Ease In Change

LA CLINICA’S CHANGE MANAGEMENT AND PROJECT PLANNING TOOL
How does change come about?

“I don’t know how it started, either. All I know is that it’s part of our corporate culture.”
So many organizational change projects falter because people pay attention to the changes they are facing instead of the transitions others must make to accommodate them.
The Change Process

Old Status Quo

Foreign Element

Resistance

Chaos

Transforming Idea

Integration

New Status Quo

Time

Performance
Why is it important?
Let me tell you a story...

HOW THE TOOL CAME TO BE
How to use the tool

Use it to think through change. Start at the left and work your way to the right.

Each column lists steps to follow as you work through the change.
EXPLORE

Ask:
- How do you know there is a problem?
- Whose work is impacted?
- What is the opportunity, and how does it connect to our strategic plan?
- Why are we doing this? What problem are we solving? What are we trying to accomplish?

What is the end game?
- Are we ready? Is the timing right for this?
- Have we brainstormed solutions?

Time for a PDSA?

PDSA = Plan, Do, Study, Act
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1a What are we trying to accomplish?
1b How will we know a change is an improvement?
1c What changes can we make that will result for improvement?

PLAN: What steps must be taken to prepare for the first test? What changes may have a positive effect?

2a

Hypothesis: What do we think will happen? Measures: How will we measure our success?

2b 2c

DO: What actually happened? What went as planned? Were there surprises?

3

STUDY: What did we learn from doing this work? Were our predictions accurate? Evaluate our measures to determine success.

4

ACT: Based on what we’ve learned, what steps can we take for the next test? Adjustments?

5

The PDSA template is available on SharePoint via the Councils/Committees page.
ENGAGE

Ask:

- Who is impacted and has the energy to participate in this idea?
- What do others think/feel about this?
- What do opposing viewpoints say?

- Who are the partners and champions for this?
- Is there momentum to move this forward? Is this a priority for my team or for others who would be impacted?
- What level of attention will this require?
Stop for a decision.

Does this idea potentially impact more than one department? If so, start a formal proposal. If not, talk with your leader about moving it without a formal proposal.

**Ask:**
- Why is this happening the way it is?
- What are the financial impacts of a change?

**What are your recommendations for implementing change? How will you measure success?**
- What other considerations exist? Think about risks, safety, data, human resources, public perception, grants/fundraising, and board and federal guidelines here.

Stop here for yes or no decision, either by leader or council/committee.

Does this change require a formal proposal?
The proposal form is available on SharePoint via the Councils/Committees page.
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EXECUTE

- Develop an action plan, clarifying project description, team members, goals, timeslines, boundaries, risks, and resource requirements.
- Communicate to others, sharing the plan and the vision. Update frequently.

- Develop training tools, and train as needed.
- Ensure employees have opportunities to be involved, that problems are addressed, and that successful steps are celebrated.
ENSURE EXCELLENCE

After the plan is in place, evaluate its effectiveness.

- Determine whether measures are being met.
- Hold accountability for performance and compliance.
- Evaluate participants’ experience.

- Determine whether purpose remains clear.
- Provide support and training as needed.
- Improve and adjust as needed.
- Maintain.
Expectations and Next Steps

- Take a look and orient yourself to what stage of change you’re in with any given project.
- Share the tool and the language with others.
- Ask questions when you’re wondering about others.
  - “Are we in Examine right now, or has this decision been made and we’re in the Execute phase?”
  - “How do we know we did an ample job gathering stakeholder involvement in the Engage phase?”
- Pay attention to how much work you’re doing in each stage, where your personal preferences are, and where you take shortcuts. Adjust accordingly.
What questions do you have?

THANK YOU.