|  |  |
| --- | --- |
| **Project Title:** | <Your Project’s Name> |
| **Prepared By:** | <Your Name> |  | **Date Prepared:** | <YYYY-MM-DD> |

**Nature of Change:**

|  |
| --- |
| <Describe the nature of the social change brought about by the project, including a brief description of the “before and after” state of things> |

**Stakeholder Change Impact:**

|  |  |  |  |
| --- | --- | --- | --- |
| Stakeholder Group | Change Description | Size of Group | Severity of Change |
| <Front-Line Employees> | <Describe how the change brought about by the project affects this stakeholder group in particular.> | <40-50> | <High> |
| <Middle Managers> |  | <5-10> | <Medium> |
| <Senior Managers> |  | <3-5> | <Low> |
| <Other Stakeholders> |  |  |  |

**Change Impact Measurement:**

|  |  |  |  |
| --- | --- | --- | --- |
| Change Impact Factor | Significance of 1 | Significance of 5 | Score (1-5) |
| 1. Timeframe for change
 | Very short (<month) or very long (> year) | 3 month to 12 month initiative |  |
| 1. Amount of change overall
 | Incremental change | Radical, instant change |  |
| 1. Degree of technology and system change
 | No change | 100% change |  |
| 1. Scope of change
 | Workgroup | Department(s) |  |
| 1. Number of impacted employees
 | Less than 10 | Over 3000 |  |
| 1. Variation in groups that are impacted
 | All groups impacted the same | Groups experiencing the change differently |  |
| 1. Type of change
 | Single aspect,simple change | Many aspects,complex change |  |
| 1. Degree of process change
 | No change | 100% change |  |
| 1. Degree of job role changes
 | No change | 100% change |  |
| 1. Degree of organization restructuring
 | No change | 100% change |  |
| 1. Impact on employee compensation
 | No impact on pay or benefits | Large impact on pay or benefits |  |
| 1. Reduction in total staffing levels

**Help Using This Tool**This tool can be used by a Project Manager to assess the social change impactof a technical project (information system, reorganization, process change, etc…). The tool can be used during the Project Planning phase, once the scope and stakeholders are somewhat clear. The assessment can help you estimate how much resistance to expect and where to expect it from. It can also help you plan accordingly, either by indicating the need for further analysis/planning or for dedicated change management resources.*Delete this box after reading.* | No change expected | Significant change expected |  |
| 1. Perceived need for change among employees and managers
 | Compelling business need for change is visible – employees are dissatisfied with the current state | Employees do not view change as necessary – employees are satisfied with the current state |  |
| 1. Impact of past changes on employees
 | Employees perceive pastchanges as positive | Employees perceive pastchanges as negative |  |
| 1. Shared vision and direction for the organization
 | Widely shared and unified vision | Many different directionsand shifting priorities |  |
| 1. Resources and funding availability
 | Adequate resources and funds are available | Resources and fundsare limited |  |
| 1. Organization’s culture and responsiveness to change
 | Open and receptive to new ideas and change | Closed and resistant to new ideas and change |  |
| 1. Organizational reinforcement
 | Employees are rewarded forrisk taking and embracing change | Employees are rewarded forconsistency and predictability |  |
| 1. Middle Management change competency
 | Managers are highlycompetent at managing change | Managers lack knowledge and skills for managing change |  |
| 1. Employee change competency
 | Employees are highly competent at managing change | Employees lack the knowledge and skills for managing change |  |
| Total |  |  | 0 |

**Change Impact Scoring:**

|  |  |  |
| --- | --- | --- |
| Score Range | Change Impact | Recommended Action |
| 20-40 | Low to medium change impact | Continue with project, paying close attention to changes in scope that may affect change impact as well as observing stakeholder attitudes to change |
| 40-60 | Medium to high change impact | Your project has significant change impact. Managing that change will have a strong effect on project outcomes. It is recommended that change management be assigned to a project team member, such as the Project Manager. It is also recommended that you conduct further change management analysis and create a Change Management Plan, distinct from a Training or Communications Plan. The Change Management resources in the PMO can help you work through further analysis on an as-needed basis. Contact the PMO to arrange a consultation. |
| 60-100 | High change impact | The social change brought about by the project is very high and is likely the most probable cause of project failure. Consider adding a full-time change management resource to the project, either out of the project budget or on assignment from the PMO. Contact the PMO to discuss the availability of change management resources. |