UNIVERSITY OF VIRGINIA

Industry: Higher Education

UVA Elevates Project Portfolio
Management with Change Management

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> **Mary Brackett, Senior Associate, Organizational Excellence,
> University of Virginia**

Background

Founded in 1819 by Thomas Jefferson, the University of Virginia (UVA) is an iconic public institution of higher education, with nationally ranked schools and programs, distinguished faculty, a major academic medical center, and a proud history as a renowned research university. With a community and culture enriched by active student self-governance, sustained commitment to the arts, and a robust NCAA Division 1 Athletics program, the university was ranked as the No. 3 best public university by *U.S. News & World Report* in 2018. UVA is comprised of 11 schools and over 24,000 students. The university employs approximately 16,000 faculty and staff and 12,000 Health System team members.

Challenge

Overcoming Project Management Hurdles and Change Fatigue

Offering a world-class education that fosters innovative thinking, UVA established an Organizational Excellence program in 2013. The pan-institutional quality and improvement program supports and enables university goals, with a mission of "cultivating a culture of excellence." The program promotes a high-performance,

Highlights

Business Challenge

- Build change management capability
- Support project management and change management integration
- Address growing change fatigue across the institution
- Integrate change management into emerging University Project Portfolio

Solution

- Certified 54 key UVA employees in Prosci change management
- Implemented Prosci best practices in developing University Project Portfolio framework
- Leveraged Prosci's structured methodology to integrate project and change management
- Empowered project managers on large-scale projects to effectively manage change

Results

- Increased organizational capacity for change, furthering the university's culture of excellence
- Managed cumulative and collective impact of change via University Project Portfolio
- Streamlined processes and positioned project managers for success through integrated change management and project management
- Helped employees thrive through significant changes
- Supported project managers in driving successful project outcomes
- Facilitated UVA's emerging role as a change management leader in higher education

service-oriented, and continuous-improvement culture. Measurable program benefits include reduced complexity, standardization, automation, enhanced stakeholder value, and reinvestment of time and savings to support core mission activities.

Among the program's four strategic components (University Project Portfolio, Projects, Consulting Services, and Quality Communities), elevating the university's "organizational capacity for change" is a top priority. Change management is a relatively new concept in higher education and wasn't a formal practice at the onset of the university's Organizational Excellence program. Yet the university, as in corporate environments, faced constant change and the challenges that come with it.

Mary Brackett, senior associate in the Organizational Excellence program and a UVA employee for 18 years, says,

> *We were witnessing a growing sense of change fatigue across the university because teams were spinning up projects and not in coordination with one another. In addition, projects weren't achieving intended results because among other things, we weren't taking a close enough look at how changes would impact people's jobs.*

Brackett attended the 2016 Network for Change and Continuous Innovation (NCCI) conference in Montreal and was inspired by the session, *Prosci Change Management: Enhance Your University's Change Capability.* Prosci CEO Scott McAllister led the workshop, supported by several Prosci Certified Change Practitioners in higher education. "Prosci's approach to change management just made sense," says Brackett. "In addition, the practitioners provided color commentary about how they had applied the Prosci methodology in higher education, which resonated with the audience because we all face similar challenges."

The timing was right for Organizational Excellence to bring a change management practice to the University of Virginia to support its effectiveness and efficiency goals and improve project outcomes.

