

WIT – ETO Replacement Project

Organizational Change Management Plan for WDA9 – ONE and a Half PAGER

ESD Region: Central Region
 Change Leader: David Gutierrez Betancourt, Regional Change Agent
 Plan Approval Date: January 4, 2023

The South Central OCM Working Group Team:

Roles	Assigned	Primary Responsibilities
Sponsor(s)	Amy Martinez (CEO) Todd Wurl (RD)	<ul style="list-style-type: none"> Endorse OCM plans and activities Provide active and visible sponsorship Communicate directly with employees “Manage management” of affected organizations, help remove roadblocks
Change Manager	David Gutierrez Betancourt	<ul style="list-style-type: none"> Drives change management Develop associated OCM plans Support other roles (Project Sponsor, Project Team, Project Support, Senior Leaders, Managers) Works with project teams, SMEs, and other resources to ensure a successful execution Lead coordination of OCM meetings and planning and reporting activities
Organizational Change Management Team	Meranda Smith (Director) Travis Platz (COO) Jensie Rosenow (ISPC) Jesse Diaz (Sunnyside) Angie Mobley (Yakima) Ariana Cordova (WDC) Dorothy Rocha (PFP)	<ul style="list-style-type: none"> Provide requirements, process, training and communications experience and expertise Contribute specialized knowledge that can help the project and change teams Offer specific tools that support OCM activities
Other	Patricia Padilla (A&P Coordinator)	<ul style="list-style-type: none"> Coordinate & Schedule Meetings

The Plan Details:

Who will be approving this Plan?	Who will be the preferred sender of messages?	How often will the team meet in 2023-2024
The entire OCM team.	WDC = Meranda Smith; ESD = Todd Wurl	Potentially once a quarter as project rollout nears
How will this team share information?	How will this team seek-out feedback?	Why are we replacing ETO?
All-staff meetings/huddles, newsletters, 1:1's, office visits, train-the-trainer, peer-to-peer meetings, email updates	All-staff meetings, office visits, 1:1's, pulse checks	Need a central source of data capture that is accurate and provides strong reporting, with potential for data sharing across partners. Shifting to a more user-friendly interface with more current, intuitive and progressive technology, requiring spending less time with keystrokes and more with time with customers (efficiency), where training will likely be easier.
Strengths South Central	Opportunities Unique to South Central	
<ul style="list-style-type: none"> Knowledge of the current data in ETO, staff understand that data is needed and that we are performance driven. Partnership between WDC and ESD, partners is strong; there is willingness to work together. Adaptability: most likely to encounter the issues, thus solve the issues; Variety of programs; ability to test the waters; exploratory; embracing, getting in front of change (culture). Proactive, effective way to roll this system out (change management) 	<ul style="list-style-type: none"> More opportunities for collaboration; support each other's deliverables and outcomes. Meet customers where they are (literally, physically); connection sites; representation at connection sites. Identifying new opportunities. Work beyond WIOA programs; nimble enough to leverage with other programs; wrap-around services. 	

Perceptions, Risks and Concerns

The team discussed and agreed on various perceptions, risks and concerns impacting this project, including:

- What excites us about this upcoming change
- What concerns we have about this upcoming change
- What resistance we anticipate having with this change
- The risks or consequences of not making this change
- Any gaps that need to be identified

What Will Success Look Like?

- Access to the data, in a usable format
- Less burden in the documentation process
- User-friendly platform that gets us the information we can use/we need
- Will start winning people over once they get to touch and feel the new product
- Ability to make useful, accurate decisions on processes, on how the system operates, using the data on how we do business.
- Functionality for all users, regardless of program
- Make sure the users feel heard, their feedback embraced
- Customer experience is seamless, almost as if no system is present
- Less time looking at keystrokes, more at the customer's face
- System integration, removes repetition

ADKAR Methodology and Planned Steps to Support Change in South Central:

Awareness	Desire	Knowledge	Ability	Reinforcement
<ul style="list-style-type: none"> Multiple orientations and trainings Guinea pigs, “work groups” or breakout groups. Pulse checks to gauge staff understanding Strategic communications, avoiding overload or over communicating Posters that ETO is being replaced 	<ul style="list-style-type: none"> Focus on the positives, a more intuitive system Awards (trinkets, swag) for attending orientations/trainings and being engaged Focus on WIFM Engaging staff in questions like “what top 3 things would you fix in ETO?” Take user input and utilize it (when people see that, 	<ul style="list-style-type: none"> One page of general information Training videos, short and sweet (sound bites) Scheduled trainings and get staff involved for peer-to-peer learning Centralized resource hub with videos, helpful tips, and desk aids (one easy-to-find) TEAMS channel to ask questions 	<ul style="list-style-type: none"> Desk aids Short training videos (beginner, intermediate, advanced) library Recording of training sessions and make them available Knowledge-based test/real case scenario/training environment/muscle memory exercises 	<ul style="list-style-type: none"> Communication and huddles, keep them going, pulse checks How is it going? What are the challenges? What needs to be addressed? Sample auditing, sharing data and what it shows us/tells us, This will acknowledge performance measures and why they matter

<ul style="list-style-type: none"> • At administrator and supervisor level, huddles, staff meetings, all staffs, 1:1's • Heads-up during ETO trainings • TEAMS channel strategic updates and interaction opportunities • Use a common language when discussing this project; need consistency • Newsletter updates • E-mail updates (last resort) 	<p>there's more buy-in, folks feel a part of the change</p> <ul style="list-style-type: none"> • Releasing the fun tidbits of project, building it up along the way, show why they will love replacement. • Use visuals – compare and contrast – new vs current • Highlight the benefits and all the positive talking points, have handouts available 	<ul style="list-style-type: none"> • Town Halls, perhaps play Jeopardy and other games to promote learning in fun way • Ensuring partner meetings across the system; speaking common language • Make it easy-to-use • Layered approach; multiple places to learn the new system; varied methodologies • Encourage people to become early adopters 	<ul style="list-style-type: none"> • Practice with above bullet, determine where more training is required • Identify best users (SME's, change champions, etc.) • Test model for people to practice; non-live environment • Create 'admin' days for learning and practice 	<ul style="list-style-type: none"> • Celebrate milestones and wins, accentuate the positive, give kudos • Identifying gaps • Be positive with messages • Transparency (that we're all looking at it) • Solicit ideas for further improvements (will the new product be nimble enough?) • Refresher/recurrent training or a continuum of learning • Helpful if staff can see 'dashboard' in real-time • Ability to see the wins (qualitative) • Reinforce the quality of what is input; using outputs for coaching purposes, not punitive • Recognize / acknowledge behaviors we want repeated • Share experiences and lessons learned/feedback •
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