Okay everybody. Thank you for joining us. I'd like

to introduce you to Gerry Hanley,

Kathy Fernandes, and Bridget Wikidal.

Today we're going to talk about making a

Campus-Wide Impact: Change Management.

Gerry, would you like to take it from here,

introduce yourself, Kathy, and Bridget?

Great. Thank you so much.

I really do appreciate the support of Verbit to

share some of the lessons that we've

learned in the California State University,

and wonderful experts with me here.

Kathy Fernandes, Academic Technology Officer

at Cal State, Chico, Northern California.

Down here in Southern California, Bridget Wikidal,

Senior Director of Project and

Change Management at the Chancellor's Office.

We really do appreciate the opportunity for us to

share some of the lessons that we've learned,

so you can, let's say,

acquire some of the skills that took

us a little while to learn and you could be

more successful in implementing

accessible technology on your campus.

Next slide. So the topics we're going to cover here is,

I'll start off with just an overview

about change management and how to think

about strategies as you're trying to improve

the applications of accessible technology as well as UDL.

Then Kathy is going to talk about

a lot of her excellent experience working with,

just give a shout-out to Scott Ready from

Verbit in the CSU and empowering people.

Then Bridget is going to talk about, from her experience,

working in the whole system of 23 campuses

in the IT department about some key recommendations.

Then obviously we'll open it up for

your questions throughout the process

here too if things pop up.

So the question that's guiding us here is,

how do you get your campus to change

its institutional habits so it can

adopt and sustain the use of technologies

that really will serve

all our students with equal effectiveness.

Given the pandemic of COVID,

you can also think about this whole process

of all our habits when we think about

what does it take for us to

change all these habits that we

have to new behaviors

that will really enable people to stay well.

So next slide.

These are just some of

the general processes if you want to think about,

the first step is you got to raise

awareness and relate it to their current habits.

So if we're talking about COVID, you can say,

"Okay folks, how do

you wash your hands on a regular basis?"

"How far are you from people on a regular basis?"

And begin to understand, when it comes

to working with accessibility,

how do you get people to understand

the impact of all the way that they are

delivering technology and instruction

on a whole variety of population of their students,

and that how some of those habits

are, in a sense, discriminatory

for those students with disabilities.

Then once you begin to raise awareness,

how do you get people to say,

"I want to change?"

How do you get them to have

a motivating mindset and say, "You know what?

We need to do something about it."

Without that motivation, it's very

hard for people to acquire new habits.

So that's often connecting

people to say, on the COVID side,

"Do you want to stay healthy?"

"Do you want your family to stay healthy?"

These are things that you have to

begin to motivate yourself for change.

Then the next step is around

educating and enabling actions.

Whether it's with COVID or with accessibility,

you have to provide people the support to make it

convenient for them to get what they want.

You build them up to say, "You know what?

We need to make our institution more accessible for

all our students and the instructional process

to be equally effective for their learning."

Once you have that motivation,

then what are the tools that you're going to enable them

to take that action to achieve that goal?

And that's where a lot of support really becomes

processes; as they're going through them, they say,

"Okay, I have these capabilities."

Now, as I'm learning those, as a user,

they're going to run into problems.

They're going to learn things that they didn't know.

They're going to realize these new habits are going to

have influence on other habits that they have.

So how do you have those support services?

Then once you work with them, engage them,

support them in an ongoing process,

and I'll just say this doesn't happen by

writing a memo from an executive saying,

"You will do this."

This process of building habits requires

a process of engaging people in

a continuous process where they get to practice,

where you build relationships and you provide support.

After you go through this process

and people have achieved these changes,

then you want to celebrate accomplishments.

It's really important to enforce those actions,

both as individuals and as institutions.

So when you're thinking about

a change management process,

you're thinking about this as a sequence of

services that can progress people

to changing the way they

institutionalize those habits and

supporting accessibility on a campus.

So those are the broad areas.

Next, I'll just quickly go through

when you're thinking about an institution.

There's so many stakeholders,

there's so many complexities.

So what can you do at whatever level you're at?

