Behind Every Great Leader Is a Superb Change Manager

Preparing Leaders to Sponsor Change

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Hello! I'm Sarah Fidelibus.

- Director of the EVCP Projects Team in the Executive Vice Chancellor and Provost Organization at UCSF

- More than 2 decades of experience in learning design and facilitation

- M.A. in Organizational Learning and Effectiveness from University of the Pacific

- ProSci Certified Change Management Practitioner

- Chair, NCCI Professional Development Committee

Thanks for joining today!

In the Zoom chat, please share where you are joining from (institution + city).

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Help me learn more about you! Let's do a quick Zoom poll.

About UCSF & the EVCP Organization

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- ❖ ~ 6,300 learners (students, residents, postdocs) – graduate education only
- ❖ Health focus (campus + healthcare system)
- ❖ ~46,000 employees
- ❖ Comprised of dozens of locations in SF and beyond (including affiliate healthcare centers)

EVCPO

- ❖ Eight "primary" units (including Office of Research, UCSF Library, Faculty and Academic Affairs, Student Affairs)
- ❖ ~ 1,200 employees

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Quick Housekeeping

Have a question? Please raise your Zoom hand; it helps me to have a queue so that I don't miss anyone.
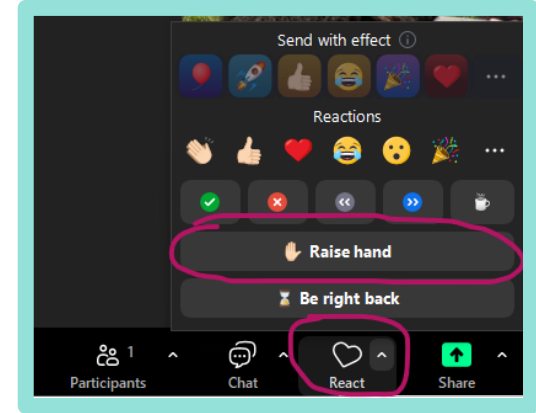
OK to raise your Zoom hand whenever a question occurs to you (don't have to wait for a specific time).

Reaction emojis are also OK to use (and encouraged!).

Please also feel free to share ideas/responses/reactions in chat.

NCCI Exchange: Preparing Leaders to Sponsor Change

Session Learning Objectives

By the end of today's NCCI Exchange session, participants will:

1. Understand the role and importance of sponsorship in change projects

2. Have practiced using Who, What, Why, How questions to prepare for socializing change with sponsors

3. Be able to assemble the right leaders to sponsor change projects

4. Understand "leader behaviors" for change management and how to make those behaviors explicit for change sponsors

Linking Objectives to NCCI Core Competencies

Objective	NCCI Core Competencies for Change Management
• Understand the **role and importance of sponsorship** in change projects • Be able to **assemble the right leaders** to sponsor change projects	Engaging stakeholders to achieve alignment and support for change initiatives
• Have practiced using **Who, What, Why, How questions** to prepare for socializing change with sponsors	Conveying ideas to others in different ways to support intentional change
• Understand **"leader behaviors" for change management** and how to make those behaviors explicit for change sponsors	Guiding discussions and decisions to understand, adapt to, and support change

https://ncci-cu.org/education/learning-framework/

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Key Roles in Change Management

1 Sponsors
- Serve as visible and vocal champions of change
- Define scope and allocate resources (including time)

2 Change Manager
- Maps out the particulars of the change based on the scope
- Develops messaging and plans for helping sponsors lead change

