UNIVERSITY SYSTEM OF GEORGIA

USG Managed Services

Change Management Strategy

Project Document

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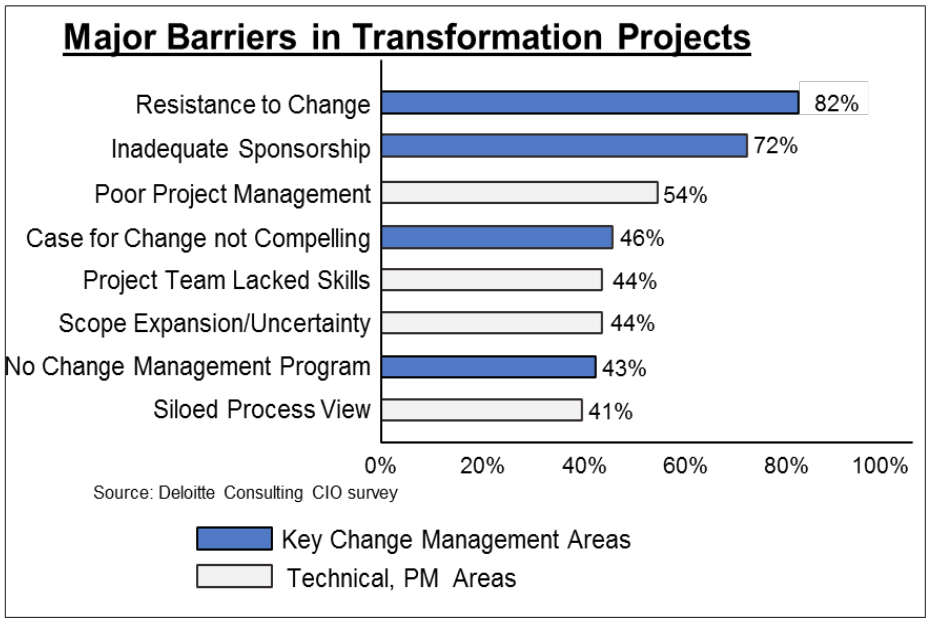
1 Change Management Overview

The USG Managed Services project is designed to move institutional Banner systems to the Georgia Best Managed Services solution, hosted by USG Information Technology Services (ITS). This managed services solution takes on the daily administration of key enterprise applications so that the institution can focus their IT resources on other strategic priorities. For institutions on Managed Services, ITS updates, upgrades, monitors and maintains their Banner systems.

There are currently 11 institutions using GeorgiaBest Managed Services. All remaining 15 schools will move their Banner instances to GeorgiaBest Managed Services via the USG Managed Services project through June 2021.

An effective and successful implementation of a new technology or altered processes in the higher education setting poses challenges to bring the people along the project adoption lifecycle.



The USG Managed Services Project Team recognizes the importance of having a Change Management Strategy to help its system stakeholders become aware of and successfully adjust to the changes that are coming with implementing Managed Services. This Change Management Strategy will assist system stakeholders to maximize expected benefits and mitigate inherent risks associated with this transition. Proactively managing change will:

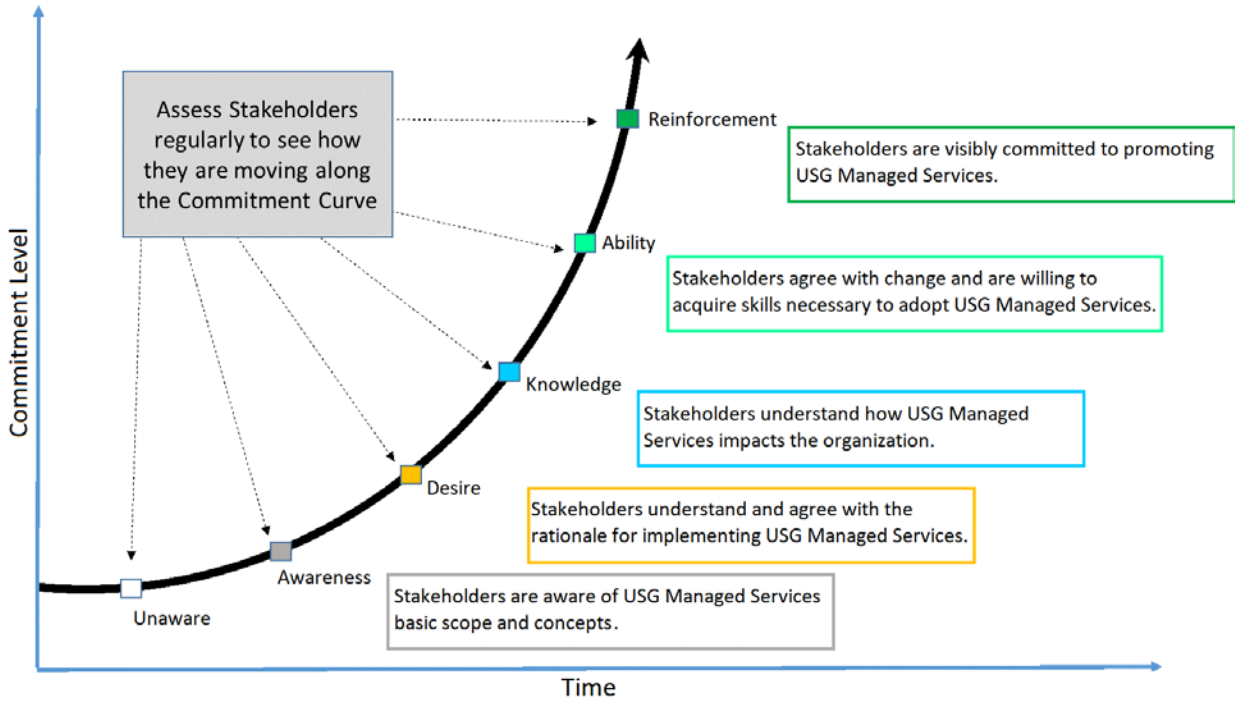
1. Reduce the depth and duration of the performance dip that naturally occurs after a system implementation.
2. Allow Managed Services to more rapidly achieve desired performance outcomes.