Well, understanding that there

are many different ways that you

have to prod and support an institutional change,

I put together this little pyramid.

The first step is aggregating assets.

Who are all the people?

What are all the tools that you actually

have available, and begin to organize them.

Higher education is often a very siloed institution.

So when you begin to see who in

your library might have support for students,

accessible support for students with disabilities,

or your center for students with disabilities,

or your academic technology,

or your faculty development center,

look at all the players,

and then how do you start building

bridges between those siloed groups?

Carry on those conversations,

build those trusted relationships,

and then you start bringing, okay,

now that we have an awareness and a group of

people who can bring their tools together,

how can they then do something about it?

So this is where technology can be very

useful in enabling people to work together,

and if you make it convenient and affordable,

you can then help them work together.

Now, once you provide the support services,

then you have to say, "Okay,

through training and communication,'' then they say,

"Yes, we can do this,

we can make this," and at the top, of course,

we have our policies and

our leadership who are also providing that support.

So whatever position that you're in,

you can have an influence on many of these layers, and you

can lead the change at

whatever layer you're at to help building bridges,

supporting capabilities, developing the demand,

and influencing policies, business models, and leaders.

So I'll stop there and pass it over to Kathy

who will give some wonderful examples of

her leadership here in

change management and accessibility.

Hey. Thanks, Gerry.

So I'm Kathy Fernandes,

Academic Technology Officer at Chico State.

Before, my previous position was working for Gerry in

the Chancellor's Office as Senior Director

of Learning Design and Technologies.

We actually, across the CSU 23 campuses,

worked to implement Blackboard Ally,

and if you go to the next slide.

Essentially, I'm going to tee off of

what Gerry said when he talked about, a lot of times,

based on movement within the organization,

people may spend a lot of time either writing up a policy

or writing up what

it is that they would like to see accomplished.

But as Gerry talked about in the pyramid there,

how do you get people to actually take

some ownership in building connections with each other?

I start out with clear communication and collaboration,

and that may seem obvious,

but I can't tell you how many times people

have expected change by basically just

sending a memo or just

telling a group of people you're on a committee.

What it really takes is a lot of

listening and sharing and asking people where they're at,

what they might intend the change to mean for them,

and really essentially get their head in

the game and allow them the opportunity to figure

out how to create with

the aggregating assets as

Gerry mentioned in the previous slide.

When we chose, in the California State University,

to site license, for all the CSUs, Blackboard Ally,

it took a couple meetings just to

get clear what the objective was,

what the context was.

But again, also multiple opportunities

to allow different people

to see it from different angles,

ask different questions, and start to build community

about what was this really all about.

We then worked with Blackboard and

the campus personnel in order to

coordinate bringing people onto campus,

and of course, that's not

possible today in the time of coronavirus,

but it was really important to make sure that

the right people were invited to the table.

In other words, a lot of people thought, "Oh,

this is just an implementation in the LMS;

I don't need to be concerned.

Great, go do that thing and

make your materials more inclusive."

Essentially, we had the event

and did a lot of invitations

around the campus leadership,

even in areas where maybe they were

tangentially involved or where they were a major player.

In bringing all of them together,

asked lots of questions and asked

them, essentially, to make a plan together,

if really I could sum up the day.

But the idea is in bringing different people;

some people hadn't seen the product,

some people knew about the product but

didn't think it had anything to do with them,

so then bringing in a perspective and a point of view of

how it could impact their workflow or their areas.

So really trying to connect a larger community

to see themselves in the picture and to

begin weaving themselves in sort of

a net with the others in the room

regarding ideas and how they expected to

move forward on a timeline,

on people's different roles,

on the impact they expected it to

have to start out with a pilot.

A lot of people think, "Okay,

I bought the software, it's available, go."

So really being able to chunk it out into pilots,

and how long do we expect as

far as growing the usage and

growing the experience and growing what it takes

to support this particular product over time,

again, creating that net

of people who are really important.