3 Project Manager
- Organizes work to keep teams on track
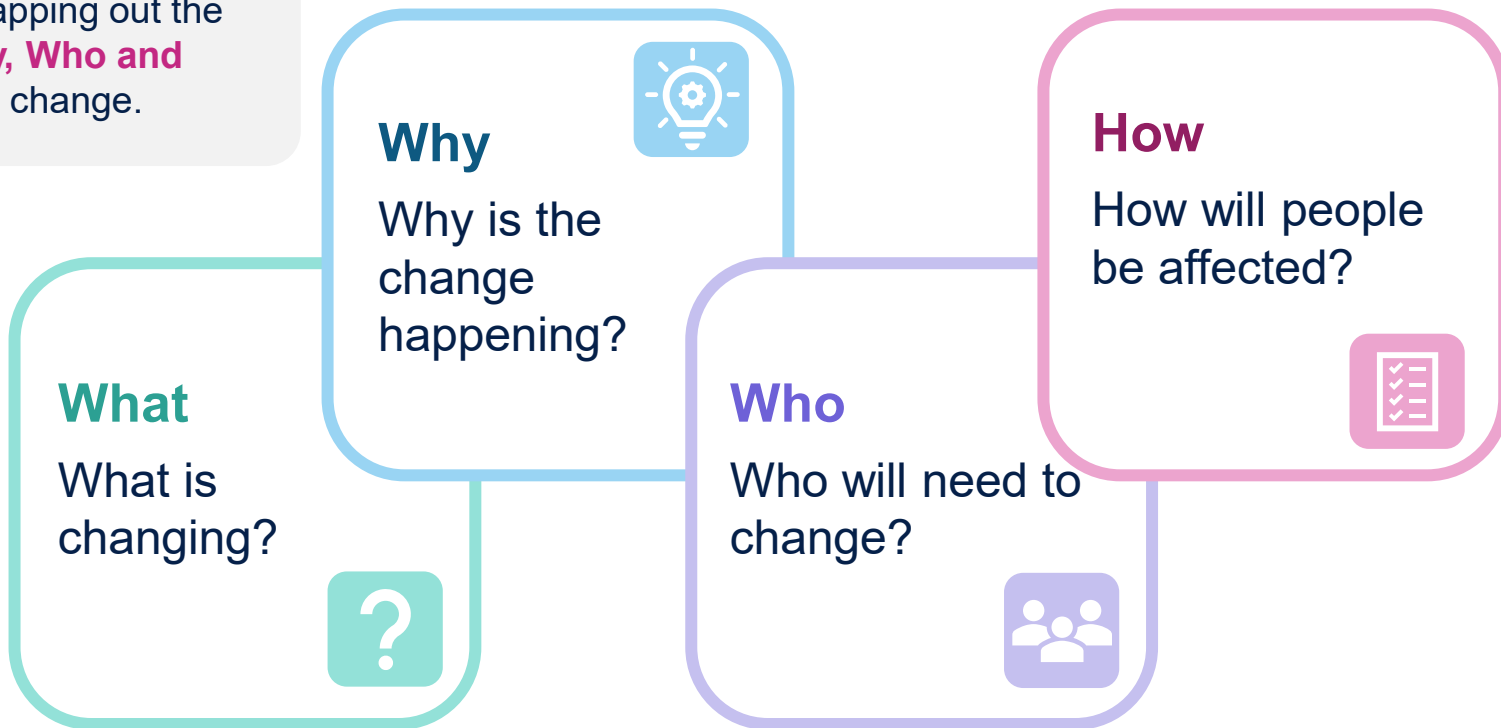- Manages resources to keep the project within scope

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Three Phases to Launch

Major Milestones in the Leadership Preparation Process

Preparing Yourself	Engaging Sponsors	Equipping Sponsors to Lead Change
☐ Map out the What, Why, Who and How of the change project	Present socialization deck to sponsors	Prepare change management and communication plan
☐ Assemble change governance model	☐ Educate sponsors about how to fulfill their role	Prepare initial announcement about change
Create "socialization deck" for sponsors	Gather input from sponsors via "structured conversation"	Require sponsors to present socialization deck to their respective staff

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Preparing Leaders to Sponsor Change

Start by mapping out the **What, Why, Who and How** of the change.

Why

Why is the change happening?

What

What is changing?

Who

Who will need to change?

How

How will people be affected?

