Shifting Change Implementation Approaches to Maximize Success: A Case Study

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Northwestern

Introduction

Northwestern & OSC

PollEverywhere

Polling Exercise
Using *PollEverywhere*

To participate:
text **ocm123** to **22333**

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At what type of institution do you work?

Public

Private

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How many enrolled students does your institution have?

Less than 5,000 students

5,000 - 20,000 students

More than 20,000 students

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To what extent are you involved in determining the structure that is used for a project?

To a great extent

To some extent

To little or no extent

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Agenda

1. The Beginning

2. What Changed?

3. The Pivot

4. Work Continues

Learning Outcomes

1. Assess

when a new approach is warranted by responding to changes in organizational context that can impact the structure and cadence of a change initiative.

2. Apply

best practices on how to bridge gaps between a formal institutional initiative and a more dispersed and informal implementation structure.

3. Utilize

tools & strategies for carrying initiatives forward despite un-anticipated interruptions, particularly the disruption many faced during the Covid pandemic.

Change Success Factor

Change self-efficacy:

"One's perception of their ability to deal with change and to continue performing their tasks in spite of the demands of the change."

Increasing the self-efficacy of people involved in the change and giving them confidence that they can achieve the intended results **leads to successful change outcomes.**

Giovanita, D., Mangundjaya, W. (2017). Transformational Leadership vs Change Self-Efficacy and its Impact on Affective Commitment to Change. Journal of Management & Marketing Review, 2, (4). 13-18. 10.35609/jmmr.2017.2.4(3)
Bayraktar, S., Jiménez, A. (2020). "Self-efficacy as a resource: a moderated mediation model of transformational leadership, extent of change and reactions to change", Journal of Organizational Change Management, 33, (2). 301-317. https://doi.org/10.1108/JOCM-12-2018-0368

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Our Challenge

How can Northwestern University **better support** first-generation, low-income (FGLI) and/or historically underrepresented minority (URM) students?

Timeline
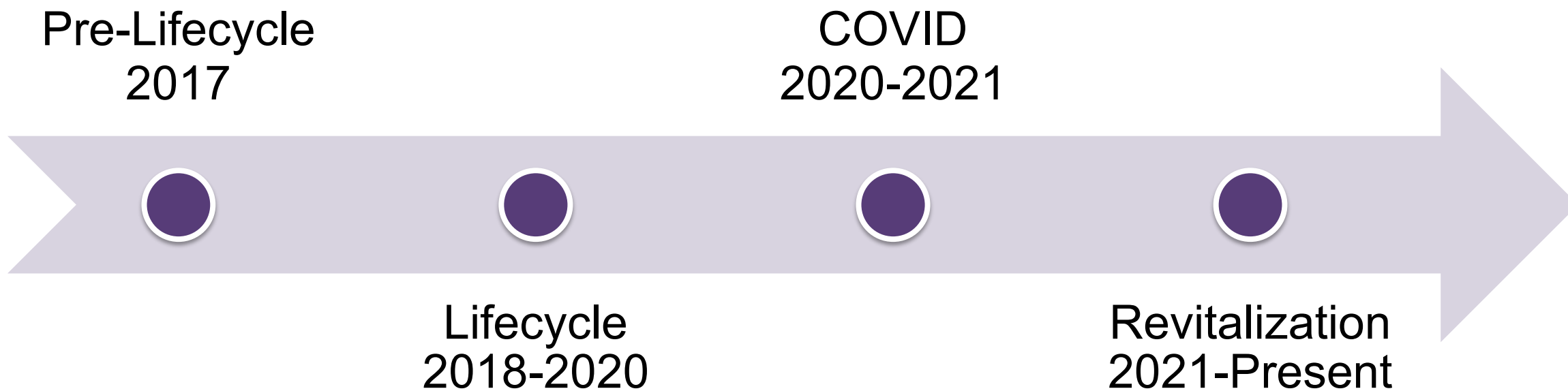
The Beginning

Pre-Lifecycle (2017)