Solution

Enhancing Project Management and Change Management Capabilities

The Organizational Excellence team at UVA decided to build institutional change capability with Prosci change management. "We are familiar with a variety of change management theories and methodologies," says Brackett. "But Prosci especially resonates with us because it's so applicable to our higher education environment. It offers a practical toolkit with a well-defined process, which aligns perfectly with our University Project Portfolio framework and goals."
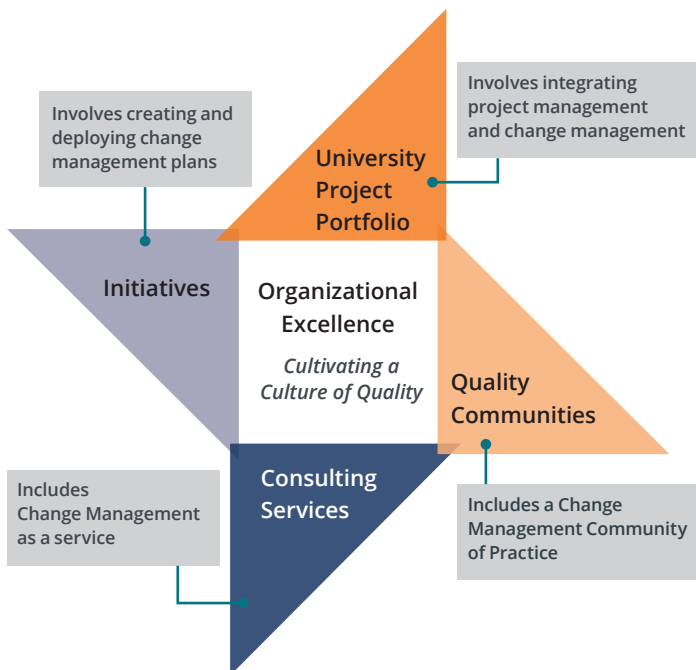
Prosci Certification Training

The first order of business was to certify key individuals in Prosci change management methodologies. Organizational Excellence sponsored a three-day Prosci Change Management Certification Program at the university in September 2017. Participants were carefully selected from partner groups that were in the middle of big changes or had them on the horizon. Strategic candidate selection based on project status also dovetailed with the program's professional development efforts.

To continue building change management capability at UVA, Organizational Excellence sponsored Prosci Change Management Certification Programs onsite in April 2018 and February 2019. Participants from the Academic Division and Medical Center represented a wide array of areas, including academic programs, facilities, finance, human resources, IT, portfolio management, process improvement, project management, student research and service learning, and workforce planning.

Through these three programs, UVA now has 54 Prosci Certified Change Practitioners from 24 diverse areas across schools.

The Convergence of Two Innovations

The change practitioners at UVA play a pivotal role in building change capability for Organizational Excellence project portfolio management as well as managing individual projects. They're also helping pave the way for integrating project management and change management as a formal practice to help drive successful change initiatives within their respective areas. In fact, change management plays a key role in all four of the main components of the Organizational Excellence program:

Involves creating and deploying change management plans

Involves integrating project management and change management

University Project Portfolio

Initiatives

Organizational Excellence

Cultivating a Culture of Quality

Quality Communities

Consulting Services

Includes Change Management as a service

Includes a Change Management Community of Practice

University Project Portfolio

One of the four main components of Organizational Excellence, University Project Portfolio provides a framework for strategic alignment and execution of pan-institutional projects. Change management is an increasingly important part of the framework. The office includes projects that are institutional in scope, such as Identity and Access Management, Faculty Annual Reporting, Data Governance, and Research Administration Improvements.

The portfolio team:
- Collects and centralizes detailed information about these large-scale projects
- Assesses collective change impacts on faculty and staff groups
- Engages with project managers to strategically align projects
- Monitors individual project progress and outcomes

UVA is innovating to adopt the portfolio approach. Says Brackett, "Not only is change management a fairly new concept in higher education, but the notion of gathering all of your projects that might impact wide groups of stakeholders across the university and bringing those into a portfolio view is a relatively innovative idea in higher education."

Organizational Excellence portfolio associate Stan Gunn, who manages the University Project Portfolio, attended the 2017 training. "During the Prosci certification training, it was revelatory to see how much more we could be doing in every phase of our projects," says Gunn.

Gunn describes how he is building change capability into the portfolio work. "Some of the project managers we work with are Prosci Certified Change Practitioners, and for those who aren't, we expose them to the Prosci methodology and how to apply change management to their projects for greater adoption and project results," says Gunn. "Our plan is to continue growing our change capability and the change management skills of our project leaders."

Integrating Project Management and Change Management

A program grounded in continuous improvement, Organizational Excellence makes strides in integrating the more technical practice of project management with the more people-focused change management.

