Change Management Plan

MIT 530
Evaluation and Change in Instructional Development

Submitted by
Elizabeth Bailey

April 19, 2007

Table of Contents

Introduction

To keep competitive and meet the increasing needs of faculty and students, the University of North Carolina Wilmington (UNCW) initiated online course delivery with WebCT Campus Edition in Summer II, 2003, and set up a special Office of e-Learning to support online course delivery across the campus. The Office of e-Learning has two professionals dedicated to online learning and support for faculty teaching online courses.

A training needs assessment (TNA) was initiated when the staff in UNCW's Office of e-Learning expressed concern over being able to successfully meet all of the support demands of the online teaching faculty at the university. The purpose of the needs assessment was to determine how the Office of e-Learning, with their limited staff, could reverse the trend of being proactive rather than reactive with regard to anticipating faculty needs.

As a result of the TNA, it was decided that a combination of solutions should be used to help solve the Office of e-Learning's online support problem and improve their response to the faculty. Based on the results of data analyses, the needs assessment team recommended the following solutions, which are prioritized taking into account the factors of limited staff members in the Office of e-Learning.

1. Provide proactive outreach to faculty through emailed news bulletins regarding tips and facts for using Vista. This solution will answer questions before they are needed while creating a more comfortable environment for the faculty to switch to Vista and dispelling the fears the faculty may have in entrusting their material to the Vista system. (For instance, provide instructions up front on how to back up a course or that the Office of e-Learning can help faculty migrate to the new system.)
2. Ensure Help menu is a comprehensive solution as a one-stop-shop for help since it is by far the most popular spot for faculty to get timely help within Vista.
3. Provide periodic workshops and/or brown bag luncheons for faculty to learn the functions within Vista and to share their own experiences with their colleagues. Example topics could focus on technical difficulties, migration issues, and multimedia options.

After reviewing the needs assessment team's recommendations, the staff within the Office of e-Learning decided that the solutions were worth pursuing. In order to put the solutions into place, the following Change Management Plan was created. The plan describes the steps that will be used to make the changes, as well as to gain client acceptance and adoption. The plan also includes the one-year timeline for successful implementation of the change.

Summary of the change proposal

During the first phase of the change – months one through three – the Office of e-Learning will begin sending emailed news bulletins regarding tips and facts for using Vista to the UNCW faculty as a form of online teaching support. During the second phase – months four through six – the Office of e-Learning will provide a more robust Help menu within Vista for the faculty to use as a one-stop-shop for their online teaching support needs. During the third and final phase – months seven through nine – the Office of e-Learning will begin holding periodic workshops and brown bag luncheons for faculty to learn the functions within Vista and to share their own experiences with their colleagues (Appendix A).

Identification of stakeholders

A number of people and groups were identified as stakeholders during the change process, therefore having an impact on its success (Appendix B). They consist of the staff in the Office of e-Learning, Client Services, any faculty teaching online courses, and administrators who control the budget, staffing, and other decision making positions. The Office of e-Learning staff members are important stakeholders because their job is to ensure that the training and technical assistance needs of online teaching faculty are met. Client Services is a major stakeholder because e-Learning is a part of their department. If e-Learning is unable to successfully deliver sufficient training or assistance to faculty, Client Services will need to know and understand why, and ultimately is responsible for finding solutions. The online teaching faculty members are the primary clients of the Office of e-Learning. Faculty is dependent on e-Learning for proper training and technical assistance.

The key people and groups are broken down as follows:
- Chancellor – A formal authority and a vital person to have on the side of the change management team. He is receptive to the proposed changes and can provide resources to ensure the changes actually occur.
- UNCW Client Services – Can provide leadership, resources, and can change the existing system.
- MIT Student – Can bring about change systematically, but also can be seen as an outside system.
- UNCW Office of e-Learning – Can provide resources and act as a conduit between the MIT student and the university.
- Faculty – The faculty can be divided into four different groups: Change agents, transformers, unwilling laggards, and mainstreamers.

