

CHECKLIST FOR EVALUATING ORGANIZATIONAL CHANGE

This checklist is a tool to help you consider all the actions to complete throughout the various stages of your efforts to prevent and assess psychosocial risks (PSR).

EVALUATION DURING THE UNFREEZING STAGE

- Designation of the evaluation subcommittee within the change management committee

- Development of the overall evaluation plan (from start to finish of the change)

- Planning for data collection
 - Selection of data collection tools (e.g., individual interviews, questionnaires, focus groups, organizational data)

 - Development of tools*

 - Identification of the number of respondents targeted by service

 - Timing of data collection**

- Presentation and validation of the evaluation plan to the change management committee

- Communication of the evaluation plan to employees

- Development and distribution of a summary sheet of the evaluation plan for employees

- Regular meetings of the evaluation subcommittee

- Participation of the evaluation subcommittee in change management committee meetings

*Remember to include questions that address both the implementation (e.g., whether responsible individuals were able to carry out their assigned tasks related to PSR prevention) and the achievement of objectives (e.g., the number of employees experiencing an improvement in their workload) of the change.

**Don't forget to schedule short and frequent intervals for data collection.

EVALUATION DURING THE CHANGE STAGE

*Deployment of the evaluation plan**

- Data collection based on the choices made in the previous stage (e.g., individual interviews, questionnaires, focus groups, organizational data)

- Analysis of results by the subcommittee for each evaluation point

- Communication of evaluation results to the change management committee

- Adjustment of the change action plan by the committee based on the analysis of evaluation results, if necessary

- Adjustment of the evaluation plan by the subcommittee, if necessary

- Regular meetings of the evaluation subcommittee

- Participation of the evaluation subcommittee in change management committee meetings

- Meetings with employees to present progress

- Distribution of summary reports of each stage to all employees

* Repeat the deployment process until the objectives are achieved.

EVALUATION DURING THE REFREEZING STAGE

- Continuation and maintenance of the deployment of the evaluation plan
- Adjustment of tools as needed
- Data collection using any new tools
- Ongoing meetings of the change management committee and the evaluation subcommittee

RETROSPECTIVE ANALYSIS

- Development of tools to evaluate successes, lessons learned, challenges, and elements to modify for future changes
- Creation of the overall evaluation plan (from start to finish of the change)
 - Selection of tool types* (e.g., questionnaire, focus group, individual interviews, organizational data)
- Analysis of the collected data
- Presentation of the results of the retrospective analysis to the change management committee
- Distribution of the retrospective report to all employees

* The choice of tools will depend on the type of organization, the time required, the number of employees, and confidentiality concerns.

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