

EUNAV^AVERSE

Driving Adoption: Change Management Strategies that Work

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Agenda

2025.09.09

01. An overview of change management

02. Best practices for communicating and implementing change

03. Tangible examples to help bridge the gap between project management and change management

1. An overview of change management



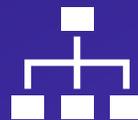
What is Change Management?

An enabling framework for managing **the people side of change**.



At the project level

The application of the structured process and set of tools for leading the people side of change to achieve a desired outcome on our project.



At the organizational level

A leadership competency for enabling change within our organization and a strategic capability designed to increase our change capability and responsiveness.

Why pursue Change Management as a practice?

Providing a **structured** and **intentional** approach to rollout via change management increases the overall likelihood of success for a project by supporting individuals and organizations through change.

- Organizations want to ensure organizational changes will “stick”
- Organizations must measure that their processes are effective

What Change Management have to do with our work?

Time & Effort Rollout

- University Setting with Faculty
- Friday Afternoon, ad hoc meeting, in person with remote trainer
- No agenda shared in advance, or introduction to current or future business processes
- STRANGER DANGER

Pre-Award Workflow Rollout

- Small City for Department Staff
- Thursday morning, regularly scheduled meeting, all remote
- Agenda shared in advance, mapped documentation from current to future state
- Colleague / Staff Presenter

2. Best practices for implementing and communicating change



Best Practices for Implementing and Communicating Change

Prepare to Change

- Knowing where you want to be

→ Plan

Manage Change

- Communicate frequently, openly and with an engaged audience

→ Implement

Sustain Outcomes

- Provide feedback and continue to iterate

→ Sustain

Best Practices for Implementing and Communicating Change

Preparing to Change

1. Consider your current state

- What are your pain points?
- Are your current program operations in line with your overall mission?
- How would aligning your operations with your mission solve for those points?

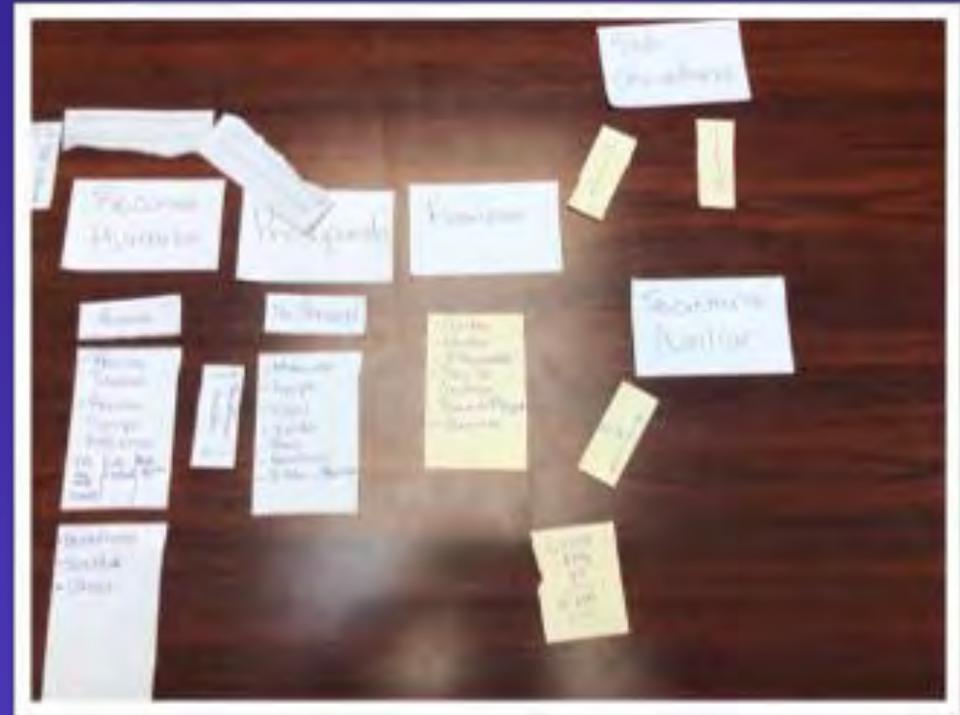
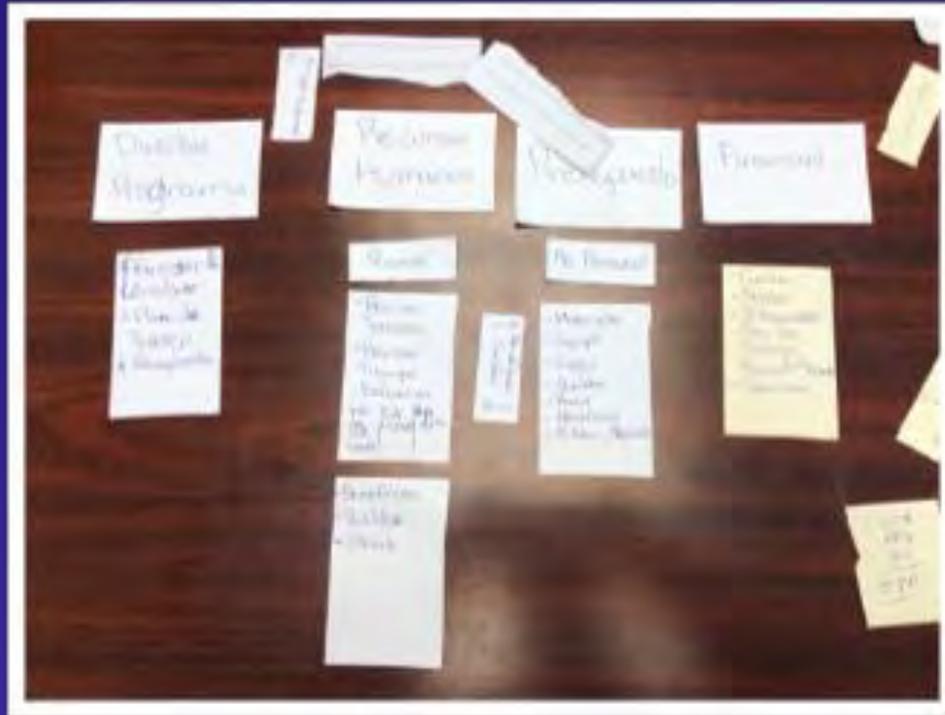
2. Document your current processes

