

## Glossary of Terms

The following terms and descriptions have been assimilated from the efforts of the pan Canadian Change Management Network and are intended to present a foundation of common language and dialogue within the eHealth Change Management community. This listing is expected to be further developed and refined.

Descriptions come from multiple sources as cited.

### Terms and Descriptions

Term	Description
Adopters of Change <sup>1</sup>	Adopters of change are grouped into five categories: Innovators (venturesome); Early adopters (respectable); Early majority (deliberate); Late majority (skeptical); Laggards (traditional).
Advocate <sup>2</sup>	An advocate is a person who helps build a case for change by drawing support from within the industry, by selling the idea of change. Advocates do not need to be people in authority or in the organization. The key attribute of an advocate is having the trust and confidence of potential sponsors and being able to influence the sponsor's decision.
Adoption <sup>3</sup>	The acceptance of technological innovation in everyday practice regardless of the degree of infusion.
Benefits Evaluation	An assessment of the impact, benefit or change resulting from participation in an initiative, program or effort.
Benefits Realization	Benefits realization is the process of achieving objectives, which generally includes three components: (1) Articulation of the benefits; (2) Identification of key assumptions or conditions, and development of action plans to address them; and (3) Measurement against objectives.
Business Process Transformation <sup>4</sup>	Business transformation is the institutional capability of translating the strategic business vision for products, services and processes into a commitment and plan for execution. It entails new ways of working, reconfiguration of people and competence to deliver strategic objectives, new ways of influencing and support business change, and ultimately a way to rethink stakeholders' needs to be responsive.
Change <sup>5</sup>	Change involves a shift in action or thinking. It is about the events or circumstances that impact and affect the organization. These could include a new leader, changes in government policy, technology, stakeholder expectations, etc. Thus, change is typically outcome or results focused, in that organizational change is usually a solution to someone's perception of a problem or opportunity.
Change Agents <sup>6</sup>	Change agents are those who make the difference in implementing change at a local level. This will depend on the nature of the change, but the role often falls to middle managers because they have the influence and authority to make the change happen.
Change Champions <sup>7</sup>	These are the early adopters, colleagues who want the change implementation to succeed, and believe the change will be beneficial to the institution. The change champions will be staff affected by the change. They do not have to have management responsibilities.

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Change Consultant <sup>8</sup>	The role of consultant is very different from a line manager who has authority, responsibility and accountability for specific results and outcomes. A consultant role is not the same as a staff role sanctioned by senior management to use specific expertise to implement a project or initiative. Consultants use their expertise, influence and personal skills to facilitate a client-requested change without formal authority to implement recommended actions.
Change Management <sup>9</sup>	A strategic and systematic approach that supports people and their organizations in the successful transition and adoption of health information systems. The outcomes of these change management activities result in solution adoption by users and the full realization of benefits.
Change Managers <sup>10</sup>	Change managers have the expertise to lead the change and can act as role models. They are given responsibility for the day-to-day change implementation. They design the change process, strategy and approach, and confirm these with the change team. They design the communication strategy and contingency plans for the change. They facilitate key events to build commitment for the change, monitor progress and communicate the change results throughout the organizational structure.
Change Maintenance <sup>11</sup>	Too frequently, organizations discontinue their support of change management on completion of implementation. In fact, effective change management requires ongoing support through the measurement of compliance with the change, as well as support for performance adjustments on an "as needed" basis to facilitate acceptance of the change in the organization.
Change Management Framework <sup>12</sup>	The Change management framework is a model of the fundamental elements needed for inclusion in an integrated change management approach, and is designed to achieve strategic objectives. The framework strives to provide information supporting the complexity of change and includes the core elements of: leadership and governance; stakeholder engagement; communications; workflow integration; training and education; and outcomes measurement.
Change Participants <sup>13</sup>	Change participants are all those affected by the change. They will need to know the reasons behind the change as well as the intended effect on them and their work practices. They are stakeholders, but a change may also have stakeholders who are not directly affected. For instance, the funding bodies or governors may have a stake in seeing a change implemented, but the change may not have any immediate impact on their working practices
Change Sponsor <sup>14</sup>	Someone who has the authority, seniority, power, enthusiasm and time to lead/carry through/oversee changes. The change sponsor may not get involved with the day-to-day management of the change but should support and monitor progress. Usually the change sponsor is a senior member of the management team given responsibility for affecting the change. This person ensures the availability of necessary resources and accepts ultimate responsibility for the successful change implementation. Sponsors approve the change strategy and approach. They are active champions and role models for the new reality and they monitor and communicate change progress to interested parties.

