

Change Management Planning

Section 1: Defining the Change

Project: _____

What is changing?
Description of the change

Why is it changing?
Organizational benefits, individual benefits – WIIFM?

Why are we changing now?
Problem or opportunity

What does success look like?
Measurable outcomes

When should you achieve success?
When benefits will be realized

Your Vision Statement:

Elevator Pitch:

Concise and repeatable, audience-focused message that clearly articulates the problem or opportunity that will be resolved.

Reflections and Next Steps:

Section 2: Risk Assessment

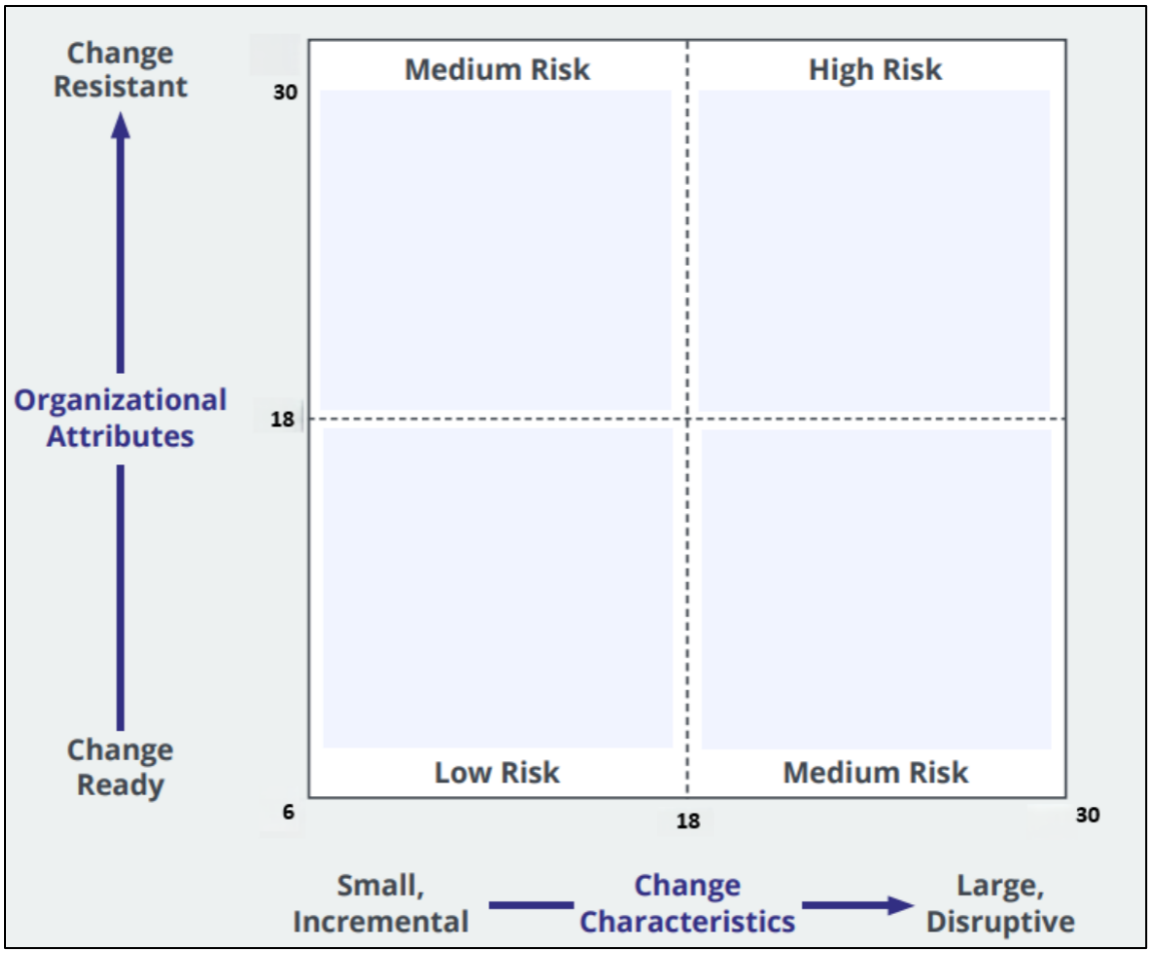
Change Characteristics *(nature and scope of the project)*	**Score**
What is the scope of the change? *1 – team/department / 5 - enterprise*	☐1 ☐2 ☐3 ☐4 ☐5
How many individuals or groups will be impacted by the change? *1 – Less than 10, 5 – Over 1,000*	☐1 ☐2 ☐3 ☐4 ☐5
Impact on compensation or organizational restructuring? *1 – No impact, 5 – Large impact*	☐1 ☐2 ☐3 ☐4 ☐5
How significant or complex is the change? *1 – single aspect/simple, 5 – many aspects/complex*	☐1 ☐2 ☐3 ☐4 ☐5
What is the amount of change overall? *1 – Incremental over time, 5 – Radical, all at once*	☐1 ☐2 ☐3 ☐4 ☐5
What is the timeframe for change? *1 – Sufficient time to prepare, 5 – Insufficient time to prepare*	☐1 ☐2 ☐3 ☐4 ☐5
Organizational Attributes *(readiness of the organization)*	**Score**
How open and responsive is the organizational culture to new ideas and change? *1 – Open and receptive, 5 – Closed and resistant*	☐1 ☐2 ☐3 ☐4 ☐5
What is the overall change saturation in your organization? *1 – Very few changes, 5 – Everything is changing*	☐1 ☐2 ☐3 ☐4 ☐5
What is the availability of resources and funding to support the change? *1 – Adequate resources/funding, 5 – Inadequate resources/funding*	☐1 ☐2 ☐3 ☐4 ☐5
How effective has the management of past changes been? *1 – Well-managed, successful, 5 – Poorly managed, failed changes*	☐1 ☐2 ☐3 ☐4 ☐5
How competent are managers and employees at managing and adapting to change? *1 – Highly effective, 5 – Lack skills and knowledge*	☐1 ☐2 ☐3 ☐4 ☐5
Is there a shared vision and strategic direction for the organization? *1 – Widely shared, 5 – Many directions and shifting priorities*	☐1 ☐2 ☐3 ☐4 ☐5

