

# LEADING CHANGE TOOLKIT™

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

## What does it take to be an effective change agent using both the Social Movement Action and the Knowledge-to-Action Frameworks? A checklist for change agents and change teams

Knowing what it takes to be an effective change agent using both the Social Movement Action (SMA) and Knowledge-to-Action (KTA) frameworks, as complementary frameworks, can help you and members of your change team develop the know-how to lead change. Use the checklist below to gauge your skill level as a change agent.



### 1. Develop capacity in both frameworks

Change agents should develop the knowledge, skills and confidence in both frameworks. The *Leading Change Toolkit™* is a great starting point with the knowledge, resources, tools and templates needed to build capacity as informal and formal leaders. Watch for the release in 2022 of revised Champions' competencies that will further enrich your work as change agents.



### 2. Determine which components of each framework – all or some – you will be using

Change agents need to determine if they will use both frameworks in their totality, or components of each, for their change initiative. They should recognize that resources, including time and energy for change, are never unlimited and must always be used intentionally. A simple practice change may not require applying both frameworks and all of their components; instead, one framework, or select components of both, may suffice. In contrast, a complex practice change, especially one in which traditional approaches were used and the change has not been achieved and/or sustained, may benefit from applying both frameworks. Taking an SMA grassroots approach combined with the KTA action cycle phases can expand the number of strategies used, (re)engage point-of-care staff and senior leadership teams to effectively mobilize individual and collective action and create powerful change – while also serving to develop local leaders for future changes.

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### 3. Be flexible and able to reconsider strategy, when indicated

As a change initiative evolves, change agents need to assess for signs of progress or determine if the change is stalling or failing. In any of these situations, change agents must be nimble and able to rethink their strategy, including if only one framework is being used, to reconsider using both (or vice versa). This can help scale change that is progressing, recharge one that has stalled, or reimagine a change that has failed to achieve goals.



### 4. Tolerate uncertainty

Change agents must be able to tolerate uncertainty when using novel or alternative strategies such as combining SMA grassroots action with traditional, (often) 'top-down' approaches. Change agents should expect and be prepared to adjust their expectations; for example, timelines may need to be lengthened to accommodate factors such as learning new skills and engaging staff as informal leaders. Despite this, change agents should be reassured that applying combined approaches can also accelerate progress and optimize outcomes, sustainability and leadership growth.



### 5. Commit to champion change as innovators

Change agents using both frameworks value innovation and new implementation strategies that support knowledge mobilization. They recognize the limitations of traditional 'top-down' approaches to reach sustainability and are committed to engaging novel approaches to secure higher effectiveness.



### 6. Value the collaborative energy of informal and formal leaders to accelerate success

For change agents using the two complementary frameworks, they recognize and value the collaborative leadership of both informal and formal leaders needed to achieve change. Change agents value point-of-care's first-hand knowledge and direct experience of practice and the engagement of persons with lived experience, and know that these perspectives must be integrated to inform effective and meaningful practice change. Change agents also acknowledge the role of senior leadership teams and how they as formal leaders, can provide guidance and secure the necessary resources and support to move change forward. Change agents, as either informal and formal leaders, know that to be successful they must own the change together through robust engagement and collaboration throughout the change process.