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Change Team <sup>15</sup>	The change team is made of staff members charged with implementing the change. They support the change manager in undertaking his or her role and responsibilities. They must have the confidence of both the management and the staff affected by the change. They should be drawn from all areas affected by the change and it is essential they demonstrate commitment to the change. They will need to be given the time from their regular job functions and recognition to undertake the role of implementing change.
Clinical Transformation <sup>16</sup>	A comprehensive, ongoing approach to care delivery excellence that measurably improves quality, enhances service, and reduces costs through the effective alignment of people, process and technology.
Culture <sup>17</sup>	An organization's culture is the set of values and beliefs that cause people to behave in certain ways. When they behave that way and get the results they expect, it reinforces those values and beliefs. This self-reinforcing cycle creates a culture.
Early Adopters <sup>18</sup>	Those who are opinion leaders in most social systems (respectable).
Early Majority <sup>19</sup>	Those who adopt new ideas just before the average member of a social system (deliberate).
Facilitator <sup>20</sup>	A facilitator eases the way for all stakeholders in the change process, providing the environment where they can be actively engaged and empowered. Ideally, facilitators use participatory methods and have a broad base of knowledge and experience as adult educators and leaders of change.
Force Field Analysis <sup>21</sup>	Force field analysis is a specialized method of weighing pros and cons. It is essentially a technique for looking at all the forces for and against a decision and weighting these factors to determine if a plan is worth implementing. Any status quo is a balance of the current forces acting on the system. Change will only occur if that balance is altered by adding forces, strengthening the forces for change, or reducing forces hindering change. When a decision is made to carry out a plan, force field analysis helps to identify changes that could improve it.
Gap Analysis	Gap analysis evaluates the difference between the organization's current position and its desired future. Gap analysis results in development of specific strategies and allocation of resources to close the gap. ( <i>Sometimes referred to as "Fit" analysis</i> ).
Governance <sup>22 23</sup>	Governance concerns the mechanisms that are used to guide, steer or regulate the course of an organization or system. Within the realm of information and communications technology (ICT), governance refers to the structures and processes needed to ensure organizational ICT strategies and objectives are achieved.

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Information and Communications Technology (ICT) for Health <sup>24 25</sup>	ICTs are defined as technologies that facilitate communication and the processing and transmission of information by electronic means. ICT for health refers to the interaction between patients and health service providers, institution-to-institution transmission of data, or peer-to-peer communication between patients and/or health professionals. Examples include health information networks, electronic health records, telemedicine services, wearable and portable systems that communicate, health portals, and many other technology-based tools assisting disease prevention, diagnosis, treatment, health monitoring and lifestyle management.
Innovators <sup>26</sup>	Those who are very eager to try new ideas (venturesome).
Laggards <sup>27</sup>	The last group to adopt an innovation (traditional).
Late Majority <sup>28</sup>	Those who adapt new ideas just after the average member of a social system (skeptical).
Learning Organization <sup>29</sup>	The learning organization facilitates the learning of all its members and continuously transforms itself. Change Management for planned and unplanned change is easier in such organizations.
Outcomes Measurement <sup>30</sup>	Refers to the extent to which a program achieves its stated objectives. Also referred to as “outcomes evaluation,” it measures outputs and outcomes (including unintended effects) to determine program effectiveness, but may also assess program process to understand how outcomes are produced.
Process Owners <sup>31</sup>	Process owners are involved in identifying the business capabilities that need to be developed. They are often involved with providing information for solutions across business units and from end-to-end, integrating new business processes and selecting enterprise solutions. They define investment strategies and assist with transition plans. Their knowledge is needed to ensure the compliance of all enterprise solutions with the appropriate architecture and registration. They may establish and support a change leader / agent network to drive change management activities. The process owners have direct influence on stakeholders, the ability to monitor performance and determine the impact of the change on stakeholders, and track and report progress in alignment to the business change strategy.
Process Measurement <sup>32 33</sup>	Evaluation that focuses on what occurs in a program as it is delivered and documents the extent to which intervention strategies and activities are executed as planned. Involves monitoring implementation activities and processes. This type of information can be used to adjust activities in real-time throughout a program’s life. In the ICT context, it can refer to the process of delivering the program or technology, including alternative delivery procedures.
Sponsorship Assessment <sup>34</sup>	An analysis of the level of support and the sponsorship competency of all key business leaders involved in the change.

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Stakeholder <sup>35</sup>	An individual or group with an interest in the success of an organization and its products. Thus, stakeholders could consist of the organization's own members, senior authorities either within or outside the organization, suppliers etc. Stakeholders are groups internal and external to the organization that affect the organization's interests.
Stakeholder Engagement <sup>36 37</sup>	The process by which the perceptions, issues and expectations of stakeholders are learned. The overall purpose of stakeholder engagement is to drive strategic direction and operational excellence for organizations, and to contribute to the kind of sustainable development from which organizations, their stakeholders and wider society can benefit.
Stakeholder Impact Map <sup>38</sup>	A tool used to assess a project's impact on various stakeholders. Project phases and activities are assessed against key stakeholders and results of each assessment are compiled to reflect the overall impact. The results yield a chart indicating the overall level of change needed and the aspects of the project most likely to be affected.
Sustainability <sup>39</sup>	Described as "when new ways of working and improved outcomes become the norm." Sustainability is achieved when processes have changed and benefits are realized and have even further evolved over time. Sustainability results when the change becomes an integrated or mainstream way of working rather than something "added on."
Transition <sup>40</sup>	Transition is an internal, psychological re-orientation experienced by people coming to terms with a change. It is a process or inner experience not necessarily focused on outcome or results. It is timed differently from the external changes that caused it.
What's In It For Me (WIFM) <sup>41</sup>	A useful way to consider the different needs and attitudes of those who will be key stakeholders in an improvement initiative is to carry out a "what's in it for me" analysis. WIFM criteria could include: deeply held values and beliefs; working relationships; conditions of work: place, hours etc.; salary; job security; nature of work: tasks, responsibilities etc.; and power: status, position, identity. The more criteria that are negatively affected by the change, the greater the resistance to change. Changes that negatively interfere with a person's power, status, position and identity will evoke the most emotion.

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