ORGANIZATIONAL CHANGE
Task Force Report FY 18-19

TASK FORCE MEMBERS
Jesse Alberti, Housing & Hospitality Services (Co-Lead)
Lisa Kemp Jones, Information Technology Services (Co-Lead)
Cicili Brown, Research Policy & Compliance
Jennifer Catanes-Avanceña, Luskin Conference Center
Constance Daino, School of Dentistry
Doan Hoang, Ashe Student Health & Wellness Center
S. Kumar, Information Technology Services
Kristen Mukae, External Affairs
Cyndia Soloway, UCLA Health IT
Rey Soto, Fielding School of Public Health
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Executive Summary

In 2017, the UC System conducted an Employee Engagement Survey across all UC campuses. The survey, administered by Willis Towers Watson, included a number of categories, such as career development, organizational change, performance management, and work relationships. Based on the survey results, UCLA Staff Assembly and Campus Human Resources identified four priority areas for improvement in the next Employee Engagement Survey. This report will specifically target opportunities for development in Organizational Change.

The survey showed that 65% of UCLA staff is dissatisfied with how the communication of major changes at UCLA have been planned, explained, and executed. Via group discussions, research, and consultation with subject matter experts, the team identified that existing methods of communication at UCLA are inadequate, the main reason being extreme decentralization at the university.

Based on this, the report will detail the team’s recommendations, which are the following:

1. Develop and host a Change Management Toolkit available to all staff as a resource for effectively communicating change.
2. Promote standardized communications protocols and expectations.
3. Sustain an ongoing Change Management Advisory team to monitor short and long-term progress while bringing attention to critical issues.

We believe that our recommendations will bring consistency, timeliness, and accountability to campus communications, ideally alleviating staff dissatisfaction and improving survey scores.
Introduction

“TRANSFORMERS”

We propose that organizational change be seen in the light of “Transformation” as change is not only inevitable, it is essential for progress and growth within a dynamic university environment. In the future, UCLA will succeed and thrive by recognizing that there is a need to TRANSFORM the way our shared campus community implements and communicates change. Our team’s name “TRANFORMERS” is inspired by the vision of UCLA’s future advancement in this area.

ORGANIZATIONAL CHANGE

Organizational Change received a Total Favorable Score of 35, the lowest of the ten categories surveyed in the 2017 UC Staff Engagement Survey. The total favorable score of 35 out of 100 is based on three general statements posed to UCLA Staff. These statements focused on how well the UC System has planned, explained, and executed “recent major” organizational changes across the UC system.

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<th>TOTAL FAVORABLE - UCLA ONLY: Generally, recent major organizational changes across the UC system have been:</th>
<th>2012</th>
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<td>Executed well</td>
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<th>TOTAL FAVORABLE - UC OVERALL: Generally, recent major organizational changes across the UC system have been:</th>
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Due to such a low score, this category has the greatest opportunity for increasing positive changes.
Research and Findings

UCLA’s scores communicate a downward trend overall. Poor communication of organizational change, as seen in the low score, may indicate the need to better leverage valuable university resources to decrease confusion, duplicative or inconsistent efforts, and poor morale.¹

GROUP DISCUSSION

The Organizational Change Task Force was comprised of a broad swath of staff representing units from across campus and from a variety of career levels and tenure. This allowed for great information gathering based on personal reflection and collective sharing of professional experiences. We explored several aspects of communication: methods, levels, and how well communications are distributed amongst the different audiences within UCLA. Specific themes, such as valuing organizational communication in times of change, were repeatedly discussed with stakeholders. The discussion indicated that existing communication methods, or lack thereof, are having a detrimental effect on the morale employees due to frustration in not learning about information in a timely manner and frustration over the time it takes to clear up confusing, duplicative, or inconsistent information.

The Transformers team then went through a Business Model Canvas exercise to identify stakeholders, relationships, and value propositions in developing recommendations. Although not entirely complete, the exercise enabled the team to clarify some basic areas of stakeholder needs and hone some concepts into concrete recommendations.

This analysis led us to our main recommendation, the Boomerang method, which will be discussed later in this report.

