

Ease In Change

LA CLINICA'S CHANGE MANAGEMENT AND PROJECT PLANNING TOOL

How does change come about?

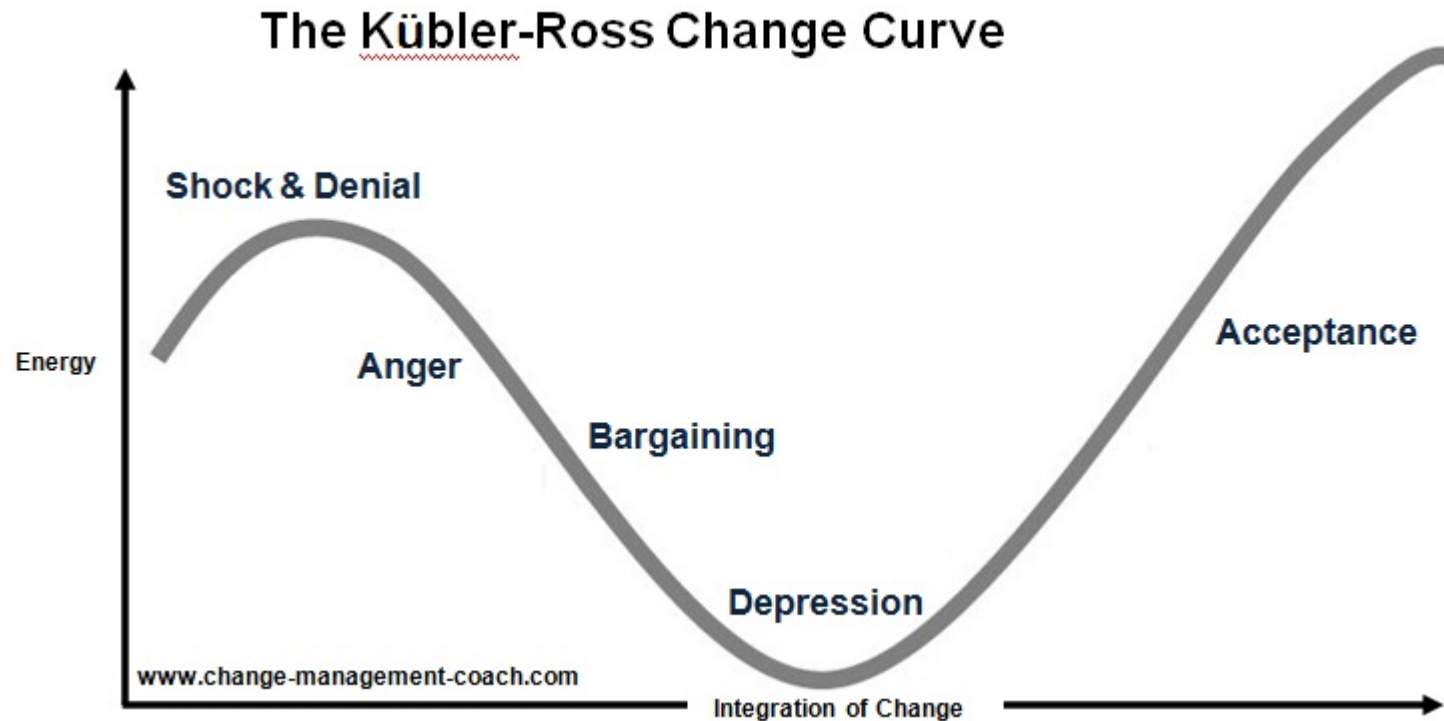




