# D – Scope Assessment

Understanding the scope of the change can help the project team, especially the project sponsor, determine appropriate resourcing for the change element of the project and integrate it accordingly into the business case. Change should be a dedicated aspect of the business case and costing for any project of a certain scope. Change cannot be implemented effectively when it is “off the side of someone’s desk”, so conducting this assessment can help to ensure that change is appropriately addressed to promote the success of the project.

This following high-level worksheet might be useful to determine how to complete the Scope Assessment quantitatively.

### Nature and Scope of the Change

Describe the nature and scope of the change:

Click or tap here to enter text.

Which groups (teams, departments, units, etc.) are more severely affected? How and why?

Click or tap here to enter text.

Which groups (teams, departments, units, etc.) are least affected?

Click or tap here to enter text.

### Number of Employees Affected

Front-line unionized employees: Click or tap here to enter text.

Front-line non-unionized employees: Click or tap here to enter text.

Supervisors: Click or tap here to enter text.

Managers: Click or tap here to enter text.

Directors: Click or tap here to enter text.

Faculty leadership (Deans, Associate Deans): Click or tap here to enter text.

Executive-level leadership: Click or tap here to enter text.

Others (list): Click or tap here to enter text.

### Number of External Individuals Affected:

Does this change affect any external individuals or stakeholder groups? List them below:

Click or tap here to enter text.

### Type of Change

What areas of Queen’s will be changing? (Check all that apply.)

[ ] Process

[ ] Technology systems

[ ] Organizational (reporting) structure

[ ] Job descriptions

[ ] Staffing levels

[ ] Merger of two or more teams / units

[ ] Others:

### Degree of Change

Would you say that this change is more:

[ ] Radical, dramatic and disruptive?

[ ] Incremental and progressive?

*Note: if you are not sure, this is a great opportunity to discuss with some of your key stakeholders, especially those in the group(s) that will be most impacted by the change*

### Timeframe for Change

List the dates or times for each milestone:

Project initiation: Click or tap here to enter text.

Design initiation: Click or tap here to enter text.

Design completion: Click or tap here to enter text.

Implementation initiation: Click or tap here to enter text.

Implementation complete: Click or tap here to enter text.

Launch: Click or tap here to enter text.

Full transfer to new ownership: Click or tap here to enter text.

### Additional Implications for the Change

As you are reflecting on the change, write down any additional implications or considerations here:

Click or tap here to enter text.

## Scope of Change Assessment

Scope of change: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1Sub-team | 2Entire team | 3Team(s) / group | 4Groups / Units | 5All of Queen’s |

Number of individuals affected: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1Fewer than 10 | 2 | 3 | 4 | 5500 or more |

Variation among affected groups: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1All groups affected the same | 2 | 3 | 4 | 5All groups affected differently |

Type of Change: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1Single aspect, simple change | 2 | 3 | 4 | 5Many aspects, complex change |

Degree of Process Change: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1No change | 2 | 3 | 4 | 5Complete change |

Degree of Technology / System Change: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1No change | 2 | 3 | 4 | 5Complete change |

Degree of Job Role / Job Description Change: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1No change | 2 | 3 | 4 | 5Complete change |

Amount of change: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1Incremental change | 2 | 3 | 4 | 5Radical change |

Headcount level change: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1No change expected | 2 | 3 | 4 | 5Significant change expected |

Timeframe for Change: Choose an item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1Very long (one year or more) | 2 | 3 | 4 | 5Very short (a month or less) |

**Total out of a possible 50:** Click or tap here to enter text.

A score of 30 or higher represents a large change. This will require more change management resources and activities to properly support the success of this initiative.

## Recommendations

Based on the above, some potential recommendations include (check all that are appropriate and add your own):

### Scope of Change

If you scored a 4 or 5 on Scope of Change, you may wish to consider the following:

[ ] The sponsorship model will need to be complex, with a strong steering committee and sponsors of the initiative across Queen’s.

[ ] The total amount of resources, time and effort for change management (and associated costs) will be greater than average because the likelihood of pockets of influential resistance is high.

[ ] A Change Team is required. Each member of the Change Team should dedicate a minimum of 10% of their time to helping to manage, communicate and implement this change.

[ ] The managers of the Change Team members should revise their team members’ objectives for the duration of the change (which is likely to extend past the launch date by several months) to accommodate their work on the Change Team, and to include Change Team objectives.

[ ] A complex Change Team structure may be required, including extended teams within each affected area of Queen’s.

[ ] Managing resistance will need to be a focus, especially at the management level.

[ ] Change management expertise and guidance should be sought from Organizational Development.

Add your own: Click or tap here to enter text.

### Number of Individuals Affected by the Change

If you scored a 4 or 5 in this dimension, you may wish to consider the following:

[ ] Due to the large number of affected employees, face-to-face interactions will be difficult, but important for effective communications. Therefore, overall resources required for communications will be higher than average. Consider engaging with a communications expert and/or drawing on ideas from Organizational Development.

[ ] Managers should be encouraged to take change training (available through the Learning Catalogue) and take training on Queen’s Change Management Methodology to increase the chances of success for this initiative.

[ ] Employee feedback processes will need to be more structured and easier to deploy to large groups. Consider online surveys and focus groups as means to collect feedback throughout the change. Analysis of the feedback and compliance with, and support for, the change will consume more change time and resources.

Add your own: Click or tap here to enter text.

### Variation Among Affected Groups

If you scored a 4 or 5 in this dimension, you may wish to consider the following:

[ ] Stakeholder assessments may result in multiple profiles for change readiness, since different groups at Queen’s will have different cultures, attributes and past experiences with change. This will result in a much more complex communications strategy and engagement plan. Consider working closely with a communications expert and/or with Organizational Development.

Add your own: Click or tap here to enter text.

### Type of Change

If you scored a 4 or 5 in this dimension, you may wish to consider the following:

[ ] Due to the number of organizational components affected by this change, such as processes, systems, tools, organizational design, staffing levels and job descriptions, change management activity is required on a much larger scale. This will require corresponding resources such as time, people and budget.

Add your own: Click or tap here to enter text.

### Amount of Change

If you scored a 4 or 5 in this dimension, you may wish to consider the following:

[ ] This is a large change for Queen’s. Large changes require a high degree of change management and a great deal of preliminary work to prepare people for the change. Be sure to adjust your timelines and, if you are engaging with change late in the project, you may need to adjust and manage expectations and/or increase change and project resources accordingly.

Add your own: Click or tap here to enter text.

### Timeframe for Change

If you scored a 4 or 5 in this dimension, you may wish to consider the following:

[ ] Changes that take place quickly can be more disruptive than changes that take place over a long period of time and more incrementally. Be sure to intensify your change management attention, notably around stakeholder engagement, to help promote success of this initiative.

Add your own: Click or tap here to enter text.

If you scored a 1 or 2 in this dimension, you may wish to consider the following:

[ ] Changes that take place over a long period of time can be exhausting and disruptive for people. You may need to set and celebrate smaller achievable milestones along the way to keep the momentum going.

[ ] Ensure that you are focusing on on-going project and change communications, so that people do not forget what their role is vis-à-vis the change.

[ ] Your stakeholder engagement strategy will need to be lower-level and more persistent over time.

[ ] Consider engaging with Organizational Development to help create a solid change management plan that takes the low simmering approach into consideration.

[ ] Consider engagement with a communications expert who will help to create a suitable communications strategy for this initiative.

Add your own: Click or tap here to enter text.