

Step 1. INITIATIVE OPTION

Give it a name: ...
Describe the Initiative parameters:

What	
When	
Where	
How	
Who	
How long / many	
Why	
Budget	

Step 2. REALITY

What is the problem to solve? What is the opportunity to pursue?

Contribution to GOALS

Assign a rate as to how the Initiative contributes to reaching the goals listed on the right.

1 = nice to have
2 = indirect contribution
3 = direct contribution
4 = tremendous contribution
5 = mandatory (Goal unachievable without it)

Step 3. GOALS	1	2	3	4	5
Timeliness					
Trust					
Affordability					
Guide Clients' expectations					
Quality					
Teamwork					
Continuous Professional Dev.					

Overall **alignment** to Goals = median of the above rates =

Step 4. WILL List the initiative's stakeholders, identify the sponsor(s) then capture each one's answer to the questions about the initiative.

Stakeholders	Am I Sponsor ?	Have I got a Compelling Reason to Act?	Have I got the Ability to Act?	Can the initiative win Competition w/ my other Assignments?	Is my Gain worth my Pain?

Step 5.1. Assess Change AWARENESS (SPONSOR communicates to their N-n)

Why are we changing?	
What is the risk not to change?	
How does the change align w/ Goals?	

Step 5.2. Assess Change DESIRE (N+1 communicate with their N)

How does the change impact me / us?	
How does it affect my responsibilities?	
What is in it for me?	
What is in it for us?	

Step 5.3. Improve Change KNOWLEDGE (Ns get training)
Step 5.4. Assess Change ABILITY (Ns practice and use effectively; N+1 support their Ns)
Step 5.5. REINFORCE Change (SPONSOR addresses their N-n)

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