Risk Assessment Profile

6-14 – Low Risk / 15-23 – Moderate Risk / 24-30 – High Risk

Component	Strength Rating	Key Gaps to Address
Change Characteristics	☐Low ☐ Medium ☐ High	
Organizational Attributes	☐Low ☐ Medium ☐ High	

What is the magnitude of the impact on your district?



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Who is impacted and how?



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Reflections and Next Steps:

Section 3: Sponsoring the Change

A: Active and Visible Participation

Planning Area	Reflection and Action Plan
How will I show up and be visible during the change?	
What events or meetings will I attend or lead to demonstrate commitment?	
How will I model the change personally?	

B: Build a Coalition of Sponsorship

Planning Area	Reflection and Action Plan
Who are the key leaders or influencers I need in my sponsor coalition?	
How often will we meet or check in to align our efforts?	
How will I coach and support others in their sponsorship role?	

C: Communicate Directly with Employees

Planning Area	Reflection and Action Plan
What is *my* personal "why" for this change, and how will I share it?	
What direct communication opportunities will I use (e.g., staff meetings, videos, walkthroughs)?	
How will I create space for two-way communication and respond to feedback?	

Reflections and Next Steps:

Section 4: Leading Your Team Through Change

CLARC Roles of People Management

1 – Not Achieved / 5 – Completely Achieved

Communicator *(clear and consistent communication)*	**Score**
Have I communicated the *why*, *what*, and *how* of this change to my team?	☐1 ☐2 ☐3 ☐4 ☐5
Have I shared how this change connects to our values, mission, or vision?	☐1 ☐2 ☐3 ☐4 ☐5
Am I checking for understanding and answering questions in real time?	☐1 ☐2 ☐3 ☐4 ☐5
Liaison *(actively representing team needs)*	**Score**
Do I have a two-way channel between my team and the change/project team?	☐1 ☐2 ☐3 ☐4 ☐5
Am I accurately relaying feedback from staff in a timely and constructive way?	☐1 ☐2 ☐3 ☐4 ☐5
Do I understand the goals, milestones, and challenges of the change project?	☐1 ☐2 ☐3 ☐4 ☐5
Advocate *(demonstrating commitment to the change)*	**Score**
Have I shared my personal "why" with the team?	☐1 ☐2 ☐3 ☐4 ☐5
Do my actions and decisions show that I believe in the importance of this change?	☐1 ☐2 ☐3 ☐4 ☐5
Am I positively influencing others to engage with the change?	☐1 ☐2 ☐3 ☐4 ☐5

Resistance Manager *(identifying and addressing resistance)*	**Score**
Have I created a safe space where team members can voice concerns?	☐1 ☐2 ☐3 ☐4 ☐5
Am I observing signs of resistance (withdrawal, disengagement, skepticism)?	☐1 ☐2 ☐3 ☐4 ☐5
Have I employed resistance management strategies to help team members move forward?	☐1 ☐2 ☐3 ☐4 ☐5
Coach *(helping my team build skills and confidence)*	**Score**
My efforts to adopt the change have been recognized.	☐1 ☐2 ☐3 ☐4 ☐5
Am I giving timely feedback and celebrating small wins?	☐1 ☐2 ☐3 ☐4 ☐5
Have I asked team members what support they need from me?	☐1 ☐2 ☐3 ☐4 ☐5

Reflections and Next Steps:

Section 5: The Individual Change Journey

ADKAR Model for Individual Change

This assessment tool helps leaders evaluate individual progress through the stages of the ADKAR model. Use the following questions and scoring rubric to assess how well an individual is progressing in each dimension of change.