- Create a grant management process map (table or sticky notes)
- Document actions, associated documents, responsible parties, and the communication methods for each step in a process.
- Document what needs to be incorporated or changed?

Best Practices for Implementing and Communicating Change

Preparing to Change

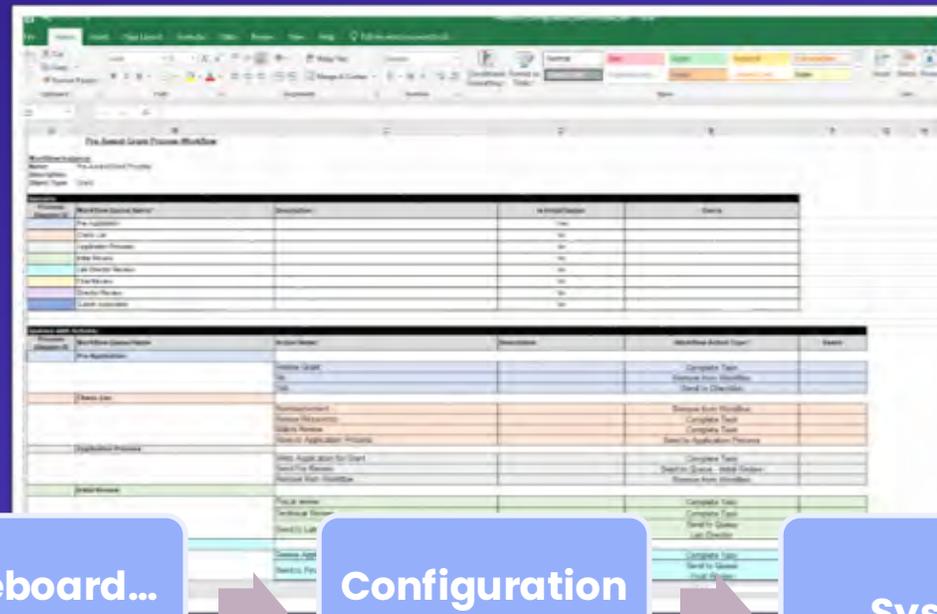
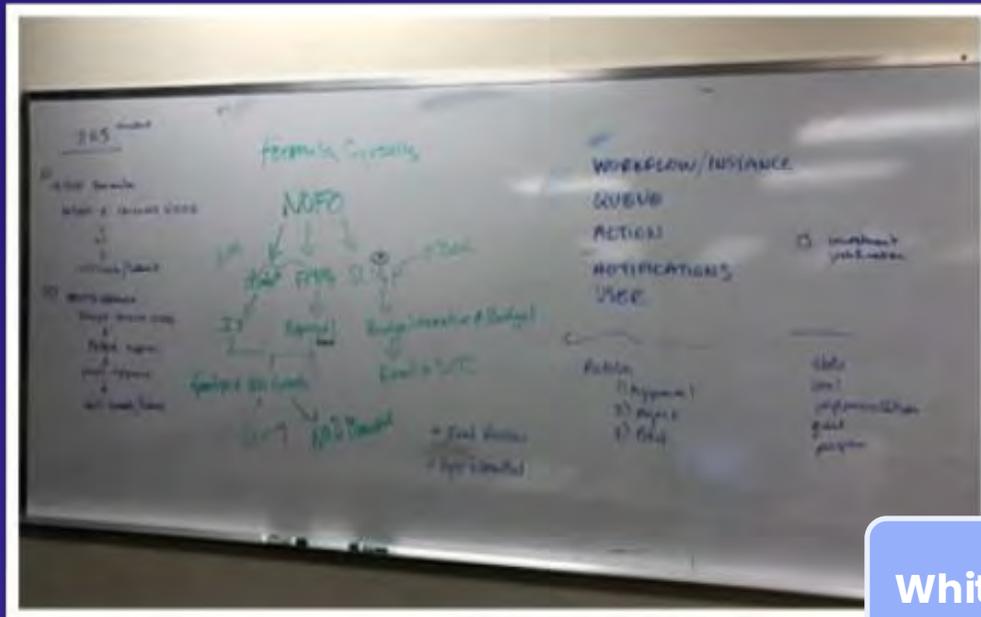
Documentation, in the real world