change



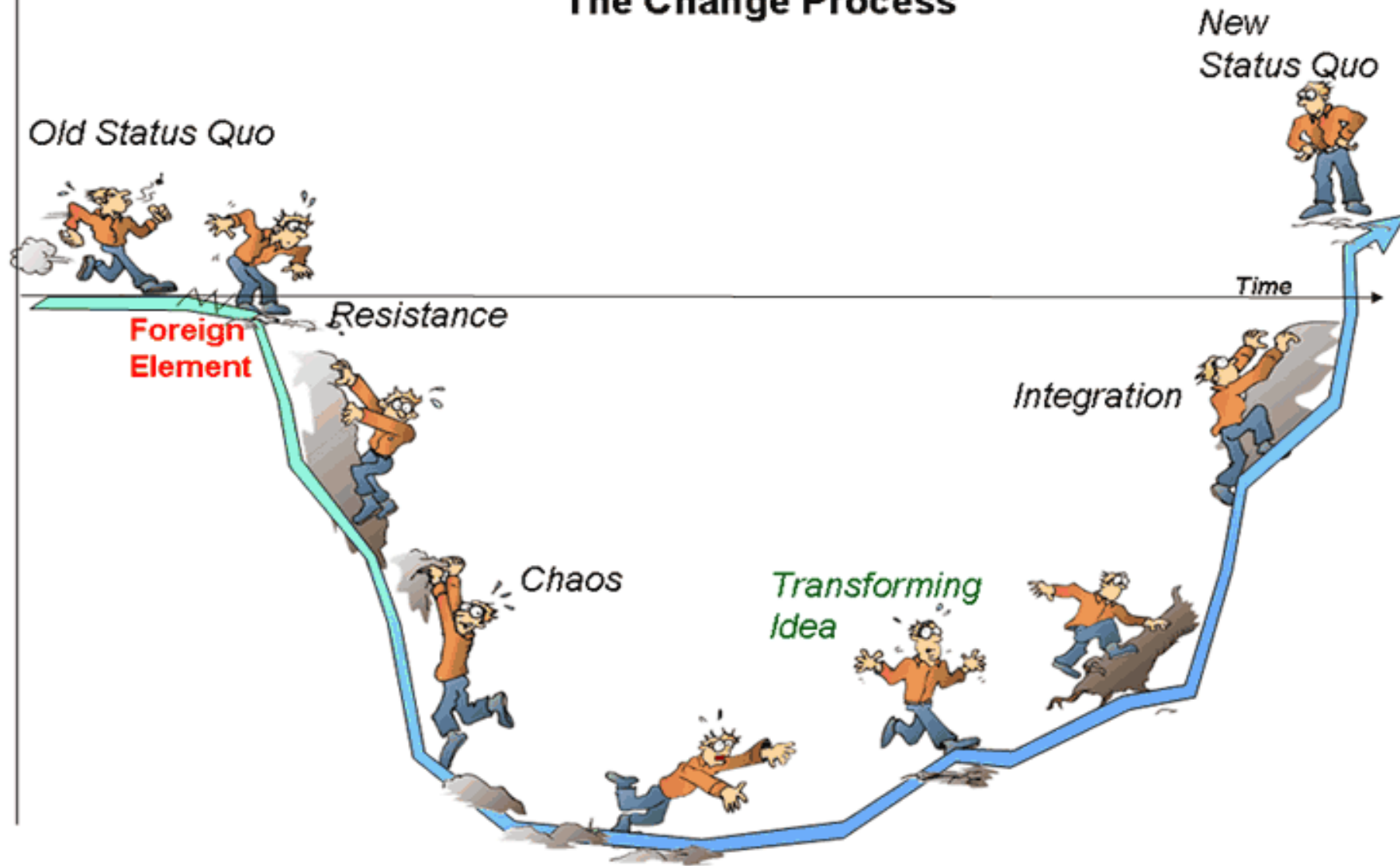
Impact of Change

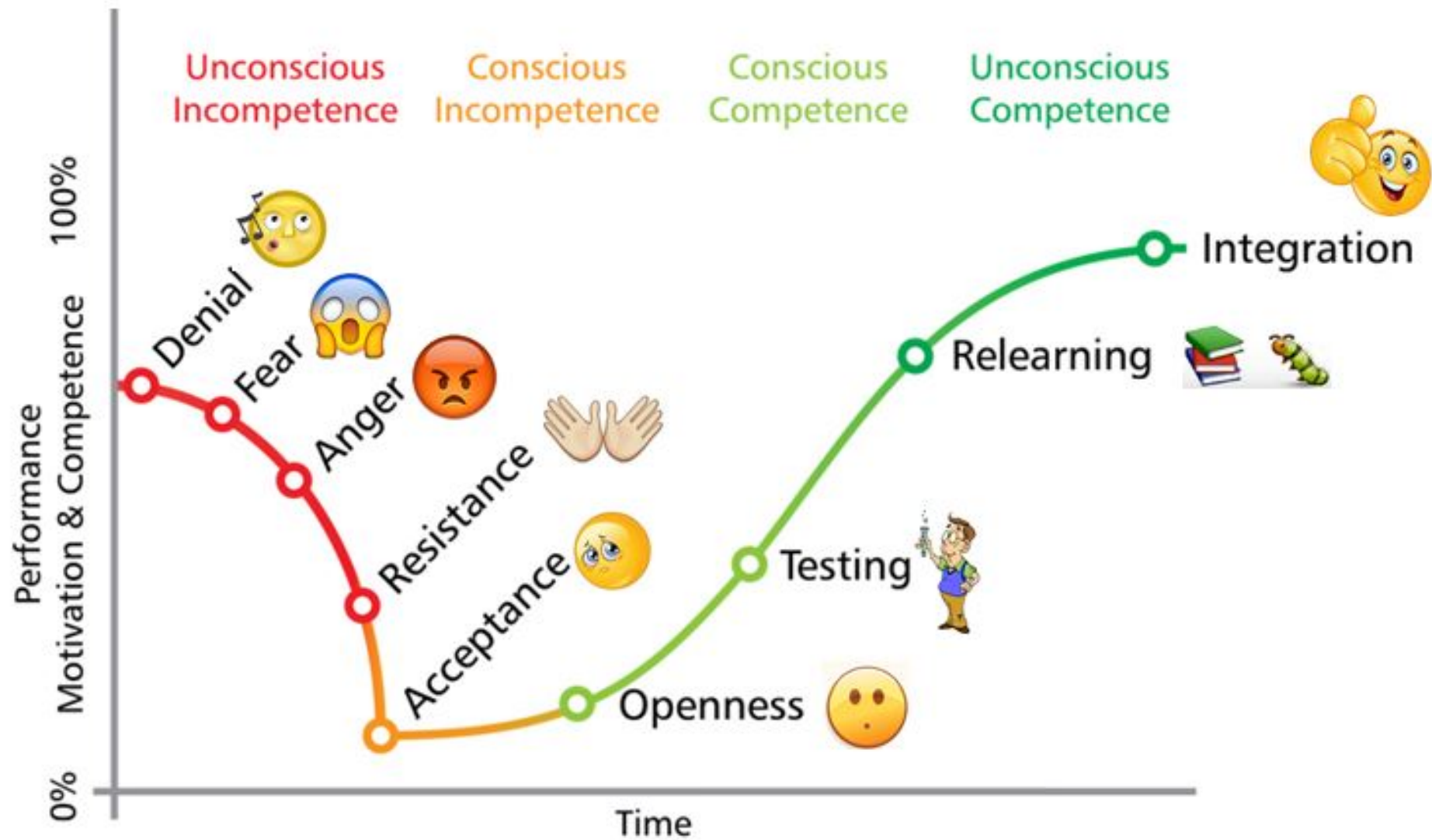


So many organizational change projects falter because people pay attention to the changes they are facing instead of the transitions others must make to accommodate them.

