"We're Moving Your Cheese!"

Communicating IT Change

Academic Web Technologies
Office of Information Technology
University of California, Irvine

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User Experience Architect

Session Agenda

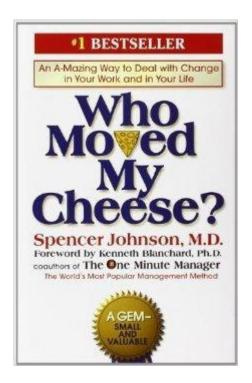
- General Introduction
- Getting Ahead of the Message
- Developing a Communication Strategy
- Executing a Communication Strategy
- How'd It Go?
- Questions

General Introduction



What is "moving cheese"?

- A parable about change
- Change takes many forms
- Change is necessary
- Change impacts users



Why should we care?

- Acceptance
- Buy-in
- It's the right thing to do

Takeaways

- Who
- What
- How
- Our mistakes

Our case study: LMS Transition

- Small dev team
- Beloved, but aging, homegrown Learning Management System (EEE)
- Campus-wide impact if changed
- Two projects, one approach
 - o I-year Pilot
 - Multi-year transition

Guiding Principles

Challenges

- o Controversial, poorly understood, easily confusing
- Anxiety and resistance
- o "But..."

Goals

- Transparency
- Unified and consistent
- Clear and complete
- o Retain trust

The Communications Team

Tips

- Whole lifecycle
- Writing, speaking
- User focused

Our Team

- Project Initiator (Briandy)
- Development Team Manager (Kelsey)
- Development Team User Experience Architect (Ray)

Getting Ahead of the Message

The Pre-strategy Strategy

- Craft a "change is coming" message
- Identify obvious initial audiences
- Proactively engage ahead of the project

The Pre-strategy Strategy

Content

- Explain "why"
- Demonstrate thoughtfulness
- Be honest about impacts

Format

- Concise
- Mostly Q&A

The Pre-strategy Strategy

Pros

- Promote inclusiveness, transparency
- Identify champions
- Uncover concerns
- Get intel for messaging

Cons

• The game of "telephone"

Developing a Communication Strategy

Process

- Define goals
- Audience discovery & definition
 - a. Brainstorm audience list
 - b. Define attributes of audiences
 - c. Group like audiences together
 - d. Refine audiences
 - e. Combine and continue to refine audiences
 - f. Outline audience communication methods & concerns
 - g. Decide upon communication frequency

Suggested Working Style

- Collaborative with 2 or 3 people
- 10-20-10-20 active working meetings:
 - 10 minutes to review and plan the next 50 minutes
 - 20 minutes of independent work
 - I 0 minutes to collaborate and discuss
 - o 20 minutes of independent work
 - o 2 minutes to plan next meeting (put this in your calendar invite)
- Use collaborative software (we used Google spreadsheets)

Establish Goals

- Come up with a few goals for your communication effort
- Refer back to these goals constantly
- Example from LMS Transition:
 - Promote on-going engagement in the entire learning technology ecosystem.
 - Increase the opportunities for ensuring that this is a cooperative effort.
 - Build confidence & understanding around decisions through transparency and demonstration of responsiveness.
 - Inform expectations through education.
 - Reduce fear and misunderstanding.

1 - Brainstorm audience list

- Brainstorming, aka "The Kitchen Sink"
 - O Who and why?

Refine

- Importance (critical, somewhat critical, or n/a)
- Communication so far (effective, not effective)
- Perspective (unaware, resistant, neutral, supportive, leading)

Rank

- I = critical to project success
- 5 = impacted, make sure they're aware
- Columns: Who, Why

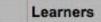


2 - Define audience attributes

- What to think about
 - o **Importance** (critical, somewhat critical, or n/a)
 - **Effectiveness** of communication so far (effective, not effective)
 - o Perspective (unaware, resistant, neutral, supportive, leading)
- Criticality ranking
 - I = critical to project success
 - 5 = impacted, make sure they're aware
- Columns: Importance, Effectiveness, Perspectives, Ranking

3 - Grouping

- What to think about
 - Affinity groupings
 - o General groups with subgroups as needed
 - Naming groups
- Output: Groups, subgroups, and audiences organized appropriately



General Audience

Undergraduate Students

R Graduate Students

Targeted Needs

First Generation Students

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4 - Refinement & Definition

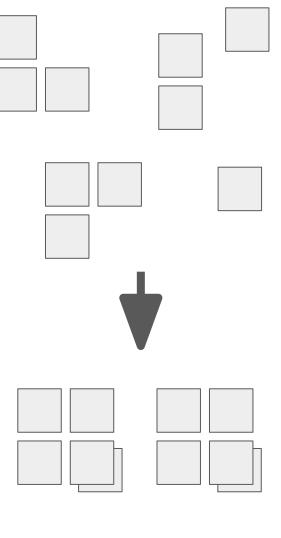
- What to think about
 - O Why is this audience important?
 - O What do we want from this audience?
 - How should we communicate with this audience?