Essentially, also then providing some feedback,

meaning, again, it's another thing to say

we have a new product on campus, go get it,

go do it, go use it, but then,

how are you giving feedback,

not just to the community that is implementing it,

but to the entire community

in the sense of having, how far are we now?

Obviously, even in fundraising,

we tend to use those thermometers to

say, here's how far we are in the thermometer.

You need some of that data in order to

be able to give feedback so that, again,

people are brought in and paying

attention and wanting to see that movement rather than,

"Okay, it's implemented, I'm done."

So from here, I'm going to pass it

on to Bridget and let Bridget go from there.

Great. Hello everyone.

Thank you for the intro, Kathy and Gerry.

So my job at the Chancellor's Office,

for those of you who probably already know,

we have 23 universities in California State system,

and I work at the system office.

My job is to lead a team to work

on large system-wide projects, many technology projects,

but many in this day and age,

technology projects are at the hip

with business process projects,

so involving lots of people.

We also do a lot of projects at the Chancellor's Office.

We started a grassroots effort.

I want to say it started around 2013, because what I

was finding is that we were doing

a really good job of implementing technology,

but where we were really finding

the challenges was really with

the people part of those implementations,

and I stand by that today.

I think, for the most part,

we can do a really good job with technology.

But it's really that adoption

and usage of that technology solution

that's where the rubber meets the road.

And if we can get the people

who were implementing too to really adopt

and use and to let go

of the way they did things in

the past and really embrace

that future state and that solution,

that we're really meeting

the objectives of why we're doing

the deployment in the first place.

So with that said, I have a team of 12,

and we're focused on

those technology implementations. You can go ahead,

I'll move to the next slide, thank you.

So here's really the why.

Let me back up.

I think that when you're talking about projects,

and I think most of us work on projects,

and because my area is really focused

on making these projects successful,

looking at the practitioner end of project management,

meaning I'm interested in how, when we talk about change

management, interested in how do you do change

management? What are the things you do,

the activities, the work products?

Who are the people who do this work?

When I'm speaking this morning,

that's really where I'm coming from, is

that whole practitioner-end of change management.

So when I was looking to bring

change management into my area of influence,

because it very much was a grassroot effort,

I wanted something that was based on best practices,

something that was research-based, of course,

because we're in the academic industry

and that's very important to us.

What I was looking for is a common language.

There's lots and lots of tools out there for

both project management and change management,

and many of them are really accomplishing the same thing.

Can we settle on a set of common language,

a simple set of tools to start where we

can implement broadly so

that we're all speaking the same language?

Something that's easy to learn and to apply that

absolutely integrates with project management.

We wanted to build in

in-house expertise versus spending tons

and tons of money on outside expertise that

may vary from consultant group to consultant group,

because change is not going

away, and we thought that, strategically,

it would be a good idea to really try

to build that competency in-house,

because it's needed on everything

that we do especially in this day and age,

not just on projects.

Also, we wanted to make sure that it was something that

our higher ed community

would adapt to. Next slide, please.

So that was the why.

We ended up with moving towards the Prosci model.

Prosci is an international

research company on change management.

They do a benchmark study every two years to

all industries asking them about

the change management practices and then

they produce a volume of best practices,

and so they've been doing this for 20 years.

That's been a really good tool,

but they also do a lot of really

great training, and they have

a three-day practitioner training that I went to.

It met all of the things that I

personally was looking for as

a leader of my department. It was simple.

But I think that this particular triangle,

the Project Change Triangle,

really speaks volumes to me as far as

my experience and what makes a project successful.

You've got the three corners of the triangle.

You've got the Sponsorship/Leadership at the top,

which is critical to success,

Project Management and Change Management.

In the middle of the triangle,

you have what it is you're

trying to accomplish by the project,

your objectives and what

you're going to gain from this project.

So the idea here is that if any one of

these corners of the triangle is missing,

or not strong, or weaker than the others,

then your triangle is off-balance.

I think that just as a visual,

when I talk about change management

and I'm trying to explain to somebody what this means,

I talk about this triangle,

because I think that it really brings it home.

We need all three elements of the triangle

for project success. Next slide, please.