Response Continuum

1 – Strongly Disagree / 2 – Disagree / 3 – Neutral / 4 – Agree / 5 – Strongly Agree

Awareness	Score
I understand what is changing.	☐1 ☐2 ☐3 ☐4 ☐5
I know why this change is happening now.	☐1 ☐2 ☐3 ☐4 ☐5
I am aware of the risks of not changing.	☐1 ☐2 ☐3 ☐4 ☐5
Desire	**Score**
I support this change.	☐1 ☐2 ☐3 ☐4 ☐5
I see personal or team benefits in adopting the change.	☐1 ☐2 ☐3 ☐4 ☐5
I feel motivated to engage in this change.	☐1 ☐2 ☐3 ☐4 ☐5
Knowledge	**Score**
I understand what I need to do differently because of this change.	☐1 ☐2 ☐3 ☐4 ☐5
I have received training or support to help me adopt the change.	☐1 ☐2 ☐3 ☐4 ☐5
I know where to go to get answers or help related to the change.	☐1 ☐2 ☐3 ☐4 ☐5
Ability	**Score**
I have been able to apply what I've learned about the change.	☐1 ☐2 ☐3 ☐4 ☐5
I have the tools, time, and support to make the change work in my daily role.	☐1 ☐2 ☐3 ☐4 ☐5
I feel confident using new processes or systems introduced by the change.	☐1 ☐2 ☐3 ☐4 ☐5

Reinforcement	Score
My efforts to adopt the change have been recognized.	☐1 ☐2 ☐3 ☐4 ☐5
Leadership continues to reinforce the importance of this change.	☐1 ☐2 ☐3 ☐4 ☐5
I see ongoing commitment to the change from my team and leaders.	☐1 ☐2 ☐3 ☐4 ☐5

Barrier Point

The first element to score a 3 or lower is the individual's Barrier Point

My ADKAR Barrier Point is _____

Reflections and Next Steps:

Use this section to assess individual and collective resistance to the change and identify where additional support or communication may be needed.

Section 6: Project Team Assessment

PCT Quality Assessment for Leaders

1 – High risk/threat | 2 – Alert/possible risk | 3 – Strength to leverage

Leadership/Sponsorship	Score		
Do we have a clearly defined and committed executive sponsor?	☐1	☐ 2	☐3
Is the sponsor **actively and visibly** engaged throughout the project?	☐1	☐ 2	☐3
Is there a sponsor **coalition** that supports and aligns across departments?	☐1	☐ 2	☐3
Does leadership clearly articulate the change vision and expected outcomes?	☐1	☐ 2	☐3
Project Management	**Score**		
Is there a defined project scope, timeline, and resource plan?	☐1	☐ 2	☐3
Are milestones and deliverables tracked and reported regularly?	☐1	☐ 2	☐3
Are risks being identified and mitigated early?	☐1	☐ 2	☐3
Is there clear ownership of technical or operational aspects?	☐1	☐ 2	☐3
Change Management	**Score**		
Have we defined what is changing for individuals (processes, roles, behaviors)?	☐1	☐ 2	☐3
Are we using a structured change management approach (e.g., ADKAR)?	☐1	☐ 2	☐3
Do we have a sponsor plan, communications plan, training plan, and people manager plan?	☐1	☐ 2	☐3
Are we measuring adoption, engagement, and resistance?	☐1	☐ 2	☐3

Overall PCT Health Check

10-12 – Strong / 7-9 – Moderate / 4-6 – Weak

Component	Strength Rating	Key Gaps to Address
Leadership/Sponsorship	☐ High risk, threat ☐ Alert, possible risk ☐ Strength	
Project Management	☐ High risk, threat ☐ Alert, possible risk ☐ Strength	
Change Management	☐ High risk, threat ☐ Alert, possible risk ☐ Strength	

Reflections and Next Steps:

Where do we need to invest more time or resources?

Which element is currently the weakest and could put our success at risk?

What conversations do we need to have to strengthen alignment?

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