Forces for and against the innovation

During the training needs assessment, several factors were identified which could have a positive or negative influence on the plan (Appendix C). In the survey instrument which was delivered to the online teaching faculty, an open-ended question was given asking for areas in Vista where faculty needs support. Two of the comments received were positive and expressed appreciation for the outreach they have experienced from the Office of e-Learning, as well as for Vista being a vast improvement over Blackboard. One of the comments indicated technical difficulties with having to log in and out each time the respondent uploads something. The remainder of the comments were complaints of migration issues, one not liking that the Vista system can go down without having a way to back up the course, one needing Vista to be faster and more Mac-friendly with multi-media formats, and one regarding Vista being so time consuming and difficult that he or she abandoned Visa altogether.

The training needs assessment team also found that faculty feels it is easier to make a phone call than to look up information; faculty sees Vista as time consuming and difficult; faculty has already created classes for Blackboard and is reluctant to migrate to Vista; faculty who has experienced problems within Vista do not trust it; and, faculty is unfamiliar with many enhancements and features within Vista which makes online teaching easier.

Fortunately, the TNA team also found that faculty seeks ways of making life easier; faculty appreciates additional support; faculty who is already using Vista tend to be self-sufficient; faculty who is not yet using Vista will see news bulletins and see proactive support; Client Services is in favor of the innovations; and, Office of e-Learning staff is ready and willing to implement the innovations.

The forces for the innovations will have a large impact on the innovations' success, and the forces against the innovations will be able to be offset by a sound plan utilizing key people in key roles. As stated in the section above and in Appendix B, the Chancellor, Client Services, Office of e-Learning, and key faculty members will be put into place to ensure the negative forces will not have too negative of an impact on the success of the plan.

The change management team

A change management team will be put into place at the beginning of the change process. The members of the team will share a common commitment to seeing success in UNCW's online teaching community, for they know that, with its convenience and popularity among learners, online learning has become a new avenue for course delivery and the new arena for higher educational institutions to compete for students' enrollment and course participation.

The main purpose of the team will be to discover whether the change plan will fulfill the needs of the online teaching faculty and work as expected via a pilot test. The team will be a resource to other faculty and will work to see the success of the plan via leading other faculty to becoming on board with the change. The team will also provide extremely valuable insight into how other faculty members feel about the change. Likewise, the change management team will also periodically evaluate the plan in order to take the temperature of the appropriateness and future effectiveness of the change.

The change management team will be formed at the end of the current Spring 2007 semester and will meet periodically during the summer so that the plan may be put into place as quickly as possible. The members of the team will include:

- The Chancellor
- Client Services
- Office of e-Learning staff members
- Four faculty members who are leaders in using Vista
- MIT student

The main role of the Chancellor on the change management team will be the commitment of leadership, resources, and funding for incentives. Without the Chancellor's commitment to the project, the plan will not be a success. Fortunately, the plan will not take extra staffing, so funding is minimal with it mainly going toward small incentives for faculty who buy into the change. Likewise, with the Chancellor sending out emails to garner attention for the innovations, the change will gain credibility and the faculty will be more likely to take it seriously.
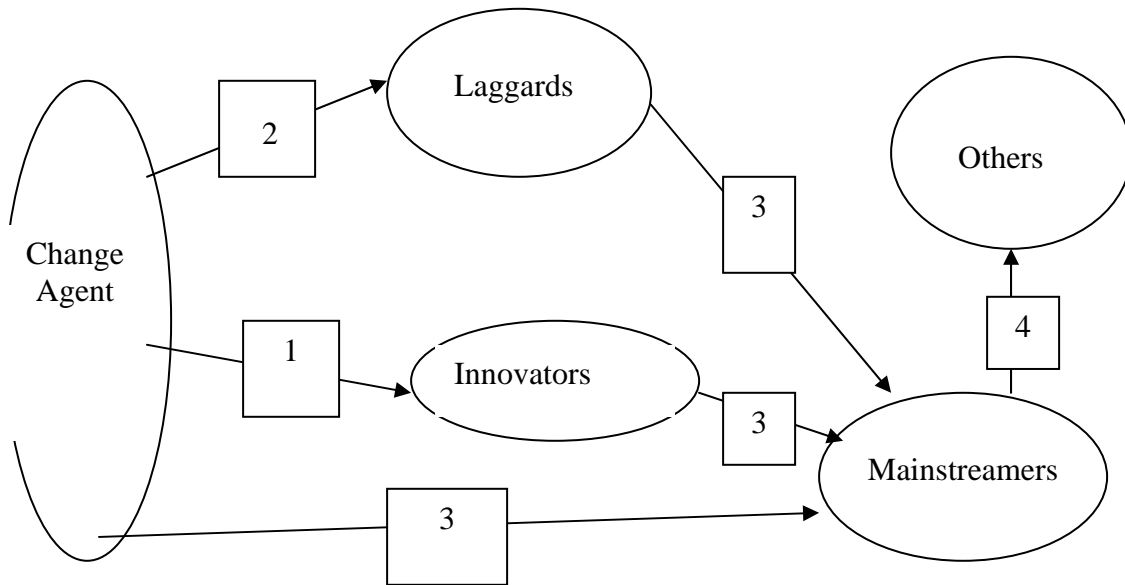
Client Services and the Office of e-Learning will be heavily involved in the change management plan because the entirety of the plan originated from their organization. The Office of e-Learning has the most at stake with regard to the plan, so its two staff members will be the main pioneers who carry out the majority of the plan's efforts.

