Example change management plan for CORD 2015

Needs Assessment (what needs to change & why)	In our traditional "lecture style" conference sessions, learners are not engaged, falling asleep, playing games on their phones, doing email, etc. They say are not paying attention because they can't listen to someone "talk at them" for an hour.	
Main Goal / Objective of the Proposed Change	Design conference sessions primarily based on active learning modalities	
Desired Outcome of the Change	Conference hours where learners are engaged and gaining / applying knowledge in a way that can be easily transferred to the clinical environment.	
Factors / Forces that could effect the desired change (includes barriers)	Environment, Marketplace, & Business Factors:	70% conference attendance required by ACGME, should be sessions learners find useful, many other programs are moving towards active learning.
	Organizational Factors:	Culture of active / interactive learning growing from DIO & EM APD.
	Cultural Factors & Climate:	Culture of collaborative learning and advancement in clinical care is present, but faculty less interested in changing / advancing regarding educational practices. Conference space is antequated and set up with a podium & rows of chairs, not promoting interaction.
	Leader behavior & mindset:	We are passionate about this change & will deliver great sessions ourselves to set an example for others to follow.
	Employee / Learner behavior & mindset: (Your faculty)	They want good "teaching evals" but have a hard time letting go of "covering everything", feeling they "don't have the time to develop something new", and a hesitancy to jump in and really try new methodologies (?fear of change / failure?).
Your personal characteristics that can impact change implementation (list positives & negatives, ie. personality preferences, EQ, leadership / negotiation skills, power, etc)	Strengths: - Am known as the "education person" with an M.Ed, so have some influence - I like to reflect & gather feedback at timely intervals to figure out what is / is not working & modify - Descent EQ with self & social awareness / mgmnt - Ability to identify leadership styles and apply appropriate ones to this charge (coaching, affiliative, visionary)	
	Weaknesses: - Not in a top "leadership" role as APD, haven't been around long enough to be at top of heirarchy - Frustration that medicine is so behind the rest of the educational world & desire for immediate change. Need to be more patient. - Time – not enough time to individually help each person significantly with their conference sessions - Less experience with organizational change skills, building and empowering teams, engaging others.	
Personnel who are	Supporters: DIO, PD, Residents, Younger faculty < 40	

supporters, resisters, and maybes		
	Resisters: Many of the "older" faculty, 55+	
	Maybes: The mid-range faculty ~ 40-55	
Steps of Implementing Change	Establish sense of urgency	We will start "falling behind" other programs who are doing this and we risk losing the "good students"
	Form a powerful coalition	PD, Assoc PD, Assist PD
	Create a vision and strategy	To design premier interactive educational sessions for emergency medicine residents
	Communicate the vision & Inspire a shared vision	Program Leadership (PL) Team (PD, APDs) to communicate & inspire this vision. Will be communicated in faculty and resident meetings. The shared vision will be that we all want to educate our residents as well as we can, and this is a way to do that.
	Model the way	PL team will sign up for conference sessions early in the year to demonstrate.
	Empower action with guidance, training, encouragement	Will create fac dev sessions & send out a list of easy ways to make a session more interactive. Will offer to work with faculty on development of their sessions. Will be present at conference sessions to give encouragement, feedback & assistance.
	Remove obstacles	Help faculty with logistics needed for active learning. (setting up new technology, obtaining props, rearranging conference room to promote interaction, etc). Ascertain what is each person's barrier and work with them to break that down.
	Make it safe to make mistakes & sympathize with negative feelings	Remind people this is a new skill they are learning and they won't be experts at it right away – there will be a learning curve, they will make mistakes and won't be perfect; that is normal. Sympathize that it is hard to feel like a novice again.
	Break down change into small steps	Can have people incorporate 1-2 interactive segments if revamping entire session is too overwhelming. Can let them keep a some powerpoint slides and not outlaw ppt all together.
	Create short term wins / front load rewards	Help a few young faculty develop great sessions, to also be used as examples. Reward people for doing interactive sessions and trying new things (will brainstorm with the chair and PD on how).
	Stay committed to implementing the change & maintain enthusiasm	Don't be discouraged by the "old guy" who still gets up and does his 55 minute "lecture". He will be gone soon enough, or he will start to feel peer-pressured by others.

