Change at St Andrews

Fin Miller: Change Manager

Why change?

HE faces some challenges

- Fragmentation (for example data management).

- Devolved control (for example budget).

- Complexity (for example IT supporting schools, units and commercial services).

- Funding (for example REF).

Why change?

HE faces some opportunities

- Estate (for example conference facilities).

- Physical assets (for example IT outsourcing deals).

- Intellectual property (for example patents).

- New markets (for example online education).

Why change?

HEIs are not great at differentiation

- Where does the institution derive its identity?
- Where does it invest the most and receive the greatest return?
- What is the University's unique core business?

By focusing on characteristics that are distinctive and channelling resources to develop these, universities can greatly impact their performance.

IT Services

What is change?

- Change is continuous improvement - as opposed to BaU.

- Delivered via projects of varying size, nature and complexity.

- Fundamentally, it is the means by which a business adapts what it does in order to meet the challenges of its competitive environment.

Project definition

- A project is a temporary endeavor undertaken to create a unique product, service or result.

  - It is **temporary** in that it has a defined beginning and end in time, and therefore defined scope and resources.

  - It is **unique** in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal. A project team often includes people who don't usually work together.
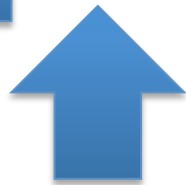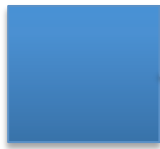
The change sliding scale

Iterative/daily
Local impact

Large scale
Institutional impact

Project

IT Services

Our approach to Change

- For small, iterative improvements
  - Lean lense – remove waste (muda, mura, muri) and increase value from the customer's perspective
  - Spend no money
  - Implement daily kaizen structures
  - Visual management
  - Improvement time
  - Culture of change
  - Develop skills through organisational development

The change sliding scale

Iterative/daily
Local impact

Project management
overhead justified

Large scale
Institutional impact

Project

IT Services
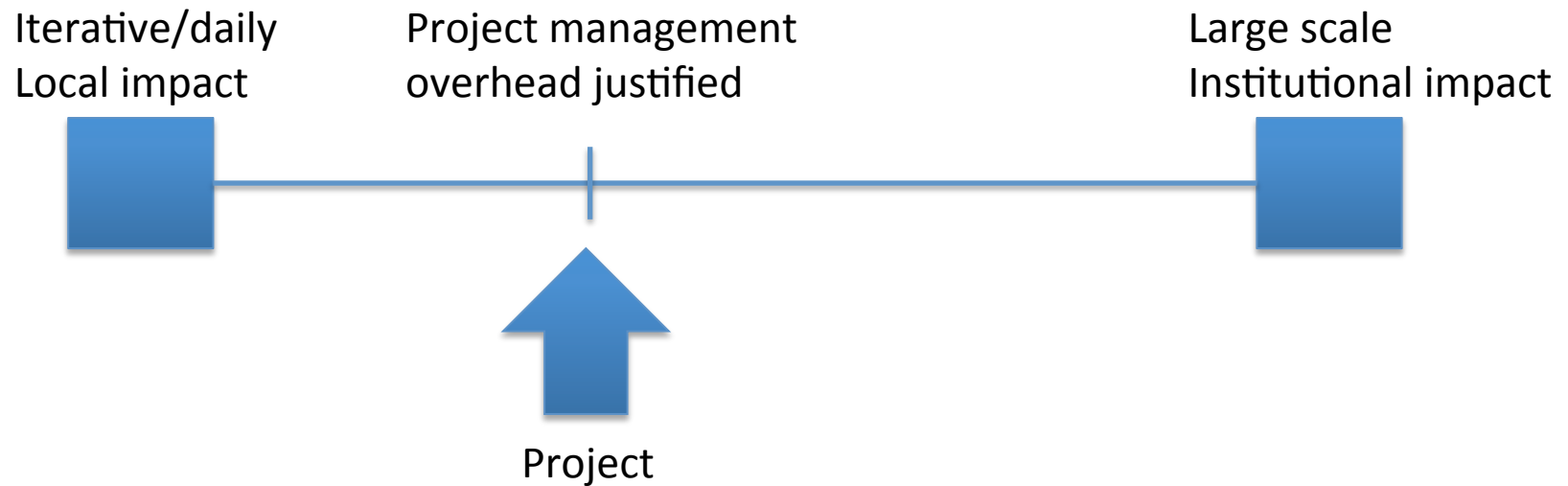
Our approach to Change

- For large scale projects
  - A prerequisite is deciding at what point along the sliding scale a project requires formal project management.
  - Criteria for making this decision could include:
    - Impact
    - Resource
    - Expenditure

1ˢᵗ discipline – analysis

- The first step is to analyse the problem/opportunity.