The MIT student will be involved with the team on a project management type basis. The student will ensure all parties are kept on track and are on the same page during the carrying out and implementation of the plan.

The four faculty members (Faculty Group A) who are leaders in using Vista will be key in ensuring the success of the plan. The Faculty Group A will be instrumental in the

6

stepping stones of bringing other faculty on board with the change and will serve as innovators/opinion leaders in nudging the mainstreamers and laggards in the right direction.

If the change management team agrees, the stepping stone nature of the plan may be carried out in the following way:

```
                    ┌──────────┐
                   (  Laggards  )
      ┌───┐        └──────────┘              ┌────────┐
      │ 2 │                                 (  Others  )
      └───┘              ┌───┐              └────────┘
                         │ 3 │
 Change                  └───┘             ┌───┐
  Agent                                    │ 4 │
      ┌───┐                                └───┘
      │ 1 │    ( Innovators )   ┌───┐
      └───┘                     │ 3 │   ┌──────────────┐
                               └───┘   ( Mainstreamers )
           ┌───┐                       └──────────────┘
           │ 3 │
           └───┘
```

Timeline

The change management plan will be carried out in three phases, each of which consisting of three months (Appendix C).

Phase 1
Months 1-3
May – July 2007
Strategy: Faculty will use emailed news bulletins regarding tips and facts for using Vista as a form of online teaching support.
Awareness: Change management team formed; Chancellor informs faculty of plan.
Interest: Notification of upcoming support mechanisms; notification of incentives.
Evaluation: Review of faculty's online classes; discussion with other faculty.
Trial: Faculty Group A begins using emailed news bulletins and makes suggestions for improvement.
Adoption: Improvements implemented into emailed news bulletins.
Integration: Emailed news bulletins distributed to faculty at large.

During Phase 1 of the change management plan, the goal is for faculty to begin using emailed news bulletins regarding tips and facts for using Vista as a form of online teaching support. Within this phase, the change management team will be formed, and the Chancellor will be on board by informing the faculty of the plan. Interest will be generated through notification via email of the upcoming support mechanisms and incentives for using them. Evaluation will be set forth by reviewing the faculty's online classes and through discussion with other faculty. Faculty Group A will pilot the news bulletins and make suggestions for improvement. After improvements are implemented into the news bulletins, they will be distributed to the faculty at large.

Phase 2
Months 4-6
August-October 2007
Strategy: Faculty will continue to use emailed news bulletins but will also use the Help menu as a one-stop-shop for help within Vista.
Awareness: Chancellor informs faculty of plan.
Interest: Some interest generated by previous months' plan; notification of upcoming support mechanisms; notification of incentives.
Evaluation: Review of faculty's online classes; discussion with other faculty.
Trial: Faculty Group A begins using Help menu and makes suggestions for improvement.
Adoption: Improvements implemented into Help menu.
Integration: Improved Help menu available to faculty at large.