Best Practices for Implementing and Communicating Change

Preparing to Change

Documentation, in the real world



Whiteboard...
or "notes"

Configuration
Worksheet

System

Best Practices for Implementing and Communicating Change

Preparing to Change

1. Identify Key Stakeholders & Ancillary Systems

- Identify and document each stakeholder, the associated systems they use, and why each person and system are involved.
- Are the right people involved? Are they using the most effective tools?

2. Look for weaknesses, redundancies or inefficiencies

- (Re)design ideal processes for efficiency.
- Consider supportive technology to help you make your program efficient.

3. Realign processes with mission, document, and communicate why changes are needed to all stakeholders

Best Practices for Implementing and Communicating Change

Manage and Sustain Change

- **Clear communication**
 - Communicate frequently and openly
- **Stakeholder engagement**
 - Engage with front-line employees
- **Dedicate resources to drive change**
 - Provide necessary training and support
- **Integrate change management activities with project management**
 - Understand technical plan through intentional approach
- **Provide feedback and continue to iterate**

3. Tangible examples to help bridge the gap between project management and change management



Project and Change Management

Both play critical roles in change success.

Project management focuses on the technical side of change, and **change management** focuses on the people side of change.



Project and Change Management

- Add change management activities to the project plan
 - Align change plans with project plans
 - Document all change management activities
- Work collaboratively with the project team
 - Combine or assign responsibilities and roles



Align change plans with project plans

The image displays a project management interface. On the left, a list of tasks is shown with their status. An orange arrow points from the task 'Task 4 - Grantee Training Materials and Change Management Plans' in the list to a detailed view of the same task on the right.

ID	Description	Status
ILAC-713	Board of Higher Education (IBHE)	IN PROGRESS
ILAC-714	IBHE - Implementation Session 1	COMPLETE
ILAC-715	IBHE - Implementation Session Common App Needs	COMPLETE
ILAC-716	IBHE - Implementation Session Transition Plans	PLANNED
ILAC-717	IBHE - Implementation Session 4	NOT YET STARTED
ILAC-718	IBHE - Implementation Session 5	NOT YET STARTED
ILAC-719	IBHE Task 1 - Award Configuration, Grantee Training, Payment...	COMPLETE
ILAC-720	IBHE Task 2 - Exchange for 3 Funder Training Sessions	COMPLETE
ILAC-721	IBHE Task 3 - NSG Agreement/Contract Workflow	COMPLETE
ILAC-723	Task 4 - Grantee Training Materials and Change Management...	COMPLETE
ILAC-725	IBHE Task 5 - Budget Transfers and UGA Amendments	COMPLETE
ILAC-976	IBHE - Budget Transfers and UGA Amendments Requirement...	COMPLETE
ILAC-977	IBHE - Budget Transfers and UGA Amendments Workflow an...	COMPLETE

Task 4 - Grantee Training Materials and Change Management Plans

Description

Task 4 - Grantee Training Materials and Change Management Plans

Amplifund draft narrative training documents with step-by-step instructions for the performance and financial task supplemented by short videos per topic.