1.1 ADKAR Model of Change Management

Five building blocks will be used during the project to manage USG Managed Services stakeholder change readiness. These building blocks are the framework behind the Awareness, Desire, Knowledge, Ability, and Reinforcement (ADKAR) Change Management model. ADKAR is a goal-oriented change management model that will allow the institutional project teams to focus their activities leading to business results for USG Managed Services stakeholders. ADKAR is a foundational tool for understanding "how, why and when" to use different change management tools and techniques.

Building Blocks of Change	Anticipated Questions to be Asked by USG Managed Services Stakeholders	Anticipated Response from USG Managed Services Stakeholders
Awareness	**Awareness of the need for change** • *Why is the change happening?* • *Why is the change happening now?* • *What is the risk of not changing?*	"I think moving to USG Managed Services will help us stay current on software upgrades and enhancements."
Desire	**Desire to participate and support the change** • *What are the personal motivators and organizational drivers that would cause me to support the change?*	"I see how being on USG Managed Services can provide greater application security."
Knowledge	**Knowledge on how to change** • *What knowledge, skills and behaviors are required during and after the change is implemented?*	"I understand what I can do to support the project based on my role in the organization."
Ability	**Ability to implement required skills and behaviors** • *How do I demonstrate the ability to do my job the new way?* • *What barriers may inhibit me making the change?*	"I feel comfortable working with the application and I understand the impacts to my day-to-day job."
Reinforcement	**Reinforcement to sustain the change** • *What will make the change stick?* • *What are the rewards, recognition, incentives and consequences?*	"Celebrating each of the implementation phases is a good way to help strengthen support for the application."

The primary objective of the Change Management Strategy is to move individuals up the commitment curve and to prepare them for using the new platform through communication, training and engagement intervention activities. It should be noted not everyone will start at the same place, or end at the same place, depending on the anticipated project impact to their individual roles.



2 USG Managed Services Change Management Approach

This Change Management Strategy document is comprised of the following detailed strategies and plans outlining the impacted stakeholders, communication strategy and plan, and training approach. These actions contain detailed plans and approaches, which are addressed in separate sections later in the document.

Deliverable	Purpose	Result	Value
Stakeholder Assessment	• Identify specific stakeholder groups affected by USG Managed Services.	• Identifies distinct stakeholder groups and categorizes them by their level of impact and influence.	• Prioritize change management activities to ensure stakeholders are effectively engaged through communication and training according to their role.
Communication Strategy and Plan	• Provide strategic framework, guidelines, methods and tools to develop effective communications for USG Managed Services stakeholders. • Provide a comprehensive view of all communications that will be delivered throughout the USG Managed Services project.	• Outlines the primary and secondary methods of communication across USG Managed Services cohorts. • Customized plan by institution that outlines all planned communication events through Go-Live.	• Identify varying communication channels based on the system stakeholder needs. • Validate that messages are received and understood. • Provide a structured approach to plan, develop, execute, and track all messages to stakeholders. • Identify development and approval steps for the communication process. • Monitor the status and progress of all communications.
Training Approach	• Provide framework and guidelines to ensuring USG Managed Services project teams have ample opportunity to build skills and proficiency in order to complete project tasks.	• Provides training approach for institutional project teams to complete individual project plans.	• Provide a structured approach to execute institutional project plan.

