



Postmortem with Purpose

A Change Model Approach
to Project Management

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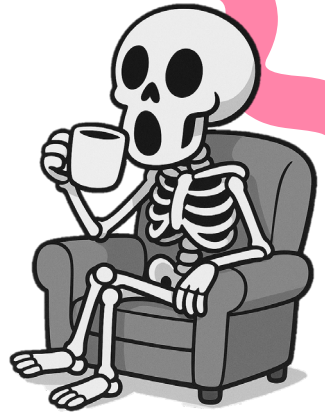
04 Reflection & Revival

Meet Skelly!

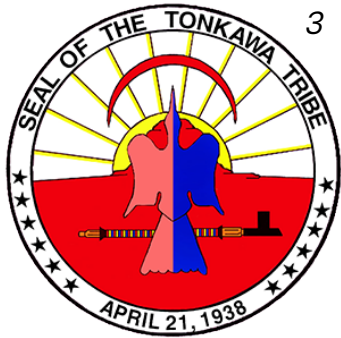


01

Context & Background



This Land We're On...



...was indigenously inhabited by the Tonkawa, Jumano, and Lipan Apache peoples, commonly referred to as *Coahuiltecan*¹. We honor their care for this land on which we gather.



Content Context

Frivolity is the goal.
Belittlement is not.

Let's hold space for real loss.



This Session Is For Everyone

Need an accommodation to engage with this session? Just ask! Your needs matter.

Don't Take Your Secrets to the Grave

Do you like change? Why or why not?

Have you (or has your executive) experienced pushback in a recent project or initiative?



What Do I Get Out of This?

1. Apply the **Satir Change Model** to analyze stakeholder responses during campus-level projects and identify points of resistance or adaptation.
2. Conduct a **project “postmortem”** to evaluate what worked well, what could be improved, and lessons learned for future initiatives.
3. Develop **actionable strategies** to navigate change, build buy-in, and foster collaboration across teams.

The Day My Sanity Died

- Volunteer* (Vol) Core = redesigned general education curriculum
- Vice Provost for Academic Affairs supports Vol Core, so I support Vol Core
- Students can petition for retroactive Vol Core designation to be applied

**At UTK, we are the Volunteers. Go Vols!*

The Day My Sanity Died

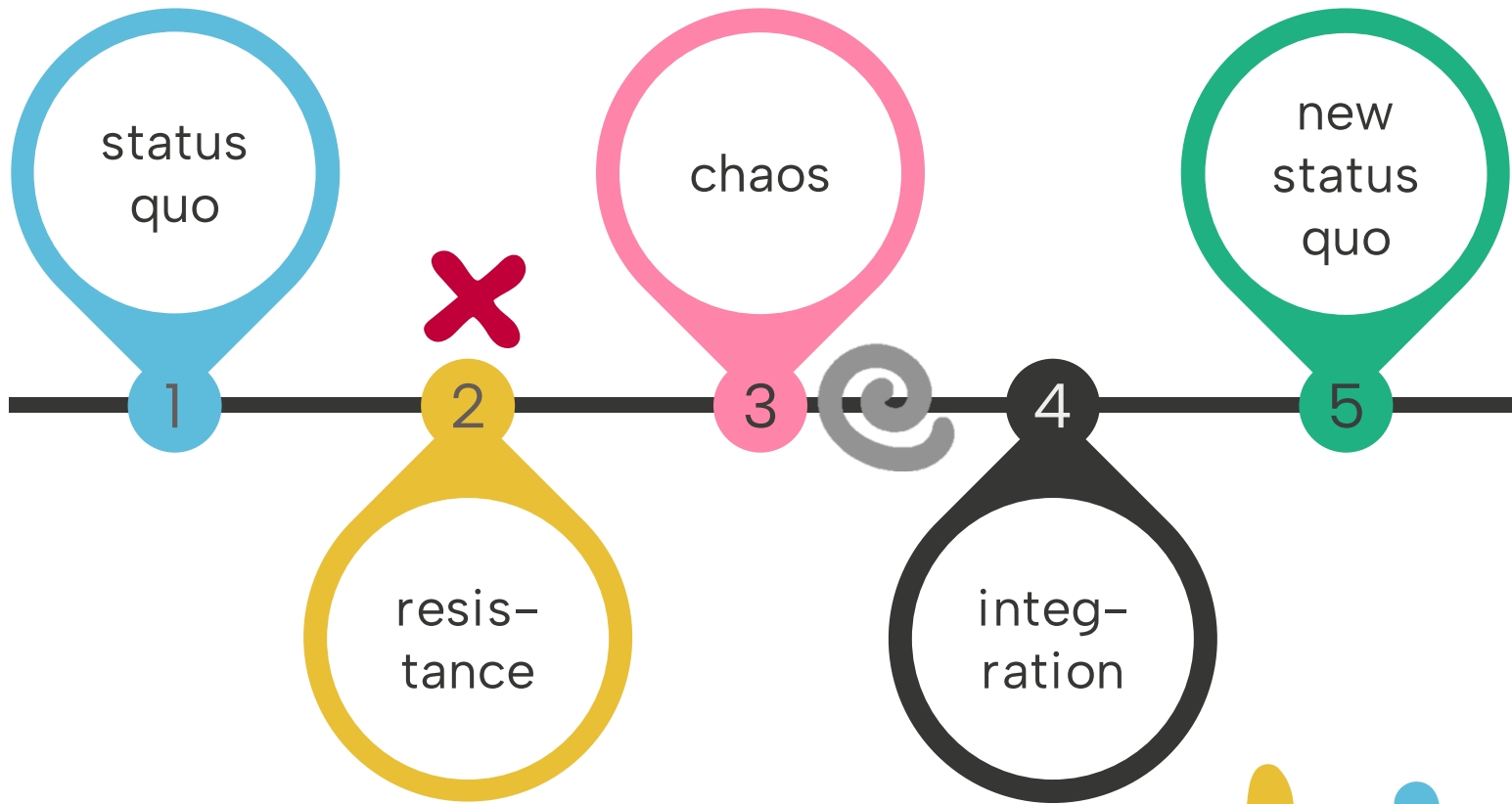
- Petitioning happened manually, clunkily, via emailed PDFs
- I said yes to the ~~dress~~ stress in May 2025
- The project is complete, but the postmortem is not

