



THE UNIVERSITY OF BRITISH COLUMBIA



Central Human Resources

Talent & Organizational Development



Change Overview: Planning and Engagement Tool

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What is Change Management?

At its core, change management is a collaborative, structured, and people-centered process that helps individuals, teams, and organizations navigate transition. It provides the plans, clarity, and tools to prepare, equip, and support people to embrace and sustain new ways of working; enabling them to adapt with confidence and thrive.

Change can feel messy, complex, even scary. But with deliberate planning and intentional effort, change can be implemented more successfully. This is the essence of Change Management.

Purpose

If you're launching a new initiative, introducing a new process, or implementing a significant change that may have people impacts, this Change Overview: Planning and Engagement tool is here to help.

This tool is designed to help bring clarity to what's changing, who's affected, and what risks and impacts may arise. Once you've worked through this tool, it can help you move from reflection to action.

This tool guides users through thoughtful, early-stage reflection on change initiatives designed to support anyone involved in leading or managing change, whether you're new to change leadership or building on past experience.

It offers structured prompts to reflect, plan, and engage others in meaningful conversations about what's changing, why it matters, and how to move forward.



Target audience

- » Project teams to clarify the purpose and scope of a change before diving into execution
- » Change leads or consultants to facilitate conversations with sponsors and contributors
- » Managers or unit leads introducing new processes or systems.
- » Cross-functional groups working collaboratively on transformation efforts

When to use

Use this tool early before you begin making changes, ideally during the early planning stages to spark meaningful conversations and shared understanding.

It is important to:

- » Describe the change clearly
- » Identify potential barriers
- » Plan how to reinforce the new way of working

How does it work?

- » This tool prompts you with key questions that help define and scope your change.
- » Use this tool as a guiding document as you work collaboratively with others involved in the initiative Work. Talk to colleagues about their recent change experiences. Ask thoughtful questions to uncover what worked well and what didn't. These insights are invaluable for shaping your approach.
- » Remember, this tool is a living document; it can evolve over time as your understanding of the change deepens. Come back to the tool throughout the change process to reflect on your progress and original intentions.



Change Overview: Planning and Engagement Tool

Instructions: Using the fillable PDF, try to answer as many questions as you can before progressing onto the next steps of your change process. Consider scheduling a short working session with your team to complete this together. Unanswered items can be revisited as the change work evolves.

Why we care

Understand the reason for the change and why it matters.

- » What challenge or opportunity are we responding to?
- » What are the risks of not making this change?
- » Why is this change needed now?
- » How does this change connect to broader strategic goals or policy directions?

Focus: Establish clarity by linking the change to purpose and priorities.

Who is involved

Identify who is affected, who is leading, and who needs to be included.

- » Who and what will be impacted by this change?
- » Who is sponsoring or leading this change?
- » What concerns or hopes have surfaced during this process?
- » What voices or perspectives are missing from this conversation?

Focus: Build trust by engaging the right people and listening to diverse perspectives.

What is changing

Clarify what's new and what stays the same.

- » What exactly is changing?
- » What lessons from recent changes could strengthen this initiative?

Focus: Reduce confusion by making the change clear and relatable.

How we get there together

Plan the journey and invite collaboration.

- » What is the anticipated timeline, and what challenges might affect it?
- » What are the key milestones, and how will we recognize or celebrate them?
- » What training, learning, or skill development will support this change?

Focus: Encourage shared ownership by outlining the path and supporting participation.

How we learn and improve

- » Define success and ensure the change lasts
- » How will we know this change has been successful?

Focus: Reinforce progress by measuring impact and applying lessons learned.

What's next?

Now that you've completed this tool, use it to guide early-stage change planning, facilitate strategic conversations, and build shared understanding around the initiative.

It will also inform the change management activities you'll need to tackle next — such as stakeholder assessments, charters, communication plans, and training strategies.

For more information

Please visit [UBC Human Resources / Managers and Admins / Team and Professional Development / Organizational Change and Transition](#) for more information about change management and available resources to support your initiatives.

CWL required.