- **Early change efforts**
  - Increased pre-enrollment and first year experience programming to acclimate to Northwestern
  - Launched new academic learning and support programs
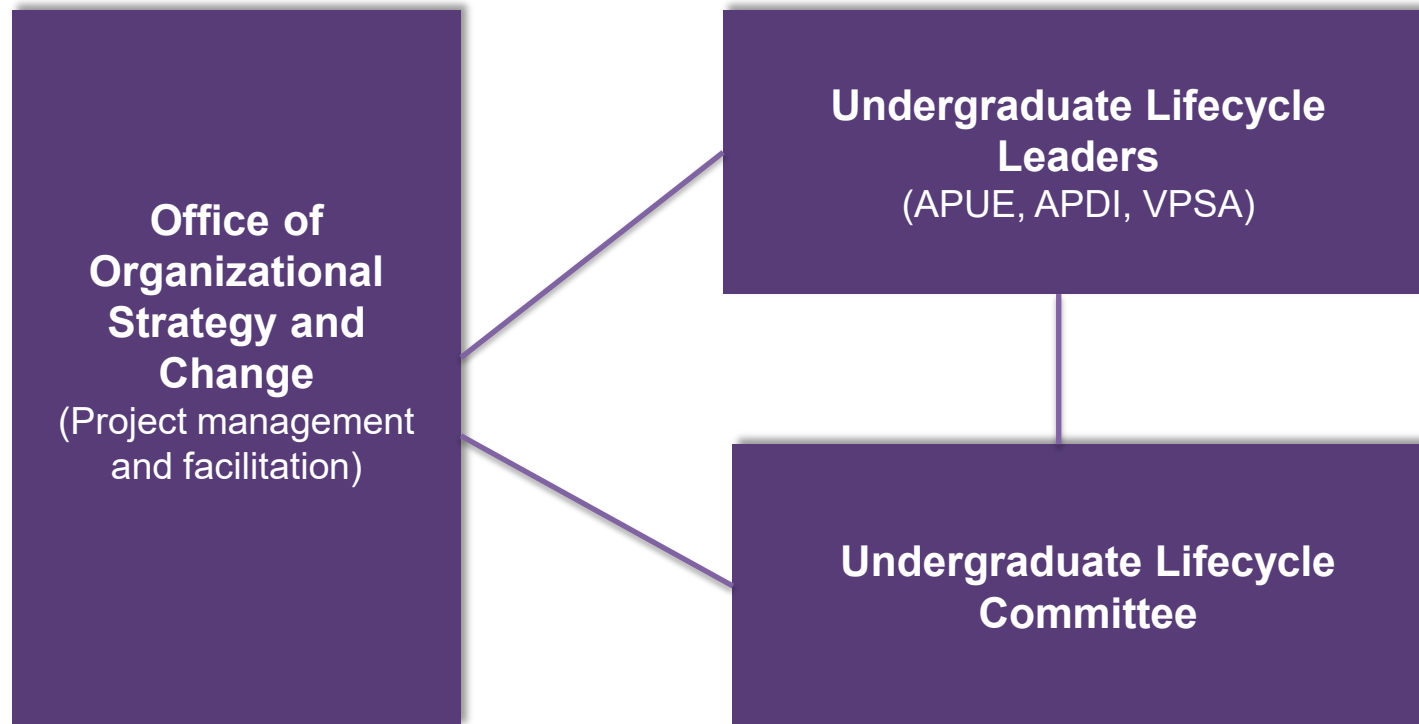 - Established Student Enrichment Services – community building and resource navigation
- **Data gathering**
  - Demographic Data
  - Inventory and Assessment of Programs and Services
  - Peer Benchmarking

Lifecycle Governance

Provost sponsored cross-functional, high-profile initiative

Office of Organizational Strategy and Change
(Project management and facilitation)

Undergraduate Lifecycle Leaders
(APUE, APDI, VPSA)

Undergraduate Lifecycle Committee

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Committee Structure

- **3 Workgroups**
  - Faculty Engagement
  - Navigating the University
  - Resources: Academic, Co-Curricular, and Community
- **Extensive data already provided**
  - Purpose was to focus on interpreting data to come up with actionable recommendations
- **Short timeframe and clear charge**

Implementation Structure

- **Highly structured implementation**
  - Clear direction and timeline
  - Assigned roles
  - Check in meetings with accountability and dealing with overlap
  - Brought in new people into implementation: Diverse input
- **Lifecycle resource requests**

Factors for Success

☑ Strong vision and priorities

☑ Energy and a sense of purpose

☑ Resources estimated and funds allocated

☑ Strong sponsor buy-in

☑ Clear charge & structure

☑ Individuals with expertise and personal experience

☑ Clear authority to make changes

What Changed?

What Happened?