02

The Satir Change Model

By Virginia Satir
(1916-1988)







Dead Giveaways

Status Quo: "I hate this, but don't rock the boat."

Resistance: "I know I asked for this, but I'm concerned."

Chaos: "This is awful, it made things worse!"


Integration: "Wait... I'm getting the hang of this."

New Status Quo: "This is how we do this now!"



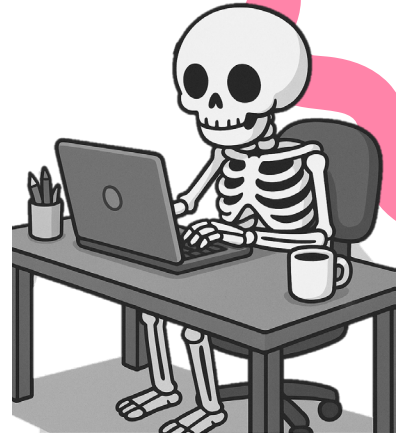


How This Model Slays

- Focus is on human reaction
 - Flexible and adaptable to *all* change
 - Recognizes collaboration as critical
 - Acknowledges resistance as normal
- 

03

The Petition Postmortem



In Memory Of...

Map the project's progress and team responses using the Satir stages.

- What worked during the project?
- Where was resistance or pushback?
- How was chaos managed (or not)?
- What strategies supported integration?



Stake (in the Heart) Holders

- Project team: participate in petition review/processing workflow
- Vol Core Committee: reviews petitions
- Academic Advisors: submit petitions
- Students: want to maximize credits

Office of the Provost | Project Charter

Project Information

Name:	Vol Core Petition Form
Manager:	Madison Merrifield, Senior Academic Programs Specialist
Sponsors:	Beth Foster, Vice Provost for Academic Affairs Alison Connor, Associate Registrar
Start Date:	May 19, 2025
Completion:	July 3, 2025 (<i>anticipated form launch</i>)

Project Overview

- Problem:** Currently, the process for reviewing student petitions for Volunteer Core credit to be applied to courses occurs via email and attached files; this format leads to delayed response, lost petitions, confusion in timing, and sometimes even miscommunication about petition outcomes. Because this process includes multiple committees and departments, a more structured approach is needed.
- Primary Benefit:** Improving the Vol Core petition process leads to increased efficiency, expanded stakeholder accountability, and an improved student experience.