Tips

- On't worry if you think of new audiences; just add them
- O Don't worry if you discover similarities; keep grouping things together
- Make liberal use of the "Hide column" feature in your spreadsheet app
- Output: New columns: Why important, What we want, Tone

5 - Combine & Refine

- What to think about
 - Is this audience still important?
 - Is this audience categorized appropriately?
 - Goal is to create a manageable, focused list of audiences
- Tips
 - Either delete or move audiences away
 - Merge as needed
 - Keep a consensus mindset when considering removing entries
- Output: A more focused, manageable list



6 - Communication methods &concerns

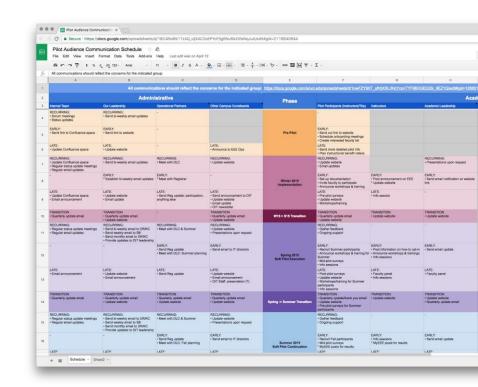
- What to think about
 - What are likely the key concerns for this audience with regard to this change?
 - What are typically the best ways to reach this audience?
 - How frequently should we engage this audience given the various channels?
- Tips
 - This can get tedious, so don't do it all at once
- Output: Columns: Probable concerns, Preferred communications mechanisms

7 - Frequency

- What to think about
 - How frequently should we talk to this audience?
 - Should the frequency vary based on communication method?
- Tips
 - Consider multiple frequencies based upon communication method
 - This can get tedious, so don't do it all at once
- Output: Columns: Frequency

The Whole Enchilada

- Who
 - Priority audiences
 - And everybody else
- Why
 - Helpful especially later, when you don't remember why an audience is listed
- How
 - Methods and frequency of communication
 - Contents of communication
- Tone
- Then, you can synthesize the data into an actionable form, such as a <u>quarterly</u> <u>calendar</u>



Templates & Assets

http://sites.uci.edu/el6uci/cheese/

- Presentation deck
- Blank templates (Google spreadsheets, but easily imported into Excel)
- Outline/template of the plan outlined in the previous slides

Executing the Communication Strategy

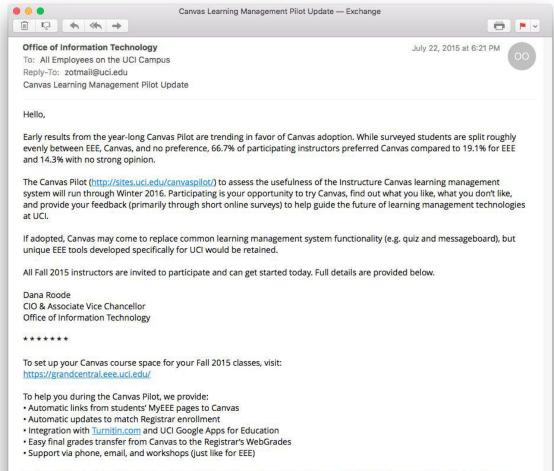


Execution Planning

- Implementing based on development
- Mapping to project phases
- Scheduling



Emails





Canvas is a popular LMS used within the UC system and by other research universities nationwide. It features useful tools and services (Examples: student group management, multimedia embedding, rubric & outcome-based grading features, seamless gradebook integration across the toolset) and offers future opportunities to integrate third-party tools.

Workshops

- In-person group training sessions
- Multiple approaches: broad vs.
 - topic-focused
- Low attendance
- High efficacy
- Handouts

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UCI Canvas Pilot Quick Reference

I need to	Canvas Tool(s)	Page Number
Publish course information in a syllabus	Syllabus	2
Provide content in a webpage like format	Pages	2
Embed a video into a page	Rich Text Editor	1
Organize course materials	Modules	6
Begin an asynchronous conversation	Discussions	7
	Inbox	6
Begin a synchronous conversation	Conferences	8
	Chat	8
Conduct online office hours or web conferences	Conferences	8
Collect files from students	Assignment	5
Provide feedback on an assignment	SpeedGrader	4
Distribute files to students	Files	3
	Pages	2
Record who is present in class	Attendance	10
Conduct a survey	Quizzes	4
Conduct a quiz	Quizzes	4
Create weighted categories in a gradebook	Assignments	5

Important Note

Always be sure to publish the materials in your Canvas course space. Students will not be able to access items that are unpublished.