During Phase 2 of the change management plan, the goal is for faculty to continue to use the emailed news bulletins and to also begin to use the Help menu as a one-stop-shop for help within Vista. Within this phase, the Chancellor will be on board by informing the faculty of the plan. Some interest will be generated by the previous months' plan, and also through notification via email of the upcoming support mechanisms and incentives

for using them. Evaluation will be set forth by reviewing the faculty's online classes and through discussion with other faculty. Faculty Group A will pilot the Help menu and make suggestions for improvement. After improvements are implemented into the Help menu, it will be distributed to the faculty at large.

Phase 3
Month 7-9
January-March 2008
Strategy: Faculty will continue to use emailed news bulletins and Help menu but will also use periodic workshops and/or brown bag luncheons to learn the functions within Vista and to share their own experiences with their colleagues.
Awareness: Chancellor informs faculty of plan.
Interest: Some interest generated by previous months' plan; notification of upcoming support mechanisms; notification of incentives.
Evaluation: Review of faculty's online classes; discussion with other faculty.
Trial: Faculty Group A begins attending workshops / brown bags and makes suggestions for improvement.
Adoption: Improvements implemented into workshops / brown bags.
Integration: Improved workshops / brown bags available to faculty at large.

During Phase 3 of the change management plan, the goal is for faculty to continue to use the emailed news bulletins and the Help menu, and also begin to use periodic workshops and/or brown bag luncheons to learn the functions within Vista and to share their own experiences with their colleagues. Within this phase, the Chancellor will be on board by informing the faculty of the plan. Some interest will be generated by the previous months' plan, and also through notification via email of the upcoming support mechanisms and incentives for using them. Evaluation will be set forth by reviewing the faculty's online classes and through discussion with other faculty. Faculty Group A will pilot the workshops / brown bags and make suggestions for improvement. After improvements are implemented into the workshops / brown bags, they will be made available to the faculty at large.

Pros and cons

The change management plan which has been outlined in this document is extremely feasible and appears to have a quite positive outcome if all of the resources are put into place. It allows for the faculty to have more and consistent opportunities for online teaching support, and likewise it allows the Office of e-Learning to proactively meet the faculty's needs rather than remain in a constant state of reaction. Likewise, the plan addresses the six phases for adoption of innovation: Awareness, interest, evaluation, trial, adoption, and integration.

Once all three of the phases of the plan are in place, the faculty already using Vista will have a more positive outlook on teaching online, and their attitudes and beliefs will begin to bring more of the faculty into the online teaching fold. With the numbers of faculty

teaching online surely growing through the positive reactions from the faculty already using the new support measures, the Office of e-Learning will already be a step ahead with their proactive approaches in place, and they will be able to handle the growing numbers.

Appendix A

<u>Stages</u>

Stage 0 – UNCW's Office of e-Learning expresses concern over being able to successfully meet all of the support demands of the online teaching faculty at the university.
Stage 1 – Establish who/what is in the system and what role do they play; build relationship with client.
Stage 2 – Define the problem (TNA).
Stage 3 – Determine the resources that are available (money, people, time, space, etc.) to help solve the problem; determine who or what may act as a constraint.
Stage 4 – Choose feasible solutions; pilot test.
Stage 5 – Implement the solutions.
Stage 6 – Evaluate and revise.

Current performance conditions: UNCW's Office of e-Learning's small staff is reactive rather than proactive with the online teaching faculty.
Desired performance conditions: Alternative training/support for the online teaching faculty is in place so that UNCW's Office of e-Learning staff may better anticipate faculty needs and be proactive rather than reactive.

Goals	Indicators	Benchmarks	Measures
Months 1-3: Faculty will use emailed news bulletins regarding tips and facts for using Vista as a form of online teaching support.	Faculty will increase their use of emailed news bulletins as a form of online teaching support.	Faculty will make fewer calls to the Office of e-Learning for online teaching support.	Call logs, remedy tickets
Months 4-6: Faculty will use the Help menu as a one-stop-shop for help within Vista.	Faculty will increase their use of the Help menu for help within Vista.	Faculty will make fewer calls to the Office of e-Learning for online teaching support.	Call logs, remedy tickets
Months 7-9: Faculty will use periodic workshops and/or brown bag luncheons to learn the functions within Vista and to share their own experiences with their colleagues.	Faculty will increase their use of workshops/brown bag luncheons.	Workshop/brown bag luncheon attendance will increase and faculty will make fewer calls to the Office of e-Learning for online teaching support.	Workshop/brown bag luncheon attendance, call logs, remedy tickets