Scope:	The UT Knoxville approval process for Volunteer (Vol) Core petitions, from submission to outcome tracking. Not included: changes to existing petitions, other Vol Core processes, or internal processes specific to the Registrar office.
Goal(s):	1) Document the current petitions process, including all possible outcomes and variations; 2) Turn the process into a fully functioning form via Dynamic Forms; and 3) Effectively implement the form by the start of the 2025-2026 academic year.
Metrics:	Reduced workflow delays, improved response time, and Provost approval
Deliverable(s):	1) Workflow Chart of updated petition review/approval process; 2) Completed form; 3) Process management plan, e.g., an automatically updated tracking spreadsheet of submissions; and 4) User Guide for advisors to reference.

Project Needs

Projected Cost Estimate: \$0 outside of normal operating cost

Required Resources: None outside of normal operating resources

Required Stakeholders:

- Curtis Lee-Perez, Software Analyst, Office of Innovative Technology
- Michelle Violanti, Chair, Vol Core Committee
- Traci Harrison, Associate Director, Transfer Center
- Isabelle Langham, Director of Advising & Technology Initiatives, UG Academic Advising
- Form Approvers (*to be determined*)

June


- 6/13 – collaboration with Office of Innovative Technology (OIT) begins
- 6/13 – ongoing feedback from project team applied to content document
- 6/23 – first round of internal testing of form, feedback shared with OIT

July

- 7/1 – meetings with individual project team members; form revision continued
- 7/8 – progress update email to project team with specific feedback requests
- 7/8 – advisors solicited to submit test petitions and provide feedback
- 7/24 – advising leadership group notified of project to update petition process




August

- 8/1 – colleges reach out for form updates
 - 8/4 – progress update email to project team with specific feedback requests
 - 8/7 – campus colleagues added to have admin view of form responses
 - 8/12 – final form testing before launch
- 




August

- 8/19 – form revisions based on testing feedback from project team and advisors
 - 8/25 – train ATI on form administration
 - 8/26 – FORM LAUNCHES!
 - 8/26 – faculty reviewers and Undergrad. Advising Committee notified of change
- 



August

- 8/28 – OIT report of multiple help tickets from advisors about form “not working”
 - 8/29 – form launch confirmation email to project team, including FAQs
 - 8/30 – ATI report of multiple questions from advisors about various form aspects
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September

- 9/1 – form link and additional materials added to “Advisor Toolkit” by ATI
- 9/3 – form presented to associate college deans; expansion requests made
- 9/3 – feedback from project team member that section of content is missing

September

- 9/4 – OIT report of multiple requests from advisors to change input field on form
- 9/6 – requests from project team to implement additional form changes
- 9/8 – decision made to hold off on form changes until end of semester

October

- 10/1 – discovery of broken form link in Advisor Toolkit (fixed on 10/6)
- 10/1 – feedback from OIT of numerous advisor tickets (but not OIT-related)
- Ongoing – anecdotal reports and written emails of negative feedback from all stakeholder groups

November & December

- 11/3 – ATI leads meeting about revising petition; timeline set for December
- 12/5-15 – form temporarily taken offline, revisions implemented by OIT
- 12/16 – live Zoom training for participants

Rest in Peace, Petition Form

Today 11:01 AM

Overheard in my office "this VC form is the best thing that's happened all semester"

Hopefully that encourages you 🤗 our advisors LOVE IT!

Today 12:47 PM

I also just submitted like 10 petitions and it was actually enjoyable. I've never said that before

04

Reflection & Revival






The Postmortem Report


Work in small groups (3-5 people) to **map the project timeline** on the Satir model.

How was this project **successful**?
What could have been **improved**?



Long Live Good Change



1. Expect the chaos, plan for pushback
 2. Consistently communicate the “why”
 3. Take notes, then share notes
 4. Keep your team close
 5. Celebrate and communicate the “wins”
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The background features various colorful abstract shapes and patterns. On the left, there's a black 'X', a yellow L-shape, a green wavy line, a blue spiral, and a pink vertical bar. On the right, there's a green hand-like shape, a pink ring, a black wavy line, a blue horizontal bar, a yellow L-shape, a pink plus sign, and a green dot. The central text is in a clean, sans-serif font.

Eternal Gratitude

If you're *dying* to chat more...

mads@utk.edu | [linkedin.com/in/mermads](https://www.linkedin.com/in/mermads)