CONSULTATION WITH SUBJECT MATTER EXPERT

On November 16, 2018, the Transformers Group met with Rochelle Hardemion-Jackson from the Business Transformation Office at UCLA. This conversation provided ideas about how to improve and change communication. Rochelle mentioned that when trying to understand the best forms of communications, one must pick up on the learning style of the individual. Some individuals prefer outgoing written communications such as email while others may prefer a more audio/visual communication. When vital information is given to UCLA employees, it must be delivered with one message in differing formats, tailored to each audience's needs.

CASE STUDY – MULTI-FACTOR AUTHENTICATION: FIELDING SCHOOL OF PUBLIC HEALTH

The first time Organizational Change Task Force member, Rey Soto, learned about the mandatory use of Multi-Factor Authentication (MFA) for the campus community was
through a BruinTech Brown Bag event. The information had not yet been distributed by his department or school (FSPH). After learning of this information, Mr. Soto contacted the school Dean to inquire about the MFA process and its communication to the FSPH community. The Dean referred Mr. Soto to the Associate Dean of Academic Programs, as she herself had no information regarding MFA. The Associate Dean responded stating she had learned about the MFA requirement that week but “I have not heard or received any detailed information re: what this will entail or what the timeline is.” An official email announcement went out to all FSPH staff, faculty, and students one week after Mr. Soto’s inquiry, four weeks prior to mandatory enrollment for MFA. The following week, a Bruin Post announcement by Associate Vice Chancellor, Andrew Wissmiller, was sent to the campus community with information regarding MFA. These last four weeks prior to the mandatory enrollment and use of MFA became a rush to gain more information by staff, faculty, and students while also contending with the start of the Fall Quarter.

FINDINGS

- There is little standardization of communication practices around UCLA – our recommendations are aimed at reinforcing best practices to encourage standardization
- Communications are often “owned” by the department or unit that needs to communicate the change. This results in inconsistent messaging and different styles of communication based on departmental silos
- Without addressing how change is communicated and ensuring that messages are understood, we are unlikely to see survey scores rise in the future

LIMITATIONS

- Due to time constraints and loss of membership, our team was limited in fully researching the complexities of organizational change.
- Due to time constraints, our team was not able to evaluate Risk Management. We recommend that this should be conducted during stage 1 of the action steps.
Recommendations and Conclusion

We recommend that multiple methods of communications be utilized according to the needs of the message and the audience. We will also address frequency of communications and introduce mechanisms for feedback, accounting for messages being seen and understood by all stakeholders. We recommend developing a toolkit to ensure that managers and staff have access to consistent methods of relaying information around the UCLA community. We also recommend creating a common portal for this information to be housed and maintained over time. This package will ensure that UCLA can successfully deliver essential organizational changes as we move forward.

RECOMMENDATIONS AND ACTION STEPS

1. Create Organizational Change Toolkit
   a. Concrete steps and processes for enabling managers and staff to develop effective communications – review findings from Working Relationships team as a source of future collaboration
   b. The Boomerang method – the Boomerang method is detailed in the Appendix but will ensure messaging accountability when communicating specific ideas to each audience.
      i. The overall concept is to offer managers a framework for sending out messages, gathering feedback and acknowledgement in a deliberate way, and acting on feedback as it comes back to the source.
      ii. For broadly impactful changes, this method may be deployed to provide more detailed monitoring and assessment of message effectiveness.
      iii. A method of accountability and feedback gathering for high-impact changes
   c. Identify or develop an online course for manager/supervisors to focus on best practices for organizational change communication
   d. Identify a portal to house this information and sustain it. Idea: MyUCLA (for staff)
   e. Identify costs and resources required – including the efficiency savings potential
2. Promote Standardization of Communications
   a. Potential easy win: broaden “Deans and Directors” communications to include all staff rather than just management
   b. Include methods of communications, frequency, etc.
   c. Identify organization(s) to be accountable for ongoing development of effective organizational change communications practices
   d. Include steps for onboarding to include being added to an all-staff email list and other lists as applicable
      i. Use “opt-out” strategy.
      ii. Address scholars with programs that aren’t necessarily staff and include them in communications: post-docs, clinical workers, etc.
      iii. Address unique situations for scholars/staff that aren’t on regular payroll and affiliated community members. Work on ways to be more inclusive
   e. Identify costs and resources required – including the efficiency savings potential