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Example What, Why, Who, and How

From the UC *Gender Recognition and Lived Name* Policy Implementation

|	
What is changing? • All individuals have university-issued ID documents and displays of personal identification information that recognize their **accurate gender identity** and **lived name**	**Why is the change happening?** • Ensure we are living up to our stated values in which inclusivity and belonging matter • Affirm each other's identity and establish trust • Legal name changes can be complicated and may not be possible for people for a variety of reasons • Accurate collection of gender identity data is necessary for federal reporting and assessing gender equity
Who will be affected? • UCSF staff, faculty and students • UCSF patients	**How will people be affected?** • **Managers and other leaders:** Enact + enforce policy • **Staff, faculty, learners, patients:** – Comply with practice of using lived name, correct pronouns • **System admins:** Change system search practices (from using legal name to using ID number) • **People who need to update UCSF data to reflect lived name and/or pronouns:** Enter info into appropriate platform(s)

Solo think time

3 minutes

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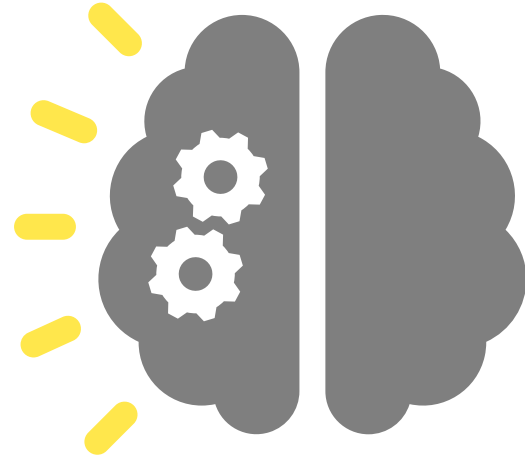
Your What, Why, Who, and How

What is changing?

- What is the change? A new software? A new process? A new policy? Something else?

Why is the change happening?

- Why are we changing?
- What are the benefits (to staff? To students? To the organization?)?
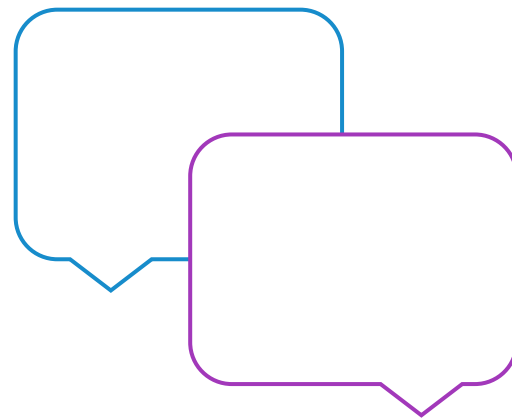
Who will need to change?

- Everyone?
- Managers only?
- Students only?
- Students and staff who interface with students?

How will people be affected?

- Is everyone changing in the same way (e.g., new software)?
- How will managers need to change?
- How will staff need to change?

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Breakout Pair Share

6 minutes

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Breakout Instructions

You'll be in pairs for this breakout. Here's how to spend your time:

1   **Introductions –** 30 seconds each, total of 1 min.

2   **Take turns sharing your What, Why, Who, and How–** 2.5 min. each, total of 5 min.

When it is your turn to present:	When it is your turn to listen:
• Share the *What, Why, Who and How* of your change • What challenges or opportunities do you see in the work ahead, based on your answers to the What, Why, Who, and How questions?	• Ask clarifying questions • Share any thoughts or ideas that stood out to you as you listened to your partner share the specifics of their change project.

Questions

- What new questions came up for you as you answered the What, Why, Who, and How questions?

Comments

- Would you like to share any insights from past experiences or discoveries you had as you worked to understand the scope of a change project?

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Governance: Leaders Sponsoring Change

What is change governance?

- An accountability structure that ensures appropriate levels of leadership are engaged to keep a change project moving forward toward achieving outcomes in the time allotted
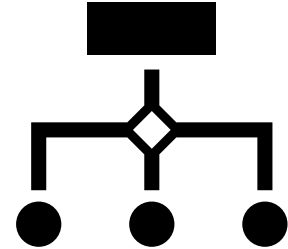
When is governance needed and why?