A holistic view of various wide-scale projects, combined with Prosci's best-practice change management methodology, provides the perfect foundation for integrating the two. "Prosci provides the needed structure and rigor around integrating change management and project management as a practice at the University of Virginia," says Brackett. Importantly, the Prosci ADKAR Model focuses on adoption and usage, which supports project execution and drives value.

For now, project managers also serve as change managers for their projects. As part of the University Project Portfolio framework, project teams develop equally important project management and change management plans prior to project kickoff. Portfolio management also involves assessing change impacts on university faculty and staff.

Change management, in fact, is integrated throughout the University Project Portfolio framework—which includes discovery, design, execution and post-implementation phases. "We offer a single integrated toolkit and set of documents for our project managers to use from project discovery all the way to project closeout," says Gunn. "By combining project management and Prosci change management in our portfolio management framework, we're growing our ability to streamline processes, reduce duplication, and equip project managers with the tools for success."

Change Management Community of Practice

The decentralized, collaborative nature of the UVA environment, combined with a motivated team of new Prosci practitioners, led to a forum devoted to practitioners. Following the first Prosci program, Organizational Excellence established a change management "community of practice" within its Quality Communities. The community, which meets monthly, enables practitioners to carry the Prosci teachings forward and fosters developing a best-practices approach to applying change management in a university setting.

Brackett says, "The biggest benefit of the Change Management Community of Practice to the practitioners is to give them a sort of tribe around change management. Oftentimes, in their individual areas, they might not have others who speak the same change management language or understand the ROI of having a change management plan. This community is a place where they can get support and feedback and acquire fresh ideas on how to be successful change leaders."

Results

Furthering a Culture of Excellence by Elevating Organizational Change Capacity

With Organizational Excellence incorporating Prosci change management into its emerging University Project Portfolio and taking an integrated approach to project and change management, the organization delivers on its performance and efficiency goals. In addition, Prosci change practitioners in key functional areas are implementing Prosci methodologies and applying the Prosci ADKAR Model to projects. As a result, faculty and staff are better prepared to adopt significant change and thrive in a shifting institutional environment.

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> *Stan Gunn, University Project Portfolio*

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Managing the People Side of Change

The University of Virginia and Organizational Excellence embrace the reality that organizational change happens only when people change. Having Prosci change practitioners dispersed throughout the Academic Division and Medical Center builds change capability and enhances the university's capacity for change. This in turn supports UVA faculty and staff by easing their change experiences, ultimately driving successful project outcomes. Several Prosci Certified Change Practitioners at UVA offer a glimpse at how they're leveraging Prosci methodologies on their projects.

School of Medicine – VMED

The School of Medicine recognizes the importance of change management for numerous initiatives led by the Project Management and Continuous Improvement team. One of the first steps was to develop and deliver meaningful training to executive leadership.

VMED is one project leveraging Prosci's change management principles. An integrated learning, curriculum and student management system, VMED provides a seamless experience for students, faculty and administration. It delivers ongoing data necessary for continuous quality improvement. Initial phases of this large-scale project rolled out in 2018 with other releases to come in the future.

Kim Holman, senior project manager in the School of Medicine, VMED project manager, and Prosci Certified Change Practitioner, uses Prosci methodologies to ensure a strategic approach to managing the people side of the change. "I've been in IT for 20 years, and IT projects often focus on the technology component, only occasionally thinking about preparing people for the change," says Holman.

> **Prosci helps us to be more intentional about understanding and addressing the impact our IT projects will have on each and every individual.**

The team assesses change readiness and other organizational attributes using ADKAR Assessments. They're also queuing up their strategy to manage the inevitable resistance that comes with change, especially large enterprise change. Using Prosci's sponsor assessment, the coalition of sponsors assessed the competencies of key stakeholders. This assessment guided the Communications Plan as recommended by Prosci. "I've come to believe that communication and effective sponsorship are 80% of project success," says Holman.

Looking ahead, Holman is optimistic about project outcomes. "Using Prosci's approach to change management, we envision smoother transitions between different phases of the implementation and stronger acceptance of the project deliverables in the School of Medicine moving forward," she says.

