Health Leads Change Management Action Plan

Please use this guide to help you develop a strategy for managing change as you establish and improve upon processes to address patients' social needs in the clinical setting. In the blue box, identify the specific changes or improvements to your social needs intervention that you hope to accomplish. Then answer the questions in each category below to design your change management approach to help your organization be successful. Use the example below as a guide.

TIP: share this plan with your staff! Get their feedback to inform your change management plans. Sharing this will also help set expectation and hold both you and the staff involved accountable.

EXAMPLE Change Initiative: making time for nurses to screen for social needs

Communication & Messaging	Sponsorship	Collect Feedback	Respond to Feedback	Training	Share Data	Celebrate Wins
Why is this change needed? Nurses need to have time to screen for social needs so we can consistently identify social need of patients coming to the WIC clinic.	Who is overseeing this change? What is their relationship to the change/the staff? Nurse manager oversees that change. She is the leader these staff report to.	Who will have an opportunity to provide feedback? The nurses will provide feedback on the process	What will be done with the feedback received? Work with staff to test solutions AND communicate back to staff on where that feedback stands.	What trainings or other support will staff need? Staff need at least a half day of training that involves realistic role-play scenarios and a week of close support onsite	What measures will be tracked? -User last login -Number of screens completed by user -number of appointments where screening did not happen	What would an improvement look like? Nurses screen 80% of patients with appointments
How will this message be communicated to staff? To leadership? At project kick-off, at the training and consistently in staff meetings when we share data.	How will they do this? Nurse manager checks in with staff at each weekly meeting. He/She will look at adoption/change data weekly.	How and when will feedback be obtained in a way that is welcomed? 15 min is set aside in each weekly meeting AND feedback box with sticky notes in breakroom	What is the ideal timeline for responding to feedback? Discuss this will staff, maybe agree we will aim for 1 week for easy fixes/changes, and 1 month for large fixes/changes.	How will staff be involved and how will training be tailored to staff needs? One nurse will help design and approve the training plan and advise on topics.	How will data be shared with leadership & staff? Data is posted in the break rooms every week for staff to see and time is set aside to share and discuss the data weekly	How will staff be recognized for their efforts? Staff are recognized by leadership. Staff shares stories with the org. Lunch is provided at monthly meetings when discussing data.

Change Initiative:						
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How will this message be communicated to staff? To leadership?	How will they do this?	How and when will feedback be obtained in a way that is welcomed?	What is the ideal timeline for responding to feedback?	How will staff be involved and how will training be tailored to staff needs?	How will data be shared with leadership & staff?	How will staff be recognized for their efforts?