So Prosci uses an ADKAR model.

The ADKAR stands for,

as Gerry pointed out

when he opened our session this morning,

Awareness is the A,

of the need for change,

a Desire to support the change,

Knowledge of how to change,

Ability to demonstrate the skills

and behaviors for that change,

and then Reinforcement to make the change stick.

So the thought here in

this model is that individuals, when

they go through their current state

and they're transitioning to a current state,

they're going through that change,

they would go through these letters sequentially,

meaning, in order for you to get to desire to change,

you really have to have awareness first.

In order to get to knowledge of how to change,

you really have to have the desire to change.

So this model, very simple, but something

many people, no matter what

their level of exposure to change management,

they can understand this.

This applies both in

your personal life as well as your professional life.

So this is part of the model that we have

adopted, and it's been

quite successful. Next slide, please.

So these are some of the activities

that I was speaking of earlier.

When we talk about practitioners of

change management actually doing change management work,

what does that look like in terms of work output?

We call that deliverables in

the project management world.

What are some of those deliverables?

You can see here that there are many;

many you recognize, many you've seen them before,

but again, this is

all packaged together in a methodology.

The activities and the project plan for

a change management effort within a project,

all those activities are integrated

into the project plan.

So the change manager and

the change management activities are all integrated.

So really, everyone is

really involved in change management.

So I think that where we're at today

is we've made big strides,

we have created a system-wide,

meaning all 23 of

our universities and the Chancellor's Office

have a change team,

and we have a system-wide change network.

So we meet on a monthly basis and we

talk about the change management.

Twenty of our 23 campuses are

now practicing the Prosci model.

Again, we're making progress

towards that common language.

So it's been really incredible to be a part of this,

and now the campuses are using

these tools and models

on many different projects at their campuses,

and then that will grow at their campus level.

So that's what my experience has been.

I'll turn it back to you.

I'm sorry. Excuse me.

I have one more slide and I didn't even know it.

Bridget, we want to make sure we leave

some time for questions and stuff like that.

Yeah. I'll leave it there.

I think I've mentioned all these things.

Great.

Yeah. Exactly. So this

is time for questions from the audience.

There is a feature Q&A.

You can just drop

your question there or in the chat to all panelists.

Maybe while people are writing questions then,

I'll just make a comment here.

When Kathy talked about at the end that

data is so important about your progress,

that data is what you use

to celebrate your accomplishments.

That's the way to make

this connection, because then people can say,

"Look at what we've done.

We now have 30 people using it,

then we have 50 people using it," and

really recognizing that is

really important to take the time to do that.

Yes, totally. I agree.

Go ahead and write your questions in the Q&A feature

in the Zoom just below, or at the chat to everyone.

Give you guys just another minute or two.

Maybe while they're writing, Kathy,

do you want reflect on,

Bridget was talking about a methodology and how that

applied to academic technology

and the stuff that you've done.

Was that what you do?

It's funny, I have been trained in project management, but

it turns into a [inaudible 00:24:41]

What Bridget puts out there is the foundation,

and then as you actually work on a project,

it becomes the frosting on top of that structure,

meaning that it's fun to

reflect back after I see Bridget's stuff. Like,

"Yeah, that's why we did that.

Yeah, that's why we did that."

Not that we weren't somewhat intentional,

but when it becomes more innate versus something that you

see as stepping stones

or blocks of the things that you do,

so fun to reflect that way

to see how do you do those things.

There's different ways to approach that foundation.

Right.

Gerry, until we see more questions coming up,

why wouldn't you share with

us challenges that you're seeing around

or questions that you're

getting throughout the day-to-day.

Okay.

One or two popular. Yeah.

Yeah. Both Kathy and Bridget made

the important point of change management

is about people, and

technology can be a tool in the process, but it's

all about people. I'm a psychologist by training,

so I think the challenge is you

really are an organizational therapist.

You have to deal with people and

the challenge that often happens is people say,

"Well, I just need to do

my job and they need to do their job.

Why do I have to help them change

and change their habits

and change their minds?"