- Essential for large changes (e.g., major technological implementation, process or policy changes)

- Appropriately-designed change governance groups:

  a. Have members who are prepared to be "visible and vocal champions of change"

  b. Ensure the project is adequately resourced (money, people, time)

  c. Are structured to ensure quick resolution to challenges escalated by the change team

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Sample Governance Structure

Executive Sponsor

Executive Vice Chancellor and Provost (EVCP)

- **Decision-maker** for policy and process changes to support implementation
- **Visible and vocal champion** of change
- **Resolves challenges** escalated from Functional Sponsors
- **Allocates** resources as needed

Functional Sponsors

EVCP Direct Reports

The bulk of your time and energy will be spent preparing this group to lead change.

- **Visible and vocal champions of change** throughout planning and implementation
- **Disseminate communications** within their respective units throughout planning and implementation
- **Provide input** as needed during policy and process development
- **Resolve challenges** escalated from Change Manager/Change Implementation Team

Change Implementation Team

Representatives from each unit in EVCP Organization

- **Share feedback** with change manager Re: implementation/communication gaps and successes
- **Support Functional Sponsors** in sharing information and resources with colleagues
- **Ensure completion** of project deliverables

Who belongs in your governance model?

Executive Sponsor

Who should play this role? This person is often at the executive level in the organization or department experiencing the change.

- **Decision-maker** for policy and process changes to support implementation
- **Visible and vocal champion** of change
- **Resolves challenges** escalated from Functional Sponsors
- **Allocates** resources as needed

Functional Sponsors

When you look at the responsibilities here, who in your organization/department/unit should play this role? These are often senior people with positional power.

- **Visible and vocal champions of change** throughout planning and implementation
- **Disseminate communications** within their respective units throughout planning and implementation
- **Provide input** as needed during policy and process development
- **Resolve challenges** escalated from Change Manager/Change Implementation Team

Change Implementation Team

You will need this team, too, but it's not our focus today. Please reach out if you have questions or want advice!

- **Share feedback** with change manager Re: implementation/communication gaps and successes
- **Support Functional Sponsors** in sharing information and resources with colleagues
- **Ensure completion** of project deliverables

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Comments

- If you have used a governance model before, what are some key considerations you think are helpful for others to think about?

Questions
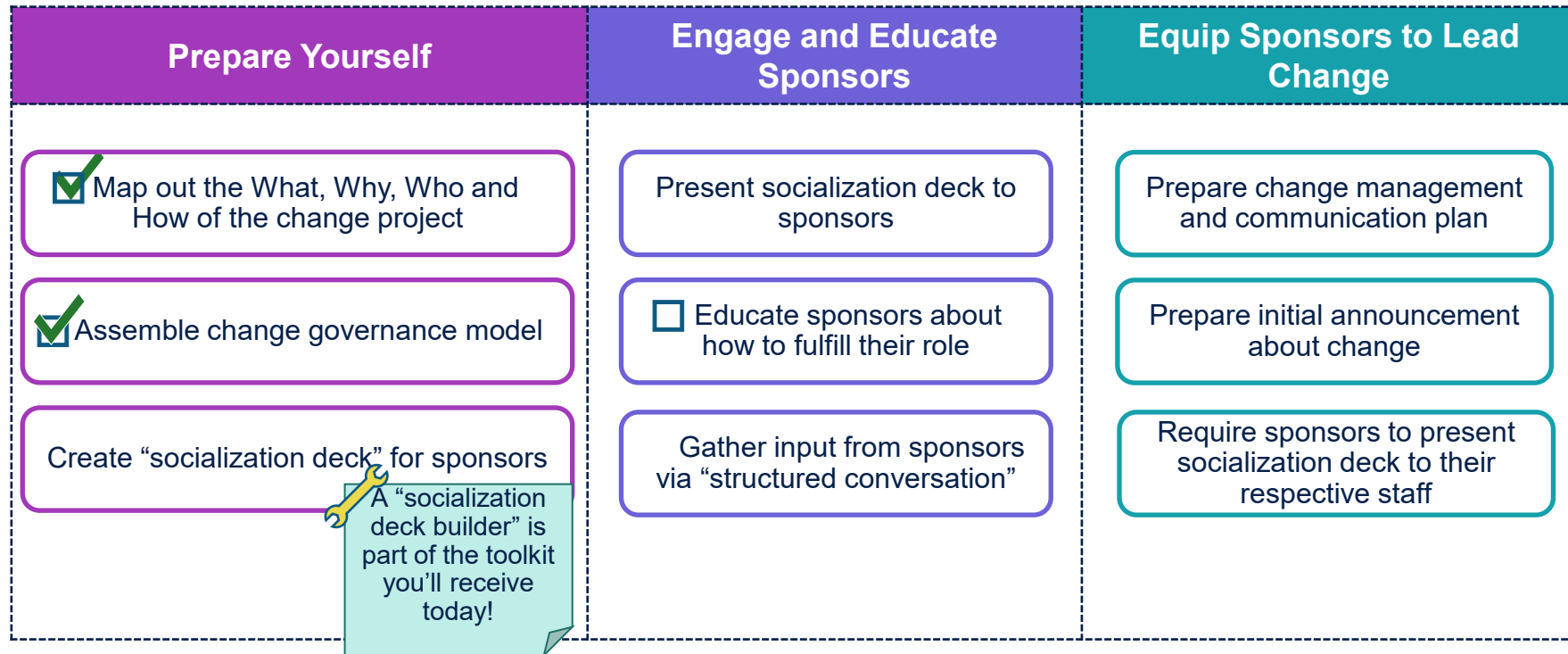
- What questions do you have about putting a governance model together?