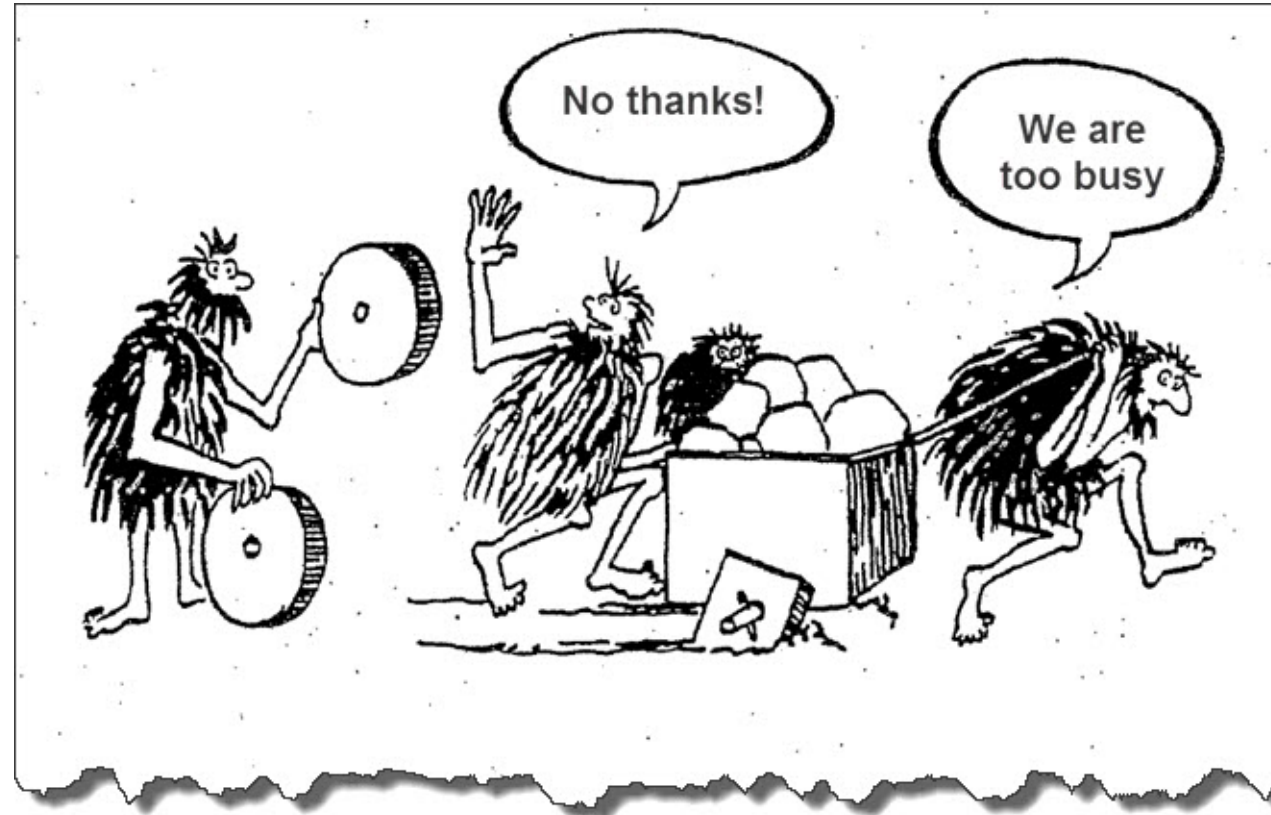
Performance

The Change Process





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

EXPLORE



PDSA: Plan, Do, Study, Act

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?

Title:
Team Members:
Date:
PDSA Cycle #:

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?

2b

Measures: How will we measure our success?

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?

EXAMINE



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?

Stop for a decision.

EXAMINE



The proposal form is available on SharePoint via the Councils/Committees page.

Council Proposal Form

Name of Proposal:

Council receiving proposal:

Linked to strategic goal #: [Click here to enter text.](#)

Date:

Council chairperson:

Submitted by: [Click here to enter text.](#)

☐ **Problem you're trying to solve:** [Click here to enter text.](#)

☐ **Proposed solution—ideal vision. How is this connected to our strategic plan? Describe the solutions you've brainstormed:** [Click here to enter text.](#)

☐ **How will others be positively impacted? Consider patients, staff, and community:** [Click here to enter text.](#)

☐ **Describe the opposing point of view, and the potential negative impact you've considered:** [Click here to enter text.](#)

☐ **Describe how you've involved other stakeholders, especially those who may be impacted by this proposal:** [Click here to enter text.](#)

☒ **STOP:** *If your idea affects just one department, you may not need a formal proposal to move it forward. Consider whether this idea involves significant use of money or time or if it increases someone else's work or is potentially controversial. If so, fill out the remainder of this form and forward it to the appropriate council.*

☐ **Describe your understanding of why this is currently happening the way it is:** [Click here to enter text.](#)

EXAMINE



The proposal form is available on SharePoint via the Councils/Committees page.


Financial impacts of this proposal: (staff time, new costs, lost revenue, etc.)[Click here to enter text.](#)

Recommendations for implementing this proposal: (who, what, where, when, how) + communication:[Click here to enter text.](#)

Additional materials or background the council may need to fully consider this proposal: [Click here to enter text.](#)

Other considerations: (Risks, Safety, Data, Human Resource, Public perception, Grants/Fundraising, Board/Federal Guidelines):[Click here to enter text.](#)

Personal commitment to seeing this proposal all the way through, despite setbacks: (scale of 1-10, 10 being extremely committed) [Click here to enter text.](#)

 **STOP:** *Send your proposal to the appropriate council or committee for discussion and a decision.*

Desired timeline for hearing back on this proposal:
[Click here to enter a date.](#)
(work this out with council and committee chairs)

Desired timeline for implementation (if successful):
[Click here to enter a date.](#)

 To be filled out by chair of council or committee that is the first to hear this proposal:

What is the date of your group's decision?

What steps remain before an action plan can be developed? (Check all that apply.)

- ☐ This proposal goes to another council (specify)_____.
- ☐ This proposal goes to a committee (specify)_____.
- ☐ This proposal goes to the Strategic Integration Committee.
- ☐ This proposal goes to the board of directors.

(If you're unclear, please reference the decision-making guide or seek input from a Committee chair)

EXECUTE



- Develop an action plan, clarifying project description, team members, goals, timelines, 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.

EXPLORE



ENGAGE



EXAMINE



EXECUTE



ENSURE
EXCELLENCE



What questions do you have?

THANK YOU.