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Advance CAMP Fri. Sept 22, 2023

Room - V

Session Title: Rollouts that require behavioral change across the institution

CONVENER: Scott Woods

MAIN SCRIBE(S): Scott Woods, Summer Scanlan

ADDITIONAL CONTRIBUTORS: Marta Lang, Natalie Simonson

of ATTENDEES: 26

DISCUSSION:

Notes from Scott

Marta's story: They were working on a large modernization effort, and there was a different group that had an expectation of re-implementing the workflows and data sharing to work the same way that they did on the old mainframe (as opposed to leveraging the benefits of a new cloud-based system). Marta had to help them through the behavioral transition to the modern way of doing things. These are not just technology shifts—they're paradigm struggles.

[We then performed an exercise where participants categorized the common problems that they were seeing, in order to prompt discussion and find alignment]:



Many of these issues can be categorized more broadly as issues of good governance. (See also Erin Murtha's survey of IT governance best practices at Community Exchange 2023).

Sometimes "governance" takes the form of an authority setting a deadline and forcing it. That extrinsic motivation can be an important forcing factor.

Someone provided the story where they put a banner at the top of the Shibboleth login page to let people proactively opt in to the new system before the deadline, and that worked really well. They became aware of the issue, the pending deadline, and had a link to take action.

Keep in mind the trickle down effect to an end user, and how that feels—"I got a notice that I wouldn't be able to access my account unless I did this thing. But I had no other context." Good governance means everyone can understand it.

Good communication is underestimated. One person celebrated their really good communication person for their campus.

[*Designing Data Governance From the Ground Up by Lauren Maffeo*](#) is a great little cookbook for what good IT governance can look like. It's data centric, but it's not hard to translate it to any shared IT resource scenario.

One school established a dedicated Change Management Role. It's an alternative to just using "the stick", Change Management also brings "the carrot." It can be collaborative to have the people join the new campaign.

The 80:20 rule: 80% of the people go with the new change, but 20% are going to want something special, and can't go with the other 80%. And then 80% of your effort goes into serving the 20%! How do you get the 20% people to let go and go with the 80% for the good of the whole? It's super individual. Deep empathy and crafting the personal "why" for each individual. That's why so much effort goes into helping those 20%.

This pattern repeats and repeats. You'll never get totally on top of it. But it really helps if you can get the 80% talking to the 20% to champion it. That means more than when it comes from management/leadership. Use peer advocacy.

The role of "the stick" is sometimes someone higher up saying, "no, you can't run your own AD domain any more. It must be gone by this date." That kind of authority is sometimes necessary for certain types of situations.

Money is often the be-all and end-all for decision making, for better or for worse.

A bigger element of change that we need to deal with is emotion. Understand where they're coming from, and meet them on their terms. Pointing to the date on the whiteboard isn't going to change how they *feel* about it. Their emotions are valid (even if their reasoning doesn't work for the rest of the institution), and you have to work with them.

Sonia Alvarez-Robinson heads up a whole wing on Change Management at Georgia Tech. She says, “it’s not that people don’t like change—they don’t like *loss*.” So they often approach change like grief—e.g. when a group had to lose their office space. It gave them the chance to grieve, and then move on from there.

There’s a difference between Input and Feedback. It depends on whether the decision has already been made. Leadership needs to be more transparent when they just had to make a decision without input. Otherwise it’s “faux input.” Complicating matters, it aggravates people when all the ins and outs weren’t explained to their satisfaction.

When working with people on change to a more modern technology, one participant explains that he’s giving someone marketable skills, because the change often involves learning to use the new technology. “This is a new skill that you can take forward.”

Replacement of Nagios—a legacy system. Got them involved in the configuration of the new system, so they were so invested they became champions of the new system. Sure, there was concern of “too many cooks in the kitchen”, or what the new collaborators might bring, but fear of the collaboration was less than fear of the rejection of the new system.

Sometimes certain individuals are just difficult around change in general. One participant school tries to avoid hiring those people in the first place—they screen with the interview question of “tell me about a time you had to implement a policy decision or procedure that you personally disagree with? How would/did you deal with that?” If they don’t answer it well, it’s a big red flag.

Consider doing smaller groups for discussion and training, to get better two-way interaction. It also avoids a sense of a mass revolt when meeting with a big group all at once, if it were to go over poorly.

Over-communicate, because even though you’re in the thick of it, there will always be people for whom it feels like an information vacuum.

Make sure people feel heard, and also make sure it’s written down.

