Boniface, Director of People and Governance



Business impact

Over the last few years, National Trust membership has grown (from 3.5m to 3.7m members), more volunteers are giving their support (from 48,000 to 55,000), visitor numbers are up from 14m to 15m and commercial income has increased by 10%. Given that the programme for Functional Advisors, though a key initiative, is but one part of the learning and development strategy, it is difficult to quantify the business improvements directly attributable to it. However, the evaluation feedback from participants and those who benefit from their services and expertise makes it clear that dynamic learning translated into action at individual and systemic levels is having direct impact on the Trust's ongoing success.



5 Reflections

Both Ashridge Consulting and the National Trust agree that the strong sense of partnership and trust throughout the tender, design, delivery, evaluation and planning for the future has been key to the programme's success. Jonathan Noall commented,

“A trusted partnership has developed which began when we first met at the tender invitation. Billy, Martyn and the facilitators at Ashridge lead by example in their consulting style. We have all worked hard to remain connected to wider business developments to ensure this cultural change programme is integral and supportive of organisational goals: a sure recipe for success!”

Ashridge Consulting has derived additional satisfaction from the creation of a dynamic learning environment that is being created by the participants back in the workplace. Priding themselves on enabling real transfer of skills, the programme directors are delighted that not just the participants, but the whole organisation is benefiting from the programme. Billy Desmond said,

“Emerging activities driven by participants such as mini-workshops and ways-of-working discussion forums have sprung up across the Trust in light of this intervention supporting the change agenda Trust-wide. As a co-dependant design team with the National Trust, our aim is to support and encourage these emerging activities and create an environment of shared learning and experimentation. Looking ahead, in 2010, our attention will shift toward leadership development as we help leaders create and foster the right climate for successful client-consulting relationships.”

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Appendix 1 Evaluative Inquiry Process