Appendix B

Identification of key people and stepping stone strategies			
Names	**Role in innovation**	**Resources/constraints**	**Stepping stone strategies**
Chancellor	Transformer	*Resource* – can provide leadership; can provide resources; can provide funding for rewards.	
UNCW Client Services	Transformer	*Resource* – can provide leadership; can provide resources; can alter existing system	
MIT Student	Change Agent	*Resource* – can bring about change systematically *Constraint* – seen as outside system	
UNCW Office of e-Learning	Change Agent	*Resource* – can provide needed resources and act as a conduit between MIT student and university	
Faculty Group A	Change Agents and Transformers	*Resource* – already use Vista easily and view it as a positive innovation. Others view them positively from being successful with the online tool.	Stone 1 – Introduce the innovations to this group and get them to pilot, evaluate, and adopt.
Faculty Group B	Transformers	*Resource* – willing participants who have influence over others.	Stone 2 – Have Faculty Group A introduce the innovations to this group and sound out potential resistance; leaders publicly commit to change and influence the mainstreamers.
Faculty Group C	Unwilling Laggards	*Constraint* – unwilling to change behavior.	Stone 3 – This group will be led into accepting the innovations by Faculty Group A.
Faculty Group D	Mainstreamers	*Resource/Constraint* – "noisy majority"; will change when other mainstreamers change.	Stone 4 – This group will be infiltrated by Faculty Groups A and B.

Appendix C

Identification of common things in the organization			
Forces favoring innovation	**Forces against innovation**	**Importance to system and people**	**Ease of alteration**
		Scale = 1-10, where 10 is important/easy	
	Faculty feels it is easier to make a phone call than to look up information.	10	2
Faculty seeks ways of making life easier.		10	6
Faculty appreciates additional support.		10	6
Client Services is in favor of the innovations.		10	5
Office of e-Learning staff is ready and willing to implement the innovations.		10	3
Faculty who is already using Vista tends to be self-sufficient.		10	7
Faculty who is not yet using Vista will see news bulletins and see proactive support.		10	8
	Faculty sees Vista as time consuming and difficult.	10	1
	Faculty has already created classes for Blackboard and is reluctant to migrate to Vista.	10	3
	Faculty who has experienced problems within Vista does not trust it.	10	2
	Faculty is unfamiliar with many enhancements and features within Vista which makes online teaching easier.	10	8

Appendix D

Strategies for each adoption phase						
Strategies	**Awareness**	**Interest**	**Evaluation**	**Trial**	**Adoption**	**Integration**
Months 1-3, May-July 2007						
Faculty will use emailed news bulletins regarding tips and facts for using Vista as a form of online teaching support.	Change Management Team formed; Chancellor informs faculty of plan.	Notification of upcoming support mechanisms; notification of incentives.	Review of faculty's online classes; discussion with other faculty.	Faculty Group A begins using emailed news bulletins and makes suggestions for improvement.	Improvements implemented into emailed news bulletins.	Emailed news bulletins distributed to faculty at large.
Months 4-6, August-October 2007						
Faculty will continue to use emailed news bulletins but will also use the Help menu as a one-stop-shop for help within Vista.	Chancellor informs faculty of plan.	Some interest generated by previous months' plan; notification of upcoming support mechanisms; notification of incentives.	Review of faculty's online classes; discussion with other faculty.	Faculty Group A begins using Help menu and makes suggestions for improvement.	Improvements implemented into Help menu.	Improved Help menu available to faculty at large.
Months 7-9, January-March 2008						
Faculty will continue to use emailed news bulletins and Help menu but also will use workshops and/or brown bag luncheons to learn the functions within Vista and to share their own experiences with their colleagues.	Chancellor informs faculty of plan.	Some interest generated by previous months' plan; notification of upcoming support mechanisms; notification of incentives.	Review of faculty's online classes; discussion with other faculty.	Faculty Group A begins attending workshops / brown bags and makes suggestions for improvement.	Improvements implemented into workshops / brown bags.	Improved workshops / brown bags available to faculty at large.