- While for daily improvement:
  - This may be a quick subconscious mental calculation
  - Or be defined in short conversations with other colleagues

- For large scale:
  - This analysis should be more in-depth
  - The areas we consider, however, will remain the same (e.g. BOSCARD)

1st discipline – analysis

- Analysis takes us through various stages/gates:
  - Idea
  - Terms of Reference
  - Business case
- It helps us decide if a project should go ahead and if so, with what approach:
  - Agile
  - Waterfall
  - Lean

1st discipline – analysis

- It helps us:
  - Fully define and test the idea.
  - Ensure all relevant stakeholders/users are engaged.
  - Create strong foundations for project approval and delivery, supporting:
    - A solution that deals with the problem/opportunity
    - A plan for delivering the solution

2nd discipline – project management

- The second step in the lifecycle is project management.

- For daily improvement this will most likely take the form of self management.

- But for large scale it is likely to involve a portion of a dedicated person's time and the use of an established approach.

# 2nd discipline – project management

- Project management moves us from Business Case through to deployment and benefits assessment.

- It helps us:
  - Create robust plans and schedules
  - Communicate between project governance, business representatives and solution devs
  - Manage risks and issues
  - Motivate teams
  - Replicate the clarity of purpose and of structure that sits around BaU

PDCA

- For both iterative/daily and large scale change/projects, Deming's cycle applies.
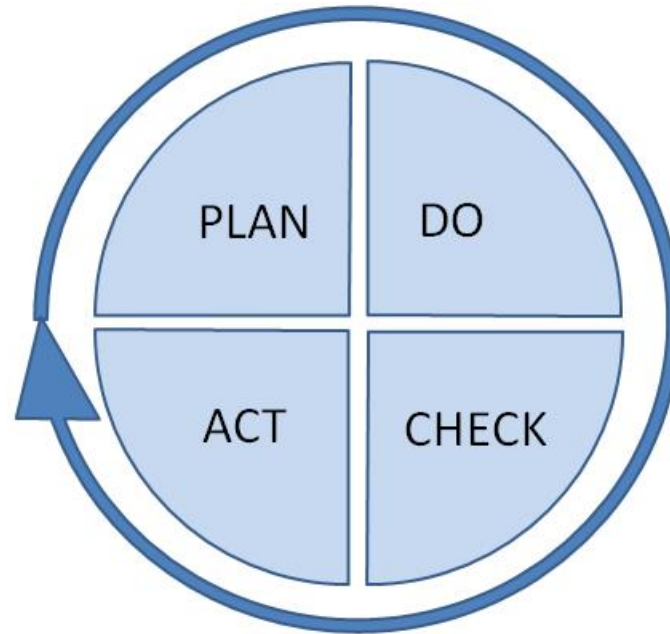
3rd discipline – change management

- Within typical HEI structures, broad change cannot be mandated as it is in a corporate setting.

- Instead change on a large scale can only be achieved by working with faculty to build a compelling case.

- Change management is specifically focused on bringing key stakeholders on-board and creating the momentum for change.

3rd discipline – change management

Kotter's 8 steps is one theory.

Governance is key

- For daily iterative change, governance is local and follows the Toyota model:
  - Supervisor (80%)
  - Team leader (20%)
  - Operator (5%)
- For large scale change, governance is institution wide and ensures (amongst other things):
  - Portfolio visibility
  - Portfolio is in line with capacity
  - Projects aligned with institutional goals
  - The difference between line management and project management is understood
  - Staff engage, as planned, within and across teams

Strategy is key

"People need aligned and purposeful goals alongside the ability to affect change and see progress. Basically, give staff the ownership to innovate but also the feedback mechanisms that show them if their ideas are working. Not forgetting the safety to take risks, make mistakes and grow."

Mike Martyn, Shingo Prize winner

Any questions?