Documentation will cover both EDH and NSG programs under the assumption that most processes will align. Documentation will be separate to have program-specific information.

Amplifund will provide structured recommendations to formalize the change management surrounding a new GMS implementation. This will include draft emails to be shared with Grantees explaining/reminding them of the new process for the NSG program.

Details

Assigned: Thomas Colgrove
Assign to me

Reporter: Tehar Small

Priority: Medium

EMO Reference: None

Category: None

Completion Date: Mar 19, 2024

Parent: ILAC-713 Board of Hq...

Recurring Task: None

Document all change management activities

Communicate – early and often

Internal Communication

Upcoming meetings

- Task 1 - Award Configuration/Grantee Training/Payment Request Workflow and ERP
 - NSG Office Hour is scheduled for 3/7/24.

Urgent Needs

- AmpliFund intends to deliver the updated Grantee Training Materials referenced in Task 4 by the end of the day on 3/5.
 - If there are any questions about the training material, we can set up a 30-minute review session for Wednesday morning. Please reply all with your availability for a 30 min tentative review session on 3/5 between 9 AM - 12 PM CST.
- AmpliFund intends to deliver the Award Configuration checklist to Ashley Stewart for Common App Awards by 3/15.
 - This list will include Lead Recipients, Funds, Award Creation, Award Settings, Performance Plan, Budget, Tips and Tools.

AmpliFund Recommendations

The tasks below are listed in the order they should be completed based on programmatic timing.

Task 4 - Grantee Training Materials and Change Management Plans

- AmpliFund draft narrative training documents with step-by-step instructions for the performance and financial tasks supplemented by short videos per topic.
- Documentation will cover both ESH and NSG programs under the assumption that most processes will align. Documentation will be separate to have program-specific information.

Work collaboratively with the project team

- Incorporate change management activities within internal project management documentation
- Coordinate expectations within project / implementation team
- Document requirements for external communication

Communicate – early and often

External Communication

Reminder: Change Management is about the managing the people side of change

- Set clear expectations
- Provide adequate training
- Demonstrate available support
- Show the benefit of the change
- Thank your participants

Hello Grantees!

The next phase of your FY24 Nursing School Grant is coming up!

This past fall, you submitted applications for the FY24 NSG program. This was the grantees' introduction to IBHE's transition to AmpliFund for their grants management processes. Post-Award activities are in full swing, and this aligns with your next usage of AmpliFund.

Expectations for Grantees in AmpliFund

Grantees will utilize AmpliFund to submit their post-award reporting requirements for both performance and financial needs.

- Performance: entering achievements, submitting reporting periods, and BHE required reporting documentation
- Financials: entering expenses, submitting reporting periods, and submitting a Payment Request with deliverable documents

The types of reporting are similar to past awards with IBHE, the avenue to submit those is new. We know that a change in systems and processes can be hard, but we're here to help.

Live Office Hour tomorrow!

Grantees are welcome to join a live Office Hour session with AmpliFund and IBHE on Thursday, March 7 from 11:30am-12:30pm CT. This Office Hour will include some light training, and then allow for grantees to ask any questions, and review the new set of documentation available. Zoom link here: <https://ampliFund.zoom.us/j/86478644753?from=addon>.

Documentation and Ongoing Support are available.

After the session, we will share a recording, detailed step-by-step instructions will be shared and videos with targeted chapters to let you watch quick snippets instead of filtering through an hour-long session. Additionally, all grantees have access to the Illinois AmpliFund Support Portal that includes toll-free phone support, ticket management, and all product documentation.

What AmpliFund means to YOU

The State of Illinois is rolling out AmpliFund across thirty+ grant-making State Agencies. AmpliFund takes standardization in the grantee portal and uniform grant agreements, and other statewide reports, even further – we offer one platform that Grantees can report back consistently within single Agencies (like ESHI & NGS), and across State Agencies (like IBHE and ICCB). Over time, this streamlines more processes for Grantees and provides that single location for all Statewide grant reporting.

Thank you.

We appreciate you jumping in with the NSG grant. Reports are due to IBHE March 31. Thursday is a great opportunity to get support in advance of the deadline. We hope to see you there – and we'll be checking back in later this month with more opportunities for support.

Wrap Up



Change Management

Keep it Super Simple

- Identify who you need to communicate with
- Establish a strong communication plan
- Ensure you are focusing on the impact of change
- Provide training, tools, time, and resources
- Be mindful, and honest!



Questions?



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Thank you!

Let's reach for the stars!