- COVID
- Resource request process stopped: bad timing
- Provost left
- Chief Diversity Officer left
- University financial challenges
- Bandwidth – crisis control
- Time passed, others left, and relationships stalled

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By 2021

Lost momentum

Change fatigue

New leadership

Resource constraints
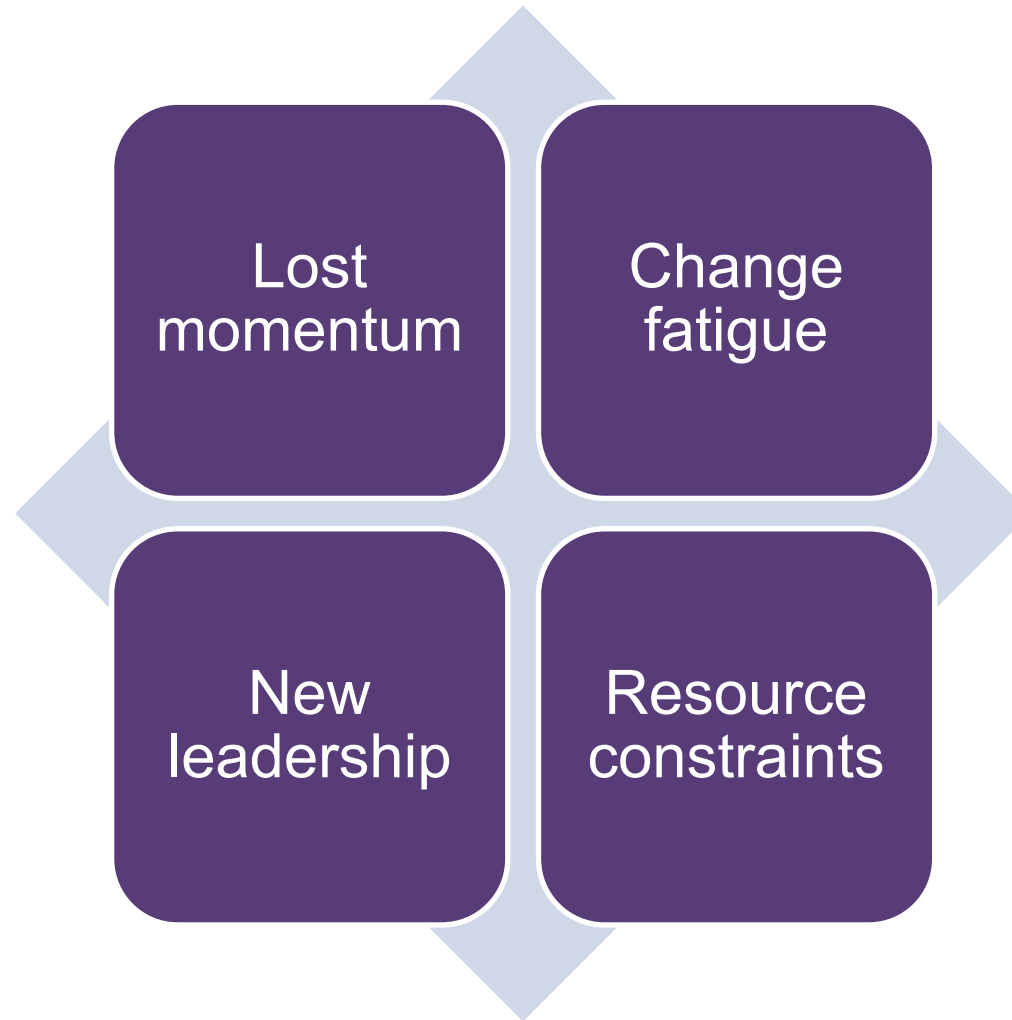
Activity *(Think/Pair)*

Part #1: THINK *(2 minutes)*

- Think of a planned change (work or personal) that was upended or disrupted in some way
- What shifted? (people, context, timing, other?)

Part #2: PAIR *(4 minutes)*

- Take two minutes each to briefly describe the project and what changed

The Pivot

How do you revitalize implementation?

After the pause…

- What was the feasibility of revitalizing the implementation which was largely paused during the COVID-19 pandemic?
- Was there institutional buy-in to resume?
- If so, how could we design a structure to maximize success?