2.1 Roles and Responsibilities

There are several categories of participants who will assume responsibility in relation to change management:

1. Institution Project Sponsors – Responsible for big picture perspective of why the project's objectives are important to the institution and the University System of Georgia. Ability to make decisions relative to the project's goals and objectives. Cognizant of the on-going programmatic resource implications.
2. Institutional Project Team – Composed of the institution team members as assigned by the Project Manager and critical stakeholders involved in the implementation of the project.
3. Institution Project Manager – Responsible for the overall progress of the project and monitors completion of all tasks and assignments in the project plan.
4. Institution Change Lead – Responsible for the overall communication at an institution. Responsible for tailoring communication to each stakeholder group as necessary.

3 Stakeholder Analysis

The Stakeholder Analysis is the starting point for the ITS Project Team and for institutions change management approach. This information is used to identify who needs to receive communication, how often they need to receive it, and how the communication will be delivered.

The USG Managed Services' stakeholder analysis is comprised of a Power Map (Appendix A) and Communication Plan (Appendix B).

Institutions should complete their own power map to identify stakeholder groups that identify the communication needs and methods for each group. Groups to consider when creating the power map include:

- Executive/Campus Leadership
- Functional Users – Staff
- Functional Users – Faculty
- Functional Users – Students
- Institution Project Team
- Other institution technical staff

Below is an example of an Institution Power Map:

Stakeholder Role	Name (or Listserv/email group)	Level of Engagement (Power Map position)
VP Academic Affairs	• John Doe	• Keep Informed
CIO	• Jane Doe	• Key Player
Functional Users: Faculty	• Faculty Email Group	• Focused Engagement

EXAMPLE

The level of engagement for each stakeholder role will be unique for each institution. Institutions can use the blank Power Map template in Appendix C for to capture their stakeholder groups.

4 Communication Strategy and Planning

The USG Managed Services Project Team at ITS has developed a communication plan for how and when we communicate with our identified stakeholders. This includes communications such as email updates on the project, biweekly cohort calls, and biweekly institutional calls. This communication plan is in Appendix B of this document.

The institution's Communication Strategy and Plan is used to capture the necessary information required to develop the detailed communication campaign. Use the Change Management Toolkit to develop your detailed/comprehensive strategy. This plan will be incorporated into your overall institutional project plan with action items and due dates.

It captures the following information:

- Audience – Who is the intended audience for the communications?
- Message/Activity – What are the key messages or activities to be delivered or accomplished?
- Vehicle/Tool for Delivery – What are the means to create, store and deliver the communications?
- Responsibilities – Who holds responsibilities for the creation, review, approval and delivery of the communications?
- Timing/Frequency – What is the delivery timing and/or frequency (weekly, monthly, etc.) required for each communication? What date or date period do you estimate delivering the communication?

Communications Guiding Principles

1. Tailor communication messages to your audiences.
2. Communicate in a "friendly" language.
3. Provide a single "access point" to information.
4. Leverage existing successful communication capabilities.
5. Communicate through different means whether in person or electronically.
6. Maintain honesty and integrity in all communications.

Develop Your Communication Plan (example below)

Audience	Message or Activity	Vehicle(s) for Delivery	Responsible	Delivery Date/ Frequency
Institution Project Leadership	Project Overview	Presentation	Project Manager & Change Lead	Early September
Functional Users: Staff	Request for Participation in Functional Testing	Email	Change Lead & Functional Lead	Week of September 24
Functional Users: Faculty, Staff and Students	Migration complete	Email	Change Lead	Go Live Date

EXAMPLE

Use Appendix D as a template for your institution's communication plan.

5 Training Approach

The USG Managed Services project will not result in any change in functionality for functional end users, including staff, faculty and students. Therefore, no functional end user training is being developed or provided for this particular project.

In order to assist institutional project teams complete their tasks, project training will be provided as needed. As part of the Change Management toolkit, reference materials for updating your project plan in Smartsheet, how the USG Managed Services project will be managed, and how to use communication templates are included.

This information is also to be provided during and after an institution's onboarding visit.

6 Change Management Toolkit

The USG Managed Services Change Management Toolkit contains communication and reference materials to assist institutions implement this project. This Toolkit is housed within each institution's project plan on Smartsheet.