Medical Center

Don Demarco, the director of the Medical Center Program Management Office for more than four years, attended the Prosci Certification Program at UVA in 2018. The projects he is involved in were underway at the time of his certification, but he leverages Prosci change management practices to help move his projects forward and increase chances for their success:

- **IT Space Planning** – The project, which involves reevaluating and recalibrating the locations of IT individuals and teams due to growing space constraints, is creating disruption for employees uncomfortable with the change. Regular communication from project sponsors is key.

"We're implementing a Communications Plan based on ADKAR Model change principles around awareness, desire and knowledge, which is helping to keep people at ease around having to move," says Demarco.

- *Ambulatory Optimization* – This UVA Medical Center project involved assessing Ambulatory Clinic operations and workflows to establish standardized operations across all clinics. Change managers analyzed planned operational improvements based on Prosci's current state/transition state/future state model, which led to establishing important KPIs for measuring the success of those changes.

- *Enterprise Communication* – With cell phones, pagers and other communication devices dispersed across the UVA Health System and Medical Center, the Medical Center Program Management Office is deploying a unified communication system for communication reliability and cost savings.

  "This is a large change event that will impact how people do their daily work," says Demarco. "Most are happy with the change, but we also have tenured physicians tied to their pagers. Resistance management will be an important part of our change management strategy."

Demarco sees significant opportunity to leverage Prosci change management methodologies on Medical Center projects moving forward. Previously, the quest for leadership support for projects happened in the late stages of the project with mixed results. Project managers also didn't focus on the people side of change until close to project launch. Prosci training has changed that model. Says Demarco, "Prosci gives me the knowledge and tools needed to secure our important change sponsors early on, and to start educating my stakeholders and my team about planned changes and their impact. This sets us up for greater project success."

Demarco uses the Prosci ADKAR Model to build Sponsor Roadmaps and develop champions for each project.

Faculty Annual Reporting

A recent addition to the University Project Portfolio, Faculty Annual Reporting is an online reporting system that helps faculty members track achievements and accomplishments throughout the year. The project involves moving from a purely paper-based system, or in some cases multiple paper-based systems, to a single electronic system. The expected efficiencies are clear, and so is the need for users to get onboard with the idea of changing a long-standing practice.

Gunn worked with the project owner to incorporate change management from the start. "I explained the change management strategy we're building into our University Project Portfolio framework, and the importance of moving users through each of the five stages of the ADKAR Model," says Gunn. "It was like a lightbulb went on for him around the impact this approach will have on his project. The system part is easy compared to user adoption. Change management, and especially building awareness and a desire to use the new system, is incorporated into the project plan and are critical to the success of the project."

Enabling Project Success

Tricia Simpson, director of Project and Portfolio Management in the university's CIO office, became a Prosci Certified Change Practitioner through the 2017 training at UVA, a notably positive training experience. "I came from private industry and have had a lot of training through the years," says Simpson.

> *Prosci is the best structured methodology for change management I've ever seen. Interestingly, I came away from the training understanding why projects have struggled in the past ... and more importantly what should be done differently in the future.*

Projects in higher education have a large number of highly distributed stakeholders. The sponsor coalition assessment in the Prosci Impact Index is uniquely suited to identify who already supports the project and where additional discussion is needed. Simpson used the sponsor coalition and PCT assessments to identify a significant gap between stakeholder support and initially scoped project objectives.

