

# LEADING CHANGE TOOLKIT™

TO HELP CHANGE AGENTS AND  
CHANGE TEAMS MAKE LASTING  
IMPROVEMENTS IN HEALTH CARE

## Social Movement Action Framework: Developing a strategic plan for collective action worksheet

### Why develop and use a strategic plan?

- To take a vision or dream of a shared purpose, based on a shared concern or strongly desired change, and transform it into a reality. This is done through mobilized individual and collective action.
- To plan for change, as a core leadership structure (e.g., a change team), using a consensus process.
- To clarify objectives and strategies for the change and what needs to happen to reach them.
- To foster ownership, emerging leaders, momentum and collective identity.
- To establish the foundation of your social movement - what it is and what you want to achieve. The vision and mission statements drive your strategy for mobilized collective action – take time as a change team and engage others to get it right before moving ahead!

### Key components:

In the table below, the key components of a strategic plan – vision, mission, objectives, strategies and actions\* – are described in terms of their purpose with examples provided.

\*[Click here](#) for a separate document with the details of an action plan, including a template to get started mobilizing individual and collective action.

Strategic plan component	Purpose	Examples
Vision (the dream)	<ul style="list-style-type: none"> <li>• To describe the change that the change team ideally wants to achieve.</li> </ul>	<ul style="list-style-type: none"> <li>• Excellence in care</li> <li>• Enhancing health outcomes</li> <li>• Equitable access for all</li> </ul>

	<ul style="list-style-type: none"> <li>• To reflect on what is most valued and meaningful.</li> <li>• To let others know about the vision and inspire them to get involved and take action. This occurs by framing or positioning the vision as broadly and inclusively as possible so that others see themselves and their values and want to be a part of the change.</li> <li>• To start building a collective identity as defined by the vision that reflects the shared purpose and goals.</li> </ul>	<ul style="list-style-type: none"> <li>• Transformative change</li> </ul>
Mission (the what and the why of the vision)	<ul style="list-style-type: none"> <li>• To concisely describe, in one sentence, the vision in concrete and practical terms.</li> <li>• To define the desired outcomes and the rationale.</li> <li>• To reflect the shared concern or strongly desired change and how it will be addressed or resolved.</li> </ul>	<ul style="list-style-type: none"> <li>• To implement best practices in fall prevention to promote optimal quality of life</li> <li>• To use evidence-informed best practices to provide person-centred care</li> <li>• To achieve accreditation through excellence in care standards</li> </ul>
Objectives (the progress and timing of the steps taken to achieve the mission)	<ul style="list-style-type: none"> <li>• To establish objectives and timelines for the achievement of the mission. Strive to create SMART objectives – specific, measurable, achievable, relevant to the mission, and timed objectives.</li> </ul>	<ul style="list-style-type: none"> <li>• By December, we will have 30% of staff trained as champions</li> <li>• By the second quarter, all of the staff will know what ‘best practices’ mean</li> </ul>
Strategies (how the objectives will be met)	<ul style="list-style-type: none"> <li>• To describe how the vision will be achieved.</li> <li>• Are similar to action plans but are stated more broadly.</li> <li>• Can include prevention, early intervention, modifications to address barriers and/or improve access, or advocacy to change the system.</li> <li>• Recognizes available resources and opportunities as well as anticipated barriers or resistance.</li> </ul>	<ul style="list-style-type: none"> <li>• Become a designated Best Practice Spotlight Organization® (BPSO®), as an academic organization</li> <li>• Develop education on person-centred care for staff and residents through an eLearning module</li> <li>• Modify infection prevention strategies to reduce influenza outbreaks</li> </ul>

Action plan (the specifics to achieve the strategy)	<ul style="list-style-type: none"> <li>• Details how the strategies will be actualized or implemented - i.e., what changes will happen and by when.</li> </ul>	<ul style="list-style-type: none"> <li>• Click here for more details and a template of an action plan for mobilized individual and collective action</li> </ul>
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SOURCE: Adapted from Centre for Community Health and Development, University of Kansas (Undated).  
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## A template for developing your strategic plan

### Vision:

Using the space below, answer the following guiding questions as a change team on your vision:

1. What is your vision or dream?
2. What must change or happen to achieve this?

### Mission:

Using the space below, answer the following guiding questions as a change team on your mission:

1. What do you want to achieve?

2. How can this be done? (For example, 'Our mission is to \_\_\_\_\_ through/by \_\_\_\_\_'.')

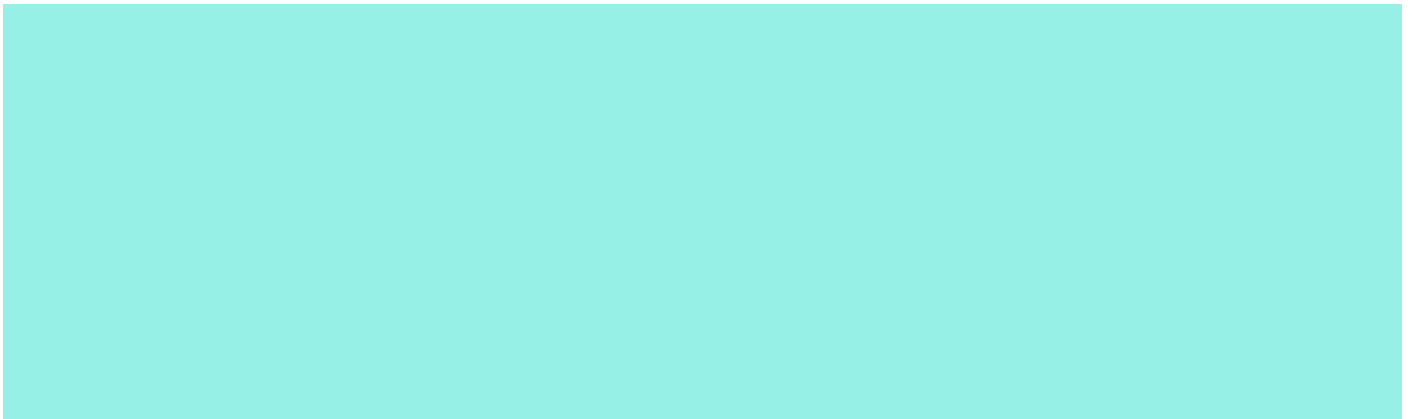


**Objectives:**

Using the space below, answer the following guiding questions as a change team on your objectives:

1. What do you want to achieve? (For example, to increase staff knowledge of best practices in fall prevention or to improve attitudes on implementing evidence-informed care).
2. By when do you want to achieve your objective? If you need to break down your objective into smaller goals, by when would you want to achieve the first one? What would be the next goal and by when would you want to achieve it?

Remember to be SMART and develop objectives that are specific, measurable, achievable, relevant to the mission and timed. (For example, to reduce rates of smoking in young adults by five per cent by offering free virtual smoking cessation groups to young adults between ages 18 - 29 once per week by year-end).



## Strategies

Using the space below, answer the following guiding questions as a change team on your strategies:

1. Taking into account available resources and opportunities, what strategies will you use to achieve your vision and mission? (For example, hold a three-part educational series, conduct an audit, engage a community of practice).
2. What barriers or resistance do you anticipate and how will you mitigate or overcome them?

Remember to review and revise your strategies, as needed, based on the consensus of your change team and the feedback of others.



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