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A "socialization deck builder" is part of the toolkit you'll receive today!

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Educating Sponsors

What does it mean to be a "visible and vocal champion of change"?

- You will need to educate your sponsors on "leader behaviors" and why those behaviors are important to successful change management.

- One great way to do that is to share and discuss this article from ProSci:

  https://www.prosci.com/blog/primary-sponsors-role-and-importance

*When asked to identify the biggest **obstacle** to success, [study participants] identified a **lack of executive support and active sponsorship** as their primary obstacle to success.*

*An effective primary sponsor **legitimizes the need for change within the organization** and sets the prioritization of change through direct engagement with impacted employees.*

*Sponsors **cannot disappear** once they've attended the kickoff meeting for a project. Their sustained presence is necessary to build and maintain momentum for a change.*

https://www.prosci.com/blog/primary-sponsors-role-and-importance

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Share in the chat:

- What comes to mind when you think about **"leader behaviors"**?

- What are **specific actions** leaders can take to be "visible and vocal champions of change"?

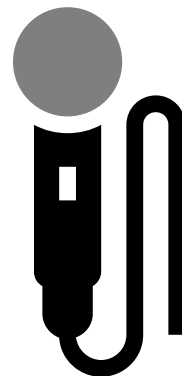UCSF

Leader Behaviors and Examples

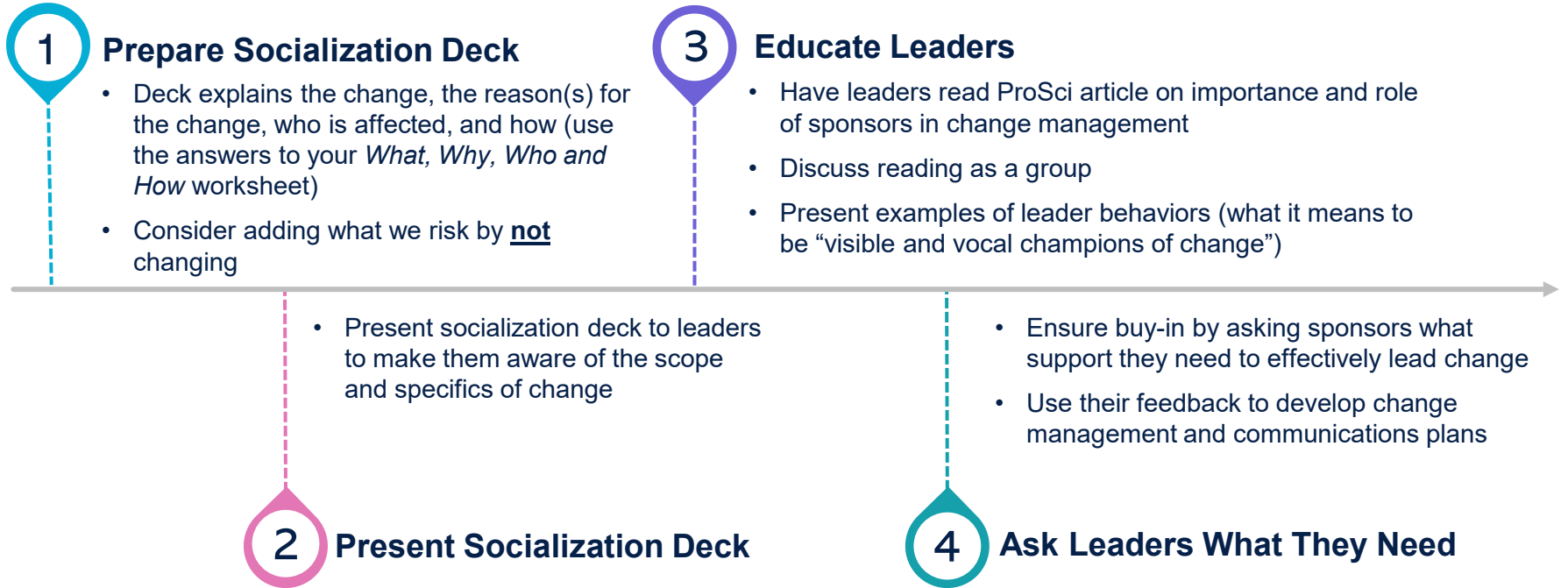| Behavior	Example
• **Be vocal** about the benefits of the change and why you are excited about it	• Present in department all-hands or town hall • "Road Show" in which leader visits a team's weekly huddle or other meeting
• **Inform and solicit input** from staff	• Share updates in department e-newsletter or department-wide email • Survey or talk to staff for their input
• **Model the change** – be the first on-board	• New software? Be among the first to test it out and to talk up its benefits. • New process? Be the first adopter. Be vocal about what makes it better. • New policy? Be visible about complying with the policy.

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Take the Mic! Share with Us:

- What opportunities already exist for your leaders to talk about a change to their staff (or students or faculty)?

- What new opportunities might you need to create to get leaders "in front of staff"?

- What communication channels already exist that you could leverage for leaders to inform and solicit input from staff?

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Preparing Leaders to Sponsor Change
Process Map

1 **Prepare Socialization Deck**

- Deck explains the change, the reason(s) for the change, who is affected, and how (use the answers to your *What, Why, Who and How* worksheet)

- Consider adding what we risk by **not** changing

3 **Educate Leaders**

- Have leaders read ProSci article on importance and role of sponsors in change management

- Discuss reading as a group

- Present examples of leader behaviors (what it means to be "visible and vocal champions of change")

- Present socialization deck to leaders to make them aware of the scope and specifics of change

- Ensure buy-in by asking sponsors what support they need to effectively lead change

- Use their feedback to develop change management and communications plans

2 **Present Socialization Deck**

4 **Ask Leaders What They Need**

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Keeping Sponsors Engaged

Keep sponsors engaged through the entire change management lifecycle:

1. Establish a cadence for regular sponsor meetings and stick to it. If your leaders are sponsoring the project, they should be treating it as a priority, and doing so includes investing the time to meet to advance project goals.

2. Develop talking points, presentations, and other materials to help leaders champion the change to their respective audiences.

3. Any time you are asking sponsors to complete a specific task, give clear directions for what they need to do, when you need them to do it, and how to access any materials they will need in order to complete the task.
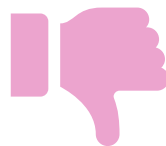
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Questions
Comments
Reactions

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Thank you!

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