3. Develop a Standing Organizational Change Committee
   a. Collaborative sponsorship: Staff Assembly, AMG, BTO, CHR
   b. Address on-going support of recommended practices
   c. Review and prioritize recommendations and resulting actions
   d. Promote culture of adaptability and accountability
   e. Collaborate with different departments to encourage adoption of practices
   f. Identify costs and resources required – including the efficiency savings potential

We predict that by implementing these recommendations over the next two years, between June 2019 and May 2121, we will see an improvement in the total favorable score of how well the UC system and UCLA has planned, explained, and executed recent, major organizational changes in the next Employee Engagement Survey to be conducted in May 2021. Currently, UCLA has a score of 35 out of 100.

These recommendations should be implemented in four stages as shown in timeline diagram below.
STAGE 1
• Compare all the recommendations from Organizational Change Taskforce with other 3 taskforces
• Identify costs and resources required and efficiency savings potential for:
  • An Organizational Change Toolkit
  • Standardization of Communications
  • A Standing Organizational Change Committee
• Broaden “Deans and Directors” communications to include all staff rather than just management
• Identify a portal to house this organizational change information and sustain it. *Idea: MyUCLA (for staff)*

STAGE 2
• Develop a standing Organizational Change Committee
• Conduct assessment and collaborate with Staff Assembly, AMG, Business Transformation Office and CHR
• Recruit board members
• Develop mission statement & objectives
• Include steps for onboarding to include being added to an all staff email list (such as All Staff Picnic Event, Staff Assembly, AMG) and other lists as applicable.

STAGE 3
• Develop Organizational Change Toolkit
• Introduce Boomerang Method
• Identify or develop an online course for manager/supervisors to focus on practical how-to’s for organizational change communication
• Identify organization(s) to be accountable for ongoing development of effective organizational change communications practices
• Identify organization(s) to pilot test the Boomerang Method and the toolkit

STAGE 4
• Launch UCLA Organizational Change Committee
• Implement UCLA Organizational Change Toolkit across all departments
• Promote standardization of communications across UCLA
CONCLUSION

The Transformers Group (Organizational Change Committee) was formed based on the 2017 UC Staff Engagement Survey results. The survey showed that only 35% of UCLA staff believed that major organization changes across the UC system had been planned, explained, and executed well. During the course of the year, this group met biweekly to discuss this finding and pinpoint steps to improve UCLA’s future scores. A pivotal moment for this group was utilizing the Business Model Canvas Exercise to help identify communication missteps due to a lack of standardization at UCLA. Based on the critical analysis of several UCLA-implemented programs and personal experience, this group recommends creating an organizational change toolkit, standards of communication, and building a standing organizational change committee.

The Boomerang Communication Procedure (BCP) was introduced by team member Rey Soto at a Bruin Tech brown bag lunch event in April, 2019. His focus will be on “Bottom up” approach to communicating. Rey is also part of the conference planning team for a joint conference between AMG, Bruin tech and the Staff and Faculty group. He plans to present the BCP as a topic for the conference.
Appendix: Boomerang Communication Procedures

COMMUNICATING INFORMATION

When information needs to be distributed to upper management, colleagues, and supervisees, consider the diverse variables that could impact how the message is received. In short, know your audience before crafting your content in a way that allows for factual comprehension and answer these foundational questions: Who, What, Where, When, Why and How. When answering these questions in the content creation phase, try to anticipate questions from past experience and feedback from your groups. This will get easier with practice, utilizing the Boomerang Communication method because the audience will provide feedback for continuous process improvement.

The UCLA Business Transformation Office (BTO) recommends a minimum of three different formats of a messaging for large scale communications. Emails, flyers, announcements in huddles/meetings, links to websites and video are just a few examples of how to disseminate a message. People learn and retain information differently. It is valuable to consider the visual, auditory and kinesthetic needs of an audience for the most effective messaging.

