**CCBHC Stakeholder Change Checklist and Plan Template**

**What Is This?**

The Stakeholder Change Checklist lists many change actions that can be taken to influence stakeholders. It is used to identify the change-specific actions your team will take to facilitate integration. An asterisk (\*) indicates a key action. Prioritize these in your change planning.

The plan template provides one place to capture all actions related to your stakeholders.

**How Do I Use It?**

Review and discuss factors with your triad team members. Once you decide on which actions to take, they can be captured as action items in the provided template, and/or in other planning documents like the charter or communications plan.

**Leadership Practices**

* \*Have sponsors been clearly identified? Have they demonstrated strong commitment? How will you ensure key sponsors are on board?
* \*How will you leverage change leadership styles?
* \*How will leadership use consequence management?
* How will hierarchy or roles play into actions for stakeholders?
* \*Are managers and supervisors equipped to support their team members?
	+ Will managers have to act differently somehow?
	+ Will they have to acquire new skills?
	+ Will managers feel threatened?

Vision

Plan

Change

**Communications**

By what means will you communicate? Options include: staff meetings, at events, at status meetings, in emails, in person, via signage, or other visible signs, symbols, branding etc. Be sure to use the communications plan template to help organize communications.

* \*How will you communicate the need for change?
	+ what’s wrong and why need for change (case for change)
	+ vision of desired state
	+ fit with strategy
	+ how you will move there
	+ timelines and support
	+ what will NOT change
* \*Have you introduced your project and your team?
* \*How will communicate the sponsor’s commitment to change?
* \*How will you create opportunities for involvement? How will you encourage 2-way dialogue?
* How will you leverage influencers?
* \*Have you shared how people will be impacted? Do people fear losing influence, or fear losing their jobs? How will you address this fear?
* Have you explained how people will be kept informed?
* Describe how the organization will be supported, and where to turn for assistance.

**Process**

* \*What are the operational aspects of the change? Are significant changes required in structures or processes? How will you communicate this to stakeholders?

**Environment**

* Will high stress levels interfere with readiness?
* What is the history of changes in that part of the organization?
* What kind of (organizational) cultural issues will be at play?
* \*What other work issues will affect priority (e.g. workload)?

**Rewards**

* \*How can we recognize and reward people?

**People Development**

* Do people require any kind of training?
* \*Do they know what they need to do?
* How will you coach others?

**Stakeholder Change Plan Template**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **#** | **Stakeholder** | **Key Influencers** | **Current Frame of Reference** | **Current Buy-in L/M/H** | **Desired Buy-in L/M/H** | **Key Messages** | **Actions** | **Person Responsible and Date** |
|  | ***SPONSORS*** |
| **1** |  |  |  |  |  |  |  |  |
| **2** |  |  |  |  |  |  |  |  |
| **3** |  |  |  |  |  |  |  |  |
|  | ***CHANGE AGENTS*** |
| **4** |  |  |  |  |  |  |  |  |
| **5** |  |  |  |  |  |  |  |  |
| **6** |  |  |  |  |  |  |  |  |
|  | ***TARGETS*** |
| **7** |  |  |  |  |  |  |  |  |
| **8** |  |  |  |  |  |  |  |  |
| **9** |  |  |  |  |  |  |  |  |
| **10** |  |  |  |  |  |  |  |  |
| **11** |  |  |  |  |  |  |  |  |
| **12** |  |  |  |  |  |  |  |  |
|  | ***OTHERS*** |
| **13** |  |  |  |  |  |  |  |  |
| **14** |  |  |  |  |  |  |  |  |

**Communications Plan Template**

**What Is This?**

The communication plan is one place to plan out change communications. “Vehicles” is the way in which you communicate (or the medium) can include staff meetings, at events, at status meetings, in emails, in person, via signage, etc.

**How Do I Use It?**

There are generally two sources of communications for your change project. First, your project itself may require release of communications (e.g. holding a meeting to share your project with stakeholders, or an email announcing a new policy), second, communications are a key way to influence stakeholders, and so completing your stakeholder analysis should generate lots of opportunities to communicate. For example, you may need to plan a one-on-one meeting with a key sponsor. This plan can also be reviewed and approved by your sponsor, so they know what kind of communication is going to whom. Note that communication plans do not typically include your internal project communications (e.g. your project team meetings, conference calls), but there are no hard and fast rules.

| **Audience (TO)** | **Messenger (FROM)** | **Messages and Key Points** | **Vehicle** | **Approval Date** | **Distribution Dates** | **Status** |
| --- | --- | --- | --- | --- | --- | --- |
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