Indicates an item is unpublished



Indicates an item is published

Text Editing Tools

Format content throughout your course space

Panels



Postcards

- Send to -all- eligible instructors (~1,200)
- Surprisingly affordable!
- Surprisingly effective!



Training Sessions

What's New with Canvas?

The What and Why of Canvas Tools

Canvas Strategy Session

Assessment & Grades within Canvas

Explore Canvas in Action

Don't see something you want to learn more about? Let us know and we'll personalize a training session for you!

Learn more about using EEE Canvas

The EEE Team is here to help!

We offer:

- Self-service help: https://help.eee.uci.edu/
- Personal consultations (phone or in-person)
- Scheduled training sessions
- Customizable workshops for your program or department

Sign up for workshops or learn more:

http://sites.uci.edu/canvas/

EEE Canvas

UCI is adopting Instructure Canvas

Following the 2015–16 UCI Canvas Pilot, the campus is adopting Canvas.

Get started with Canvas for your classes:

- 1) Go to https://grandcentral.eee.uci.edu
- 2) Create a course space
- 3) Start using Canvas! EEE tools will remain available for your course

Learn more about Canvas: http://sites.uci.edu/canvas/

Learn how to use Canvas: http://sites.uci.edu/canvas/learn/

Executive Reports

- Biweekly to director
- Monthly to ClOs
- Easy to assemble from wall calendars
- Aligns on message
- Provides leadership with shareable info

□ 01/15 Biweekly Executive Status □ Ray Vadnais □ 1/16 Biweekly Executive Status □ Ray Vadnais □ 1/16 Canvas Weekly Status □ me □ 1/23 Canvas Weekly Status □ me □ 1/29 Monthly Executive Status □ me □ 1/30 Biweekly Executive Status □ me □ 1/30 Canvas Weekly Status □ me

My Drive > * Canvas Pilot Master Folder > Status Updates

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Canvas Pilot Quarterly Update Winter 2016

UCI's year-long Canvas Pilot kicked off March 30th, 2015, with the start of Spring instruction. The Canvas Pilot is an opportunity for instructors, teaching assistants, and students to use Canvas in their courses and participate in a formal assessment of the value and usability of Canvas as a potential addition to the instructional technology ecosystem at UCI.

The Winter 2016 quarter concludes the Canvas Pilot. The final, unique participant counts for the pilot come to: 505 instructors, 642 teaching assistants, and 22,570 students.

Throughout the pilot, assessment results have indicated strong Canvas adoption support from participating instructors, as well as a preference for Canvas (albeit less pronounced) from teaching assistants and students. Given the strength of the results, the two faculty & staff committees tasked with producing a recommendation for next steps, the Learning Management Systems Future Directions Review Team (which approved the pilot to initially) and LMS Advisory Group, both issued recommendations to proceed with adoption.

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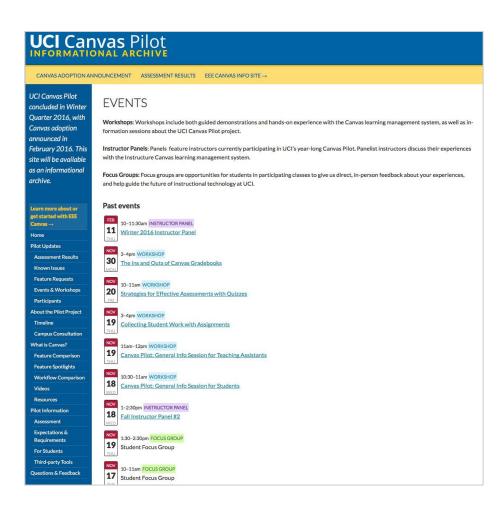
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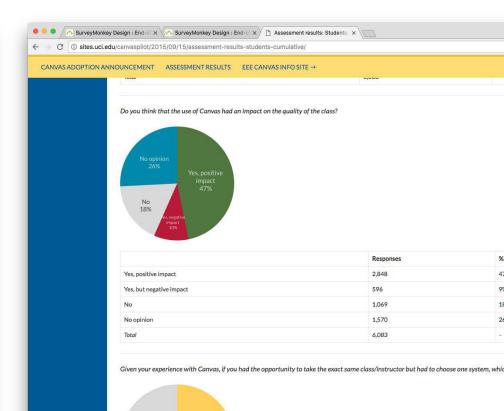
Info Sessions

- Separate sessions for audiences: students, TAs, instructors
- Poor attendance
- Some misunderstanding of purpose, content - we were flexible
- Good feedback from those who did attend
- Able to show we offered multiple ways to learn about the project