	Build on the change	Continue investigating advances in educational realm / technology and incorporating / recommending these when useful / appropriate.
List of next (action) steps planned to implement change	1. Discuss results of recent resident survey on conference sessions with faculty (that say the residents are paying attention < 50% of the time, etc)	
	2. Design series of faculty development sessions / materials on how to create active learning environments (some delivered in person in short 5-10 min bursts at faculty meeting, some podcasts, some reference sheets / handouts).	
	3. Teach senior residents how to give interactive educational sessions (since G3s run some sessions)	
	4. Set up assessment system so presenters can get relevant and timely feedback on their newly designed educational sessions	
	5. Meet with Chair of Department and discuss any potential incentives / motivational tactics he's willing to use (ie. extra-clinical teaching award, recognition, $$, other)	

Change Management Plan Template: CORD 2015

Needs Assessment (what needs to change & why)	*What needs to change and why? How have you identified this need? Is it a real need or a perceived need (do you have data / evidence to support this need or is it just your opinion)? If you don't have data / evidence, it is recommended to collect some (even if it is just a survey of whoever the perceived gap / need affects).*	
Main Goal / Objective of the Proposed Change	*Write this G/O as if you were writing it for a curriculum you are developing, using upper levels of bloom's taxonomy (create, develop, evaluate, analyze, apply)*	
Desired Outcome of the Change	*What do you want / expect to happen after your main goal / objective has been met?*	
Factors / Forces that could effect the desired change (includes barriers)	Environment, Marketplace, & Business Factors:	*Environment: political, accreditation, economic. Marketplace: is your program / hospital competitive in the current marketplace? Business: ???*
	Organizational Factors:	*How might the goals of your organization and supervisors influence your success with this project?*
	Cultural Factors & Climate:	*What is the culture / climate in your institution and how could this impact your planning (are they innovative and progressive, are they stuck in their ways, etc)*
	Leader behavior & mindset:	*How can the leader (which is often you) influence the change? How can you behave that would encourage others to do what you are doing or what you want them to do ?*
	Employee / Learner behavior & mindset: (Your faculty)	*What is the mindset of your faculty? What do you think their thoughts will be on your new initiative? How do you think they will act?*
Your personal characteristics that can impact change implementation (list positives & negatives, ie. personality preferences, EQ, leadership / negotiation skills, power, etc)	Strengths: *What are your strengths that can help you push your project along? Do you have high EQ (emotional intelligence – self awareness, self management, social awareness, relationship management), and realize that great leadership works through emotions? What is your personality profile (are you an extrovert and will being conversational, enthusiastic and outwardly supportive help your initiative)? Are you visionary and inspiring? Empathetic? An active listener? How are your conflict management skills (are you by default an avoider, an accomodator, a compromiser, a collaborator, or a confronter, and are you able to switch between styles depending on the circumstance)? How are your negotiation skills (are you good at anticipating your & the other person's viewpoints, wants, and needs ahead of time)? What is your preferred leadership style and how comfortable are you at using various styles (visionary, coaching, democratic, affiliative, authoritative, pacesetting, coercive / commanding) in various situations? What is your power profile?*	

	Weaknesses: *What things here are you not as experienced with or not as good at?*	
Personnel who are supporters, resisters, and maybes	Supporters: *Who do you already know will be supportive of your initiative and be "on your side"?*	
	Resisters: *Who do you already know will be against your initiative and actively trying to make it not happen?*	
	Maybes: *Who do you think won't have a strong opinion one way or the other on your initiative?*	
Steps of Implementing Change	Establish sense of urgency	*Why does this change need to be made now? Why not next year?*
	Form a powerful coalition	*What 2-3 people can you pull together who will be influential in getting others to get on board?*
	Create a vision and strategy	*What is your vision?*
	Communicate the vision & Inspire a shared vision	*Who will communicate this vision, how, in what setting, and how will this be turned into a shared vision?*
	Model the way	*What can you do to be a role model?*
	Empower action with guidance, training, encouragement	*What type of guidance or training is needed? In what ways will you provide encouragement?*
	Remove obstacles	*What obstacles will exist if you get people to buy into your initiative? How can you help break these down?*
	Make it safe to make mistakes & sympathize with negative feelings	*How can you explain / normalize that things won't ever be perfect right away when making a big change?*
	Break down change into small steps	*How can this change be broken down so that it doesn't seem so overwhelming to those you are asking to change?*
	Create short term wins / front load rewards	*What short term wins will you use and celebrate? How will you celebrate these? Will they be celebrated publicly?*
	Stay committed to implementing the change & maintain enthusiasm	*What if your change plan doesn't work right away? How will you keep motivated if it seems you are fighting an uphill battle?*
	Build on the change	*Once this change works, what are some next steps you can take to continue with continual improvement in this realm?*
List of next (action) steps planned to implement change	1. *Write here what steps you will take when you return to your institution to put your change plan in motion…*	
	2.	
	3.	
	4.	

	5.