"Do I have to like

these other people that I have to work with?"

"Do we have to have fun?"

To do the change management process,

you have to be prepared to be a social change agent,

not just a individual change agent;

social distancing in the chain process

doesn't work very well.

You can't hold everyone at arm's length

if you want them to work with you side-by-side.

I think that's what Bridget and Kathy bring is,

I'll say when I've watched them,

is the leadership in the communication,

and this is a point that Kathy made early on, too,

is the listening in communication

is about building those relationships.

If you don't recognize that,

then implementing a project management process

will just turn out to be a nice document,

but you'll always be changing your schedule

because you can't get other people to cooperate.

So I have a question here.

It's coming up, sorry.

Is this a departmental program,

or college-wide, or leadership?

How do you become a change agent as a faculty member?

I'll start off, and Kathy and Bridget,

you've worked with folks too. And right now,

I'm a faculty member. It really is through, and

if you think about in a university,

the shared governance model

where you have within a department,

there is a role that you can play.

But as a faculty member,

there's often academic senate roles

where you're on committees for accessibility

or academic technology or whatever might that be.

You can have those roles of leadership

within a shared governance model and take advantage

of that, because shared governance is a process

of distributing power to multiple people, and

so leverage those roles.

I'll say the other thing is you

get the friends involved, right?

Makes it a lot more fun.

Next question, can we move,

Gerry, for the next question?

Sure. Yeah.

[inaudible 00:28:52].

More of a statement than a question.

COVID-19 has pushed change into the mainstream

as online learning is the requirement at this time.

It has been challenging for

students and staff as a transition progress.

The positive outcome is a recognition that

this tool is now a requirement for all learners.

This is, I think, more of a statement than a question.

Right.

I think with the COVID,

best change process has had to occur very quickly.

Yeah.

Kathy is going through it on her campus. I don't know.

Kathy, do you want to reflect on what you have

found to be essential for this process to work?

Well, I have to start with a joke first.

There's a survey out that says,

"Who caused the most digital transformation

on your campus?

The president or CEO,

the CIO, the CTO, or COVID?"

So we're all being forced into this vortex of change,

which as human beings, we frequently resist.

But also, as the Chinese symbol mentions,

it's also an opportunity.

We've all heard that before,

and really, it creates

opportunities to create if

people are willing to go there.

I know it's forced change, but in leveraging its,

and Gerry, I'm going to toss it back to you,

when it comes to neurosciences, yeah,

we're all being forced to learn,

which is changing our neuronal pathways

and changing what's happening in our brain.

I actually see it as a time of all kinds of innovation,

the spurring of innovation

based on the circumstances we're in.

Yeah. In the change management process,

awareness has been created,

every day in every newspaper,

in every journal article, you hear about it.

Desiring the demand for change is like,

I don't want to die,

I don't want my family to die,

I don't want my friends, so I'm motivated to change.

So the big effort now is in giving people the skills to

implement what they need to

do and the support when they have problems.

So in talking with people around the country,

this is really one of the essential aspects and some of

the challenges are people don't have time,

they don't have money,

and so how can we share with, I'll say,

open education resources for change or some of

the technology companies are offering

their services for free in various ways.

So people are taking a lot of steps to help implement it.

I think what we need to do to keep people motivated,

too, as well, and support, is

the recognition, the celebration of accomplishments.

When you see all the faculty who are now moving online

do things that they've never done before.

If we don't say,

in a sense, thank you, for what you've put into place,

I think we'll be losing that opportunity for

people to feel encouraged and

empowered by innovation rather than

"it's a burden," and

how do we make it really something that they

feel this is a gift for

them and for their students

to be able to continue their learning.

It's time to wrap it up.

Thank you so much, Gerry, Bridget,

and Kathy for your time and inspiration for this session.

So I thank you all for joining

us for this interesting session,

and we're moving to

the next session in just a few minutes.

So you are welcome to just go back to

the main page and just click

on the link for the next session.

Thank you very much. Thank you all.

Thank you, everyone.

Bye.

Bye.

[inaudible 00:33:02]