Surveys

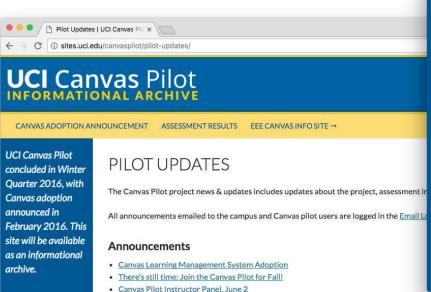
SURVEY PREVIEW MODE] End-of-quarter Survey for Students	EEE, what do you dislike about Canvas? EEE, what do you dislike about Canvas?		
$Survey Monkey Inc. \ [US] \ \ https://www.surveymonkey.com/r/Preview/?sm=XIS4eUHIP9uO4hcKxmW5Zdr4VdQ4nSAGU5zPkP8be_2Fy_2Mproved to the complex of the comp$	2B		
Casy to use			
2. As serviced to EEE what do you like about Convers			
3. As compared to EEE, what do you like about Canvas?			
4. As compared to EEE, what do you dislike about Canvas?			
5. Do you think that the use of Canvas had an impact on the quality of the class?			
Yes, and Canvas had a positive impact			
Yes, but Canvas had a negative impact			
○ No			
○ No opinion			
6. Given your experience with Canvas, if you had the opportunity to take the exact same			
class/instructor but had to choose one system, which would you choose?			
○ EEE			
Canvas			
O Doesn't matter to me			
The state of the s			
7. Please indicate which of the following you used to access Canvas during this quarter.			
Laptop or desktop computer			



Project Website

http://sites.uci.edu/canvaspilot/

Archived, but still available as a resource to us and anybody else interested in our pilot





CANVAS ADOPTION ANNOUNCEMENT

ASSESSMENT RESULTS

FFF CANVAS INFO SITE →

UCI Canvas Pilot concluded in Winter Quarter 2016, with Canvas adoption announced in February 2016. This site will be available as an informational archive.

Learn more about or get started with EEE

Canvas → Home

Pilot Updates

Assessment Results

Known Issues

Feature Requests

Events & Workshops

Participants

The Office of Information Technology, in collaboration with units across campus including the Distance Lea learning management system in 2015 - 2016. This pilot expands the existing EEE offerings through a comincreased call for third-party integration and other enhancements, without compromising EEE's unique fun campus needs.

UCI Canvas Pilot Timeline

2015

Winter	Spring	Summer	
Integration w/			
campus systems	Invite-o	only pilot	

Why is UCI doing a Canvas Pilot?

The Canvas Pilot is the campus's opportunity to evaluate the Instructure Canvas learning management system and determine its viability as a supplemental instructional technology offering. Throughout the Canvas Pilot, OIT will be distributing a variety of assessment surveys, conducting workshops and trainings, and inviting students to participate in focus groups.

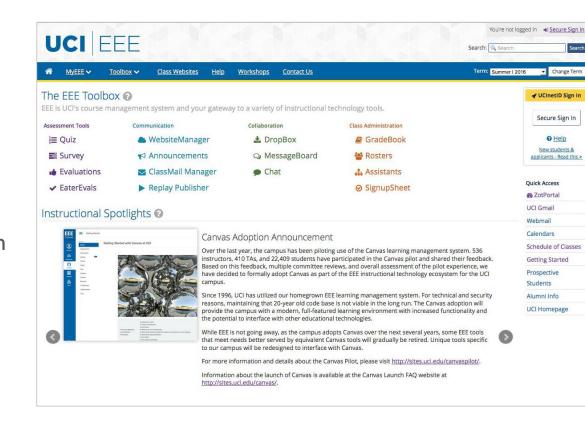
Assess Full Pilot (

Each quarter, all Canva TAs) are asked to subm end-of-quarter survey Canvas or EEE. This gra question.

Canvas Pilot Instructor Panel, May 6
Electronic Educational Environment EEE Plans

The Site Itself

- Meet folks where they are
- History tells us the homegrown LMS homepage is an effective communication mechanism
- Short & sweet, link to detail



The Site Itself Today

- Updated to make information front and center
- FAQ can adapt to changing campus questions and needs
- Diagram illustrates the vision for the future
- Conversational tone to convey trust



What did we learn?



Lessons Learned

- Can't communicate too much or too early (but there will be gaps)
 - Postcards surprisingly effective; think outside the box
 - Communication is user experience
 - Get feedback on content early and often
 - Involve the right people and skillsets
- Don't neglect internal communications (but also don't overwhelm)
- Take advantage of tools: 20-10-20-10 meetings, Google Drive, Trello, etc.
- Build in review & iteration -- challenge processes
 - Website content always in flux/change/adapt/etc.
 - Don't be complacent!

Questions?

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Deck & templates: http://sites.uci.edu/el6uci/cheese/