Alternatively, don’t simply email out the mission-critical information. UCLA is a vast community and email is the most expedient way to reach a mass audience. Unfortunately, there are some issues with exclusively relying on email. To date, we haven’t found one official communication reaches the entire UCLA community through email communications. We have found several big distributers, but they all have areas that they don’t penetrate. Missing some groups entirely can cause people to feel unimportant.

At every level of communication, there must be some degree of human interaction and compassion for the recipient of the message. This allows the communicator to receive quality feedback from the message, translating feedback into knowledge. That knowledge can be the difference between a well-communicated message and just another company announcement. Human interaction can help set the tone and sway the initial response from negative to positive. Personal interaction can assuage fears, reduce confusion, and encourage the audience to spread the message with energy and enthusiasm. These elements are key when packaging all communications. A Boomerang message is
thoughtful, can be delivered in multiple formats, and flexible to utilize across organizations and hierarchy.

COMMUNICATION TIMELINE

Communicate with relevance and provide information in a timely manner. If the message is coming from the top of the ladder, make sure it has enough time to make it to all descending levels while remaining clear and relevant. Announcing a change that takes place in five days but reaches the bottom of one’s group in seven days is simple ineffective communication. Help the process by setting expectations for distribution speed. The expectations you set will also set precedence for the timeliness of a boomerang to return. Too many messages are left to “set it and forget it” mode. Once you have a measure of how fast or slow your information network is, use that as a gauge for releasing other information you wish to disperse.

GUIDELINES FOR REQUIRED RELEASE OF INFORMATION

The average turnaround time for a non-urgent message is five business days for each level that the message needs to reach. For urgent messages, allow one business day for the information to travel through each level.

Required collection of information- When communication is initiated the initiator must set a time frame by level (for areas with multiple levels) of expected turnaround time.

RECEIVING COMMUNICATIONS

No matter what your level is in the hierarchy, you will receive communication from above and you need to be ready to be in receipt of a boomerang. When receiving new information, you first need to understand the message. Question the message and ask, Who, What, Why, When, Where and How does this message apply to you? Your team? The staff you supervise? Do you agree or disagree with the information given? Don’t move forward with a response until you fully understand the message first. Ask questions on the front end, so you can comfortably communicate the message to others in your team and answer their questions.
Stressing the need to ask questions at every level is also important. Some team members might view asking questions as being insubordinate or they might feel apprehensive about speaking up if they don’t understand something. None of this helps us communicate better. It is each individual’s responsibility to actively participate in receiving information at every level and, respectfully, questioning information as well.

“Buy-in” is hard to achieve with every message and for Boomerang Communication it’s no different. There are information releases that are not received well by some people, whether they are staff, faculty or students. Not all information is happy, exciting, or meant to be groundbreaking. Hearing that parking rates are going to increase isn’t fantastic news, but it is information you need to know about if you park at UCLA. The expectation is that people receive and understand the basic organizational information. Boomerang will help in delivering accurate information as it creates a predictable framework for managing incoming and outgoing communications.

**COMMUNICATE THE MESSAGE**

For every level of the Boomerang’s path, there will be the need to communicate the information back out to the levels you manage. It is vital that you’ve followed through on receiving the information as mentioned above. Doing so will result is a more proactive manager or supervisor who is empowered to relay new and powerful information to his/her staff. If you received the information successfully from the start of the process, you should be prepared to relay that same message and its meaning back out again. You must stay engaged to help the Boomerang Communication stay its course.

Energy level is also important. No one listens to a monotone message even if it benefits the employee. As an individual with the responsibility to communicate with other managers or line staff, you must take this role seriously. Your demeanor will set the tone for whatever type of message you relay, and it should always be a positive one even if the content of the message may vary from positive-neutral-negative.