USG Managed Services Change Management Toolkit Contents:

- Reference Documentation
  - USG Managed Services Project Management and Information
  - How to use Smartsheet to update your project plan
  - What happens after going live on USG Managed Services
- Communication Templates
  - USG Managed Services Project Overview
    - Templates designed for use in email messages, presentations, and awareness communications.
  - Coordination of Testing
    - Email templates for requesting testers (for functional testing)
  - Pre-Migration Preparation
    - Email templates how to prepare to go live on USG Managed Services
  - Pre-Migration Final Reminder
    - Email templates for any functional users to remind them of when changes can no longer be made in database
  - Post-Migration Announcement
    - Email template with new URL

Appendix A: USG Managed Services Project Power Map

Stakeholder Role	Name	Power Map Position	Why inform them	When to inform them
Chancellor	Steve Wrigley	Keep Informed	Senior Decision Authority	As needed
EVC & Chief Academic Officer	Tristan Denley	Keep Informed	Executive Sponsor	As needed
EVC Strategy and Fiscal Affairs	Shelley Nickel (Tracy Cook)	Keep Informed	Executive Sponsor	As needed
Deputy VC Academic Affairs	Martha Venn	Key Players	Business Owner	Bi-Weekly
VC & CIO	Bobby Laurine	Key Players	Business Owner	Bi-Weekly
VC Student Affairs	Joyce Jones	Keep Informed	Project Advisor	As needed
AVC Student Enrollment Services	Rich Loftus	Keep Informed	Project Advisor	As needed
AVC Student Enrollment Services	Tracy Ireland	Keep Informed	Project Advisor	As needed
VC Communications and Governmental Affairs	Charles Sutlive	Keep Informed	Project Advisor	As needed
Executive Budget Director	Jason Matt	Keep Informed	Project Advisor	As needed
Executive Director & CTO	John Scoville	Key Players	Project Leadership	Weekly
ITS Project Team	Various	Key Players	Project Completion/Management	On-going
ITS Staff (not on Project Team)	Various	Keep Informed	Awareness for integrations, resource scheduling, etc.	As needed
Institution VPAA	Various	Keep Informed	Primary points of contact/direction for institution	As needed
Institution CIOs	Various	Keep Informed	Primary points of contact/direction for institution	As needed
Institution CBOs	Various	Keep Informed	Primary points of contact/direction for institution	As needed
Institution VPEM	Various	Keep Informed	Primary points of contact/direction for institution	As needed

Stakeholder Role	Name	Power Map Position	Why inform them	When to inform them
Institution VPSA	Various	Keep Informed	Primary points of contact/direction for institution	As needed
Institutions: Project Manager	Various	Key Players	Project Completion/Management	Bi-Weekly
Institutions: Functional Lead	Various	Key Players	Project Completion/Management	Bi-Weekly
Institutions: Technical Lead	Various	Key Players	Project Completion/Management	Bi-Weekly
Institutions: Change Management Lead	Various	Key Players	Project Completion/Management	Bi-Weekly
Institutions: Functional Users (Staff, Faculty, Students)	Various	Focused Engagement	Awareness for functional use	As needed

Appendix B: USG Managed Services Communication Management Plan

Vehicle	Audience	Purpose	Frequency	Owner	Distribution	Level of detail
Academic Service Governance Meeting	USO System Leadership	Project progress and deliverable status	Bi-weekly	Executive Director - John Scoville	Meeting/ WebEx/ Skype	
Project Leadership Meeting	ITS Project Leadership	Project progress; deliverable status; proposed actions	Bi-weekly	ITS Project Manager	Meeting/ WebEx/ Skype	
Email Updates	ITS Project Leadership; ITS Project Team	Detailed project progress; reminders; upcoming events	As needed	ITS Project Team	Email	For internal project distribution
Webinars	ITS and Institutional Project Leadership and Project Teams; Other institution stakeholders	Project progress; important dates; actions required	As needed	ITS Project Team	WebEx/ Skype	Detailed for audience
Website: USG Managed Services	All audiences	Marketing/ Status tool for USG Managed Services Project	Weekly/ Monthly /As Needed (Depending on information)	ITS Change Management Lead	Website	High level status, rosters, decisions, updates, events
Emails to Cohort(s)	All institution project teams within a cohort	Share project progress, important dates, required actions	As needed	ITS Change Management Lead	MailChimp	
Biweekly Cohort Conference Calls	All institution project teams within a cohort	Share project progress, important dates, required actions	Bi-weekly	ITS Project Manager	WebEx/ Skype	
Biweekly Institution Conference Calls	Institution project teams	Share project progress, important dates, required actions	Bi-weekly	ITS Engagement Manager	WebEx/ Skype	

Appendix C: Institution Stakeholder Power Map Template

Institutions can use this template to create a stakeholder power map for their USG Managed Services project. By identifying stakeholders, institutions can build a communications plan to identify who needs to receive communication, how often they need to receive it, and how that communication will be delivered.

Stakeholder Role	Name	Power Map Position	Why inform them	When to inform them

Appendix D: Institution Communication Plan Template

Institutions can use this template to map out their communication plan for the USG Managed Services project. Institutions can use the templates from the USG Managed Services Change Management Toolkit to determine messaging and activities.

Audience	Message or Activity	Vehicle(s) for Delivery	Responsible	Delivery Date/ Frequency