Data & Change Management

Transition Readiness for the Downtown Campus Center
Business and Financial Strategic Initiatives: BFSI

- Organizational Development
- Project Management
- Portfolio Management
What is Change Management?

- Preparing and supporting individuals to successfully adopt change in order to drive organizational success.
Where does “data” fit in? Strategic planning for the human side of change

• Who/where are we now?
• What are the challenges?
• What are the opportunities?
• What do we need to address to be successful?
• Was the change successful? What do we need to focus on after the project is completed?
Transition Readiness Assessment
Downtown Campus Center and Change Management
Project Background

- Centralized administrative staff location
- Downtown Merced
- Budget and space constraints
- Activity based programming
- Transition readiness assessment done by Deloitte Consulting LLC, Fall of 2015
**Data Collection Overview**

We interviewed and/or surveyed nineteen Departments to understand the technical needs and cultural environments of the Departments.

<table>
<thead>
<tr>
<th>Group</th>
<th>Interview Date</th>
<th>Interview Participants</th>
<th># of Survey Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPO</td>
<td>11/09/15</td>
<td>Gregg Camfield, Rosemary Salazar, Michelle Snyder</td>
<td>6*</td>
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<tr>
<td>BAS- Actng/ Bus Services</td>
<td>11/09/15</td>
<td>Michael Riley</td>
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<td>BAS- ACT</td>
<td>10/22/15</td>
<td>Tony Smullen</td>
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<tr>
<td>BAS- Design &amp; Construction</td>
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<td>BAS- HR</td>
<td>11/12/15</td>
<td>Brian Powell</td>
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<td>BAS- Payroll/ Fin Mgmt./ Ins</td>
<td>11/09/15</td>
<td>Michael Riley</td>
<td>5*</td>
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<tr>
<td>BAS- Procurement</td>
<td>11/09/15</td>
<td>Michael Riley</td>
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<tr>
<td>BAS- Strategic Facilities/ BFSI/ Business and Admin Services</td>
<td>11/03/15</td>
<td>Andrew Boyd, Sonia Johnston, Colleen McCormick</td>
<td>7*</td>
</tr>
<tr>
<td>CO- Comms and Govt Rels</td>
<td>11/02/15</td>
<td>Cori Lucero, Patti Waid</td>
<td>12</td>
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<tr>
<td>CO- Internal Audit/ Policy/ EEO</td>
<td>11/09/15</td>
<td>Jody Gonzalez, Sheryl Ireland, Todd Kucker</td>
<td>6*</td>
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<td>IT- Campus Tech, Research Computing</td>
<td>11/03/15</td>
<td>Ann Kovalchick, Peter Deutsch, Nick Dugan, Al Espinoza</td>
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<td>IT- Executive/ Admin</td>
<td>10/27/15</td>
<td>Ann Kovalchick, Peter Deutsch, Nick Dugan, Al Espinoza</td>
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<td>IT- Security, Core and Apps</td>
<td>11/03/15</td>
<td>Ann Kovalchick, Peter Deutsch, Nick Dugan, Al Espinoza</td>
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<td>OPB- Finance/ Planning &amp; Budget</td>
<td>11/03/15</td>
<td>Donna Jones, Veronica Mendez</td>
<td>6*</td>
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<td>OPB- IRDS</td>
<td>11/03/15</td>
<td>Nancy Ochsner</td>
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<td>OPB- Real Estate</td>
<td>11/03/15</td>
<td>Abigail Rider</td>
<td>5*</td>
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<td>Off of Research</td>
<td>11/02/15</td>
<td>John Jackson, Autumn Tjalsma</td>
<td>12</td>
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<td>Student Affairs</td>
<td>11/02/15</td>
<td>Brian Gresham, Tammy Johnson, Encarnacion Ruij</td>
<td>7*</td>
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* Please note some Departments have a small sample size, results for these groups should be interpreted with caution.
Example of questions asked

- “How paper-based are the processes or activities you use on a regular basis?”
- “Is it important to have a workspace that I can call my own?”
- “Does your work handle sensitive information?”
- “Does noise have a negative impact on your work?”
- “My team has the knowledge and skills to do their job differently”
- “What concerns you the most about moving to the Downtown Center?”
- “Would you mind having to possibly switch technology so everyone could be on the same computer system?”
- “Does your job require you to make a lot of phone calls?”
Technical and Cultural Challenges

Paper-based processes, confidentiality/sensitive issues, noise, and workspace needs will be the biggest challenges to overcome.

- 30% say they work in extremely or very paper-based processes
- 43% often store or access paper files around their desk
- 21% say they have special storage needs
- 27% have non-paper materials that need storage around their desk
- 49% say they have sensitive or confidential material in their workspace
- 57% say their work involves sensitive topics non-paper materials that need storage around their desk
- Throughout the interviews, managers were concerned about space for private and/or performance related conversations
- 64% of staff don’t have standard computer technology throughout their Department
- 84% want their own regular, individual workspace
- 13 of 19 Departments rate having the same desk everyday as a top priority
- 67% say that noise negatively impacts their work
- 61% say that those who are loud should move to not disturb others
- 64% say that a lot of people walking by them will negatively impact their work
- 82% say they don’t work from home on a regular basis
Transition Preparation Recommendations
Sixteen different initiatives are recommended to address the technical, cultural, and project management challenges that have been identified

**Technical**

1. **Paper**
   1.1 Conduct Assessment of Paper Files
   1.2 Identify BPR opportunities for Paper-Dependent Processes
   1.3 Develop Business Case for Electronic Document Management System

2. **Confidentiality / Sensitivity**
   2.1 Conduct Assessment of Confidential / Sensitive Data

3. **Technology**
   3.1 Develop a Business Case for Technology Standardization

4. **Workplace Options**
   4.1 Create On-Campus Mobility Space

5. **Work Environment**
   5.1 Develop a Location Safety Plan
   5.2 Develop a Transportation Plan
   a. Transportation
   b. Parking

**Cultural**

1. **Communication**
   1.1 Develop Communications Program
   a. Develop a Comm. Strategy
   b. Deliver Messages via Managers
   c. Build a DTC website
   d. Conduct Regular Info Sessions
   e. Create a Change Network

2. **Engagement**
   2.1 Implement a DTC Engagement Program
   a. Develop a Staff Engagement Strategy
   b. Create Mock Workstations
   c. Schedule DTC / Neighborhood Relationship Building Sessions
   d. Conduct DTC Tours

3. **Culture Building**
   3.1 Develop New Cultural Norms for DTC
   a. Community Council
   b. Campus Community Presence
   c. Leadership Presence

4. **Training**
   4.1 Create Training Programs for the Transition
   a. Technology
   b. Workplace Culture
   c. Managing in a New Environment

5. **Work Environment**
   5.1 Expand and Promote AWS

**PMO**

1. **Project Management**
   1.1 Develop a Comprehensive Transition Plan
   1.2 Form a Project Management Office
   1.3 Create a DTC Governance Structure

How do we improve the transition to the DTC?
Recommendations Into Action

- Business Process Transformation
- Technology Team
- Confidentiality/Sensitivity Team
- Downtown Culture Team
- Downtown Center Engagement Team
- Downtown Center Communications Team
- Downtown Center One-Team
- Downtown Center Training Team
“I want you to find a bold and innovative way to do everything exactly the same way it’s been done for 25 years.”