Try to censor censorship when appropriate. One of the downfalls of good communication is when one person in the chain of command makes a decision of what others should or shouldn’t hear. As employees of UCLA, it is our obligation to communicate all of the information given to us meant for mass distribution. Withholding information because you don’t think it’s important, worth someone’s time, or if you think the audience simply
won't care, isn't your call to make. Always remember, it's not your choice to pass or not pass on information when it is intended for the entire UCLA community.

GATHER FEEDBACK

Encourage questions - The likelihood of 100% understanding and equivalent “buy-in” is unlikely. Don’t be surprised when everyone receiving the message nods that they understand and no one asks questions. This is a typical response at multiple levels. It takes an open attitude and earnest prompting to get people to invest in a conversation about the new information. Think back to when you first received the information. How well did you anticipate the questions of your staff? Can you answer all of their questions because you asked all of the same questions? Don’t forget to pay attention to the quieter members of your team. Prompt them politely for questions or at least make sure they comfortably understand the message. Don’t devalue an individual’s questions, as this will discourage them from participating now and in the future.

Take notes - Document the questions that are asked. It’s important to capture both the questions that you can’t answer to get answers from above. It is equally important to document the questions that you could answer to help track what the general concerns are. If 50% of the people are asking the same type of question, that’s information your supervisors may want to know even if you answered the question confidently with correct information. Document general statements regardless of whether they are questions or not. Remember that the purpose of note taking is to communicate both ways with the Boomerang, the direction of the message going out and the direction of the information coming back to the initiator of the communication. This feedback will improve future message content. It can alter the direction of the initiative/project behind the announcement in the first place. Two-way communication, top to bottom and bottom to top, allows for growth and improvement in an environment that is as transparent as possible.

Track Distribution - This step may seem like operational red tape, but it is critical to continuously process improvement in communications. For instance, ask questions such as: Did everyone get the new HR notification? Have we communicated that one of the vendors has changed? When was the last time you thought to yourself, I wish someone had told me this information? Who covers communications when a supervisor is out on vacation? Who notes when you have five employees out on the day you delivered a major
message that they weren’t included in the delivery? Did an entire branch of your information tree just miss the message? Tracking who got the information allows for better follow up with your own team and allows the management that sent the Boomerang around to track who did and didn’t receive the message. This also allows for follow up and improvements to each level’s communication procedures.

TO CATCH A BOOMERANG

If you ever see a real boomerang in action, they will have a special curved shape that creates unbalanced aerodynamic forces referred to as “lift.” When one is thrown correctly it will return to the thrower. That’s the key takeaway from the Boomerang Communications Procedure. The hope was to generate some “lift” in communications overall. Once properly trained, any initiator of a communication could properly package information to launch it on its journey up and down the communication hierarchy. In a specific amount of time, the message will return to its initiator. Once the initiator has the Boomerang back in hand, he or she will have achieved the following:

- Total communication coverage - A percentage based on number of total employees expected to be communicated with vs. actual number
- Breakdowns - Where in the communication chain can you spot the needs for improvement?
- Questions unanswered - What were the questions you weren’t prepared to answer after the information was delivered?
- Questions answered - What were the things that people find most interesting in your message? Did you team recognize what was the most important takeaway?
- Reception/Perception - General demeanor of the reception of the message. Was there buy-in?

With these tools and adequate practice over time, you will be able to effectively and accurately communicate different messages across many audiences. Your future successes in effective communication will give you and your team an additional “boost” professionally and personally.
Boomerang: 3 Results Types Diagram

- **Best case scenario when delivering information is that everyone understands it.** When they don't get it, they ask questions until they do. When they don't buy into the information, they speak their concerns so there is a discussion. They take the message and deliver it with the intent of the information Origin.

- **A common issue when information is passed down a level to the next Point of Contact (PoC), is a lack of understanding.** Neglecting to ask questions to gain understanding. When they convey the information it is inaccurate and misleading. Which can continue to get worse at each PoC. This can lead to miscommunication.

- **A common issue when the information is poorly received by a PoC.** This PoC doesn’t address concerns with the information Origin, or the PoC above them. Instead they taint the information with emotional responses and misunderstanding. Their demeanor about the information can change the receptivity of their audience.