As a result, the team stepped back to reconsider IT project goals and realized that it was possible to deliver value in a manner that will be more acceptable to project stakeholders. Identifying this issue and a solution so early in the project is a huge win for the team and sets them up for success.
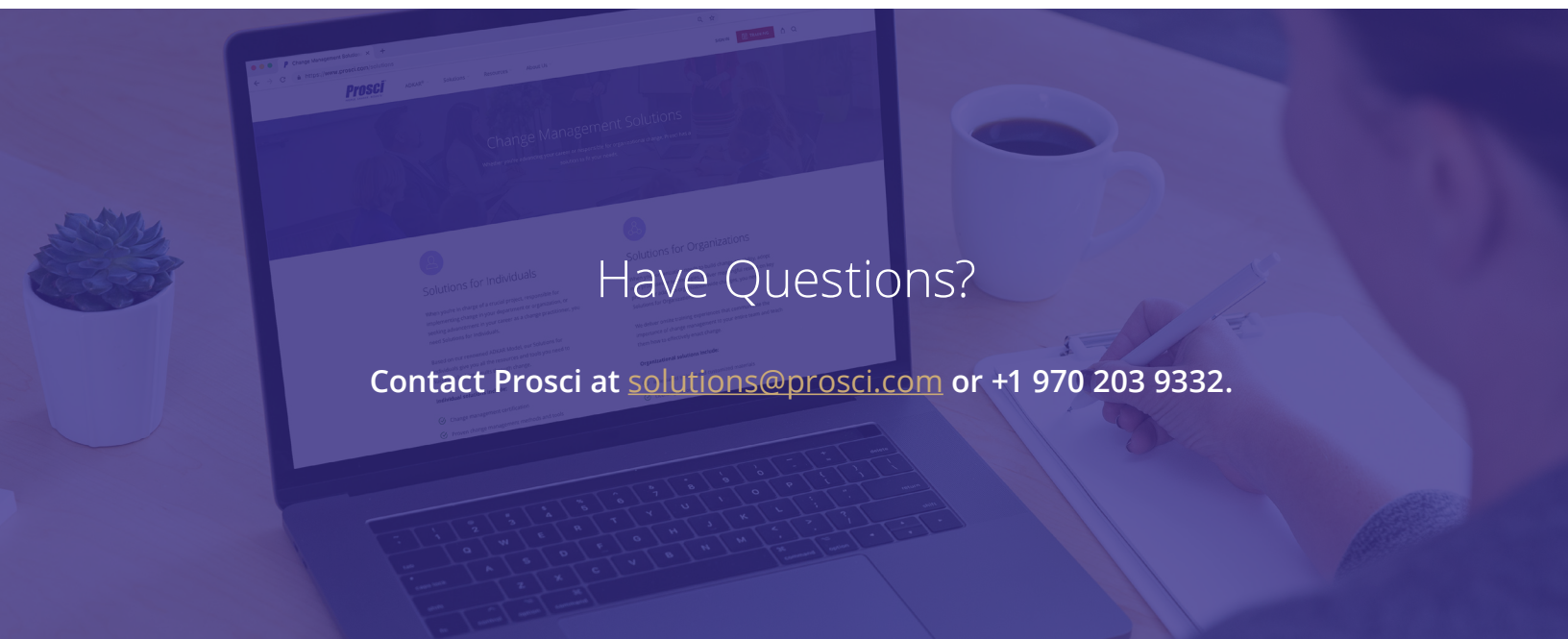
Looking Ahead

As of the end of FY 2018, UVA completed 275 improvements, partnerships and cost-saving initiatives with an annual savings of time and money totaling $21.9 million and a cumulative savings of $82.1 million over four years. Organizational Excellence sees building change capability to empower project owners and help individuals thrive through change critical to its continued success.

Organizational Excellence plans to host subsequent Prosci Change Management Certification Programs in the future to add more change leaders to the institutional mix. In addition, the organization will continue monthly meetings for its Change Management Community of Practice to further develop its best-practice approach to managing change in higher education.

"Prosci is changing the way we approach projects and project management," says Brackett. "Looking at our portfolio of projects through a change management lens helps us not only horizontally across the organization, but vertically within each one of our projects. Project managers are consistently more invested in thinking about the impact of their projects on their stakeholders. The effect this is having on project ROI and outcomes cannot be overstated."

For information about Organizational Excellence at the University of Virginia, please go to organizationalexcellence.virginia.edu or contact Mary Brackett at mcb6m@virginia.edu.

Have Questions?

Contact Prosci at solutions@prosci.com or +1 970 203 9332.