**Instructions for Organizational Change Management Planning Template**

**This document provides guiding principles for using the Organization Change Management (OCM) Plan template for all Category 1, 2 3 projects. It should be used by the change leadership team to effectively communicate the project goals, activities, and progress to target audiences. These principles have 10 planning steps. This is document is a guideline and not all planning steps in this document will apply to all OCM plans.**

**Note: Change Champion and Change Team has been identified. Change team may change as the project progresses. Plan to expand the change team as the project moves toward implementation.**

1. **Introduction: Briefly state the mission of the OCM Plan for communicating the change strategy, include overall goal of the implementation and/or changes to the organizational structure**
   1. Adding new organizational units
      * Staffing
      * Reporting/supervision
   2. Changing roles & responsibilities for organizational units that will continue state
   3. Dissolving organizational units
      * Ceasing action on discontinued roles and responsibilities
      * Reallocating roles and responsibilities to continuing entities (if appropriate)
      * Staffing reductions
      * Realigning organizational structures and reporting relationships
2. **Organizational Change Management – Overview. Briefly describe the current state, future state, potential impacts:**

**a. Describe the Current State**

1. Identify the business processes/operational processes impacted by the project
2. Detail those processes
   * + (Include the processes that are directly impacted (primary processes), as well as those that provide input to the primary processes (supplies processes) or receive input from those primary processes (customer processes))
     + Identify controlling Code of Virginia sections, policies, standards, regulations, procedures
     + Documentation
     + Flow Charts
     + Data Flow Diagrams
     + Code of Virginia sections
     + Policies
     + Standards
     + Regulations
     + Procedures
3. Identify the stakeholders of those processes
   * + Describe the stakeholder’s interests/roles
     + Staffing
     + Identify the knowledge, skills and abilities required to perform the current business processes
4. Documentation
   * 1. Organizational Charters & Mission Statements
     2. Position Descriptions
     3. RACI Diagrams
5. Identify and describe the organizational structures that have been established to perform, manage, and oversee the primary processes
   * Documentation
   * Organizational Charts

**b. Describe the Future State (Vision)**

1. Identify the business processes/operational processes that will be performed using the new system. (To the greatest extent possible, avoid comparisons with the Current State.
2. Detail those processes
   * + Include end-state primary, customer, and supplier processes
     + Documentation
     1. Flow Charts
     2. Data Flow Diagrams
     3. Code of Virginia sections
     4. Policies
     5. Standards
     6. Regulations
     7. Procedures
3. Identify the stakeholders of those end-state processes

* Describe the stakeholder’s interests/roles
* Identify the knowledge, skills and abilities required to perform the current business processes

1. Documentation
   * Position Descriptions
   * RACI Diagrams
2. Identify the organizational structures that will be required to perform, manage, and oversee the end-state processes

**c. Assess the Potential Impacts**

1. Changes to business processes such as process re-engineering
2. Critical milestones that must be me for success
3. Changes to the code of Virginia, polices, standards, regulations
4. Stakeholder interests and changes of stakeholders
5. Staffing – adding permanent staff, contractors, job description changes, organizational assignments, new skill sets
6. Organizational structures, i.e., changes in supervision
7. Estimated costs and funding

**Fill-in the names for Stakeholder Management (Reference Communications Plan)**

* Stakeholder Names (Project Sponsor, business process owner, Agency Head, etc.)
* Awareness (HML) – (Assess how much the stakeholder is aware of the change)
* Level of Support – (Financial, resources, technology)
* Influence (HML) – (Assess the measure of influence on money and/or resources, etc.)
* Contingency Plan (as needed) – What if scenarios…such as required resources are not available

1. **OCM Overview (continued) - Communications:**

The Change Team is responsible for developing the flow of communication. Below are some things to consider when developing your communications strategy:

1. Communication (develop a format that aligns with balance of frequency and method to provide meaningful information). Communicate only when you have something meaningful to communicate.
   1. Simple: Reduce amount of information being distributed so that important messages are read – clear and simple.
      * Why this is important – What’s in it for me? (**WIIFM)**
      * HR impact
      * Training impact
      * Policy and procedure changes – Workflow changes
   2. Consistency: Remain consistent in language style, communication channel and timing. Create a standard template for all messages. (IF exists within Comms Plan consider distribution style)
      * Audience (SOC, IAOC, CIOs, AITRs. Project Executive Sponsors, Project Team, Change Control Board, etc.)
      * Key Message(s)
      * Delivery Method(s)
      * Frequency
      * Sender (Change Team is responsible)
   3. Continuous Improvement: Change Leadership team should evaluate and assess the effectiveness by asking for feedback. Share this feedback with key stakeholders.
2. Stakeholder Analysis:
   1. Maintain positive attitude
   2. Demonstrate commitment to the change
   3. Provide reinforcement required for success of the change
3. Communication Activities
   1. Project Newsletter
   2. Project Website
   3. Change Agent Network
   4. Training Campaign (Pilot training, UAT, Train-the-Trainer)
   5. Knowledge transfer
   6. User Community Groups (End-User and Process Owner groups)
4. **Training Objectives:** Use as necessary. Link to project training plan documentation. Below are suggestions on the required or expected training resulting from the change:
5. Document in easy-to-read method
6. Allow input into method of training (hands-on training, CBT, Train-the-trainer, etc.)
7. Have you solicited end-users to conduct UAT
8. Develop training for new system, new employee, employee sustainment training
9. **Upcoming Changes.** Provide the organization with information necessary to prepare for **upcoming** changes**.** Fill-in the information about the new policy and/or procedures relative to the change.

1. **Develop Training.** Fill-in stakeholder group, necessary training required because of the change and ways to deliver training, such as training classes or CBTs.
2. **Training Documentation Requirements.** Insert all required necessary training documents, who is responsible for the training and who reviewed the training.
3. **Training Facility Requirements and Budget.** As applicable. If formal training is required, please not location, groups to be trained, type of training and the date. Is there a cost for training, normally training is free.
4. **Post Implementation Steps – User Groups.** As applicable. This is to ensure that all individuals were aware of the change. Insert department, support person for that department and timeline for support.
5. **Organizational Change Management Team**. List those individuals assigned to the change management team, along with their role and contact information. These individuals could be assigned at the PM on the project team or a project team lead.
6. **Organizational Change Management Team / Signature.** Insert Project Manager who has the overall responsibility for the project. List the key individuals who will review the OCM plan and agree with the contents and objectives.

Last update: July 6, 2020 Environment Overview Appendix Id: Service Management Manual (VAR)

APPENDIX A: Organizational Change Management Plan Source Files

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| **Source File** | **File Summary** | **Location** |
| Implementation Schedule | **Inputs:**   * + Project tasks/critical milestones   **Outputs:**   * Deliverables & due dates | SharePoint: |
| Training Documents | **Inputs:**   * + Document templates   **Outputs:**   * + Guidelines for proper usage | SharePoint: |
| Policy | **Inputs:**   * + PM Standard   + Code of Virginia   **Outputs:**   * Guidelines for proper usage | SharePoint: |
| Standards | **Inputs:**   * + Policy   + Code of Virginia   **Outputs:**   * Guidelines for proper usage | SharePoint: |
| Guideline | **Inputs:**   * + Policy   + PM Standard   **Outputs:**  Guidelines for proper usage | SharePoint: |