Erica Lomax’s example at Portland State University — MFA rollout across the whole organization, and they only had a couple support requests. Total success. They had people talking in the cafeteria line, handing out cards months ahead of time and providing support in the cafeteria line. Just a massive amount of effort and person-hours and one-on-one interaction for months and months ahead of time. But it shows just what it takes to make a massive behavioral change like that actually work smoothly. We all tend to underestimate how much work it will actually take. You can pay now, or you can pay later!

Work through the organization piece by piece. Start with president, then vp, then deans, then on down the organization bit by bit. Helps when you can do the rollout incrementally.

Use humor. When explaining why unique passwords are important, one campaign used: “Oh no, a hacker stole my password and now I need to rename my dog!”

Know the job of the two people above you, and learn to talk their language.

Case studies can be important for C level people.

Book recommendation: [Our Iceberg Is Melting by John Kotter](#) talks about change management.

Book recommendation: [Who Moved My Cheese? by Spencer Johnson](#) is a classic on the subject.

[The LUMA institute](#) provides training in human-centric design techniques, which can be fantastic for collaboration and buy-in.

Edward De Bono - [The 6 Thinking Hats](#). Useful when people are talking past each other about different types of concerns. Help to separate and hear all the different voices and viewpoints.

[Society for College and University Planning - SCUP](#). Apryl does a twice/year report that you can buy from them.

Final board:



SUPERSTICKY EASEL PAD
TABLEAU À FEUILLES MOBILES SUPERCOLLANTES
SUPERADHESIVAS BLOC DE HOJAS REPOSICIONABLES

DA-LITE



30

25 IN/PO x 30 IN/PO
63,5 cm x 76,2 cm
5,2 SQ FT/PI² (0,48 m²)

3M

Designing Data Governance from the Ground Up.

- Lauren Maffeo

Our Iceberg is Melting

- John Kotter

6 Thinking Hats

Undefined
requirements
and not understand
the new
system
Jeffrey

The cross
product
of behavioral
(personal) and
policy (institutional)

FEAR OF
NOT KNOWING
THE "NEW"
ENOUGH

Leadership
buy in
across different
groups/ departments

Organizational
Change
Management

Intersection of technology practices
business value (otherwise it isn't bought)
along with policy discussion +
analysis so that different can be defined.
Then use cases + requirements can
be defined + then finally new technology
can be found + implemented.
The above involves meeting of stakeholders + budgets

The unknown layers
of the DSI model:
Layer 8: Money
Layer 9: Politics

Is this a Budget Problem?
Core or a Standalone Solution
Costs x Dollars, Edges
Case or Hybrid Model ^{costs} x ^{edges}

Answering the question
"Why did this take the new
way when the old way
worked just fine?"

People do not like
change.
+ getting buy-in
from community is
essential + difficult

Involvement in the
process helps to
"sugar-coat" change.

Governance, especially around
innovation

There's a
problem with
getting people
on board with
changes they
don't have a
say/aren't
consulted in

Notes from Summer

Getting buy in is essential.

Communications are important - having a dedicated comms person who knows what they are doing is valuable.

Where do you go to learn good governance? Pragmatic Programmers

Established change management role to work with offices and explain why this change is important.

Do it or else is only partially effective - get them on our side of the change.

Don't be a jerk! Want collaboration. Get folks to join on the campaign.

How do we get people to let go of the 20% (80/20) – super individual. Have to give users the PERSONAL why.

Inconvenience now will lead to better experience continuously down the road.

Someone high up has to make a call and be decisive. Sometimes budgets/security risks are a case for change.

Must deal with emotion at some level - approach with empathy, explain it in their terms.

Emotions are valid even if logic is not.

Georgia Tech has a dept that deals with change management. People don't like change, they don't like loss. Approach as grief; folks can grieve and move on.

Difference between input and feedback. Decision has been made - ask for feedback. People can misunderstand and think they are giving input.

Replacing monitoring system- got folks involved at the beginning, taught them how to do cool new things, they became champions of the new tool. If users are given a stake in the change, they are more likely to embrace it.

Make sure that people feel heard and that is documented where they can see it.

Implementing MFA: Put 80% of effort into getting the word out - talked to every person multiple times, face to face, ie lunch lines. Worked really well, was a huge effort.

You can't make me use my personal phone! – ok, buy yubikeys

Hard to effect change at C-level. Figure out what is important to them.

Interview folks. Find out problems and procedures. If they have input they feel like they are heard.

ARTIFACTS / LINKS

- [*Designing Data Governance From the Ground Up* by Lauren Maffeo](#) is a great little cookbook for what good IT governance can look like. It's data centric, but it's not hard to translate it to any shared IT resource scenario.
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