New Context

- Broader priority to dismantle structural racism and inequity
- Many Lifecycle recommendations had come to fruition in part or in full despite obstacles
- Significant progress in many different schools and units in pockets
- Interest in goal but no capacity to support large-scale initiative
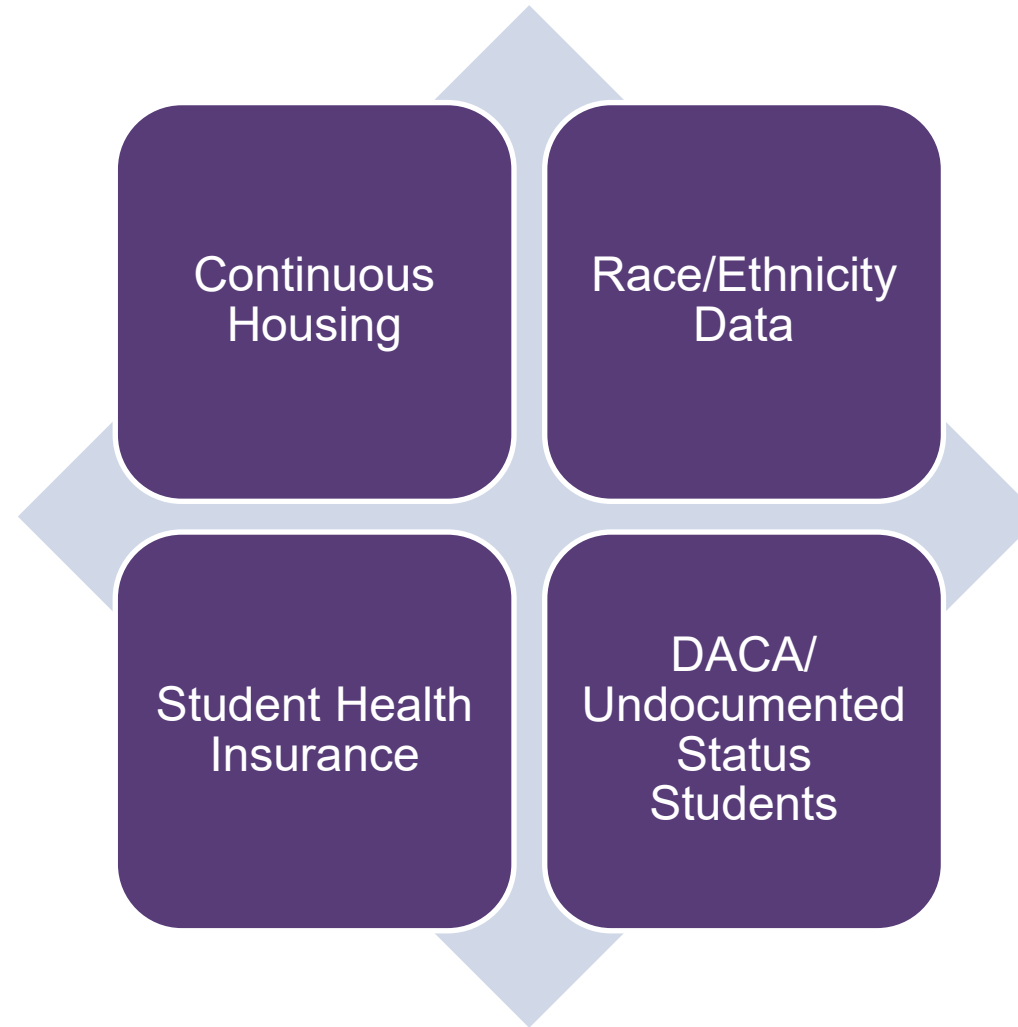- Fatigue

Revised Structure

- Brainstormed known barriers that were actionable; focused on four
- We went to the on-the-ground people responsible for this work
- We tackled problems that were well understood and felt achievable
- We had updates and touchpoints:
  - We included the on the ground people in these—directly update leadership

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Four Barriers to Student Success

Continuous Housing

Race/Ethnicity Data

Student Health Insurance

DACA/ Undocumented Status Students

Why Did the Shift Work?

- Brought in new people
- Let go of baggage and history of long-term project
- Met people where they were
- Felt tackle-able at a time when people were exhausted
- Allowed people to stay in their area of expertise

Activity: Project Pivot Consultation

Working in the same pairs as before, take turns acting as a consultant on your partner's challenge from the last activity. Ask them questions to diagnose the challenge and come up with a hypothetical solution.

(5 – 7 minutes each)

Diagnosis
- What factors in the new context "got in the way" of your project's success?
- Which factors lowered self-efficacy?

Pivot
- What did you do in response to the challenge?
- What did you learn today that you could apply to this scenario?
- Are there other ways you could increase self-efficacy of those involved in the scenario?

Work Continues

Where Are We Now?

- **FGLI Focus Groups & Survey Data Analysis**
  - Qualitative & Quantitative indicators of progress made
  - Continued challenges identified

- **Supporting Student Success**
  - Developing metrics to see and ensure continued progress
  - Partnering now with internal schools and units to develop them

Takeaways

- Different structures work for different times and context
  - Even at the same institution with many of the same players!
- Do not be afraid to shift when the context shifts
- Stay nimble
- Focus on the purpose and the goals
- Find the people who care and are already working on the topic
- Increasing self-efficacy leads to successful change outcomes

Q&A