

A Discussion Guide: Creating an Effective Change Discussion Guide

May 2019

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Part 1. About Discussion Guides

What is the purpose of this Discussion Guide?

The purpose of A Discussion Guide: Creating an Effective Change Discussion is to guide NC FAST members in developing an effective Change Discussion Guide.

What is a discussion guide?

A discussion guide is a way to address a topic that may affect your reader in a conversational, invitational, and structured way. The careful arrangement of pertinent information helps create transparency, facilitate buy-in, initiate internal strategic planning, and build a trusting relationship with the target audience.

When do I need a discussion guide?

A discussion guide is a flexible, living document which can be used as a research tool and information resource. As a research tool for internal stakeholders, a discussion guide can help guide interviews or group discussions. As an information resource for external stakeholders and county partners, a discussion guide is a helpful reference of frequently asked questions about a topic. A discussion guide may be used for research, but it may also move the audience to action, minimize uncertainty, or become part of a larger Implementation Plan.

What is a Change Discussion Guide?

A Change Discussion Guide (CDG) as utilized by NC FAST aids end users in preparing for the change management process necessary for the effective implementation of new NC FAST projects. The goal of a *Change* Discussion Guide is to address topics or questions which the target audience may have about changes. Significant changes, such as those encountered at the onset of an NC FAST project, lead to anxiety for DSS staff. Therefore, while a CDG may contain informational content about an upcoming change, the most important goal is to minimize change anxiety by clearly offering support, conveying both system information and strategies to prepare for the transition. A CDG has practical and emotional components to its goals, and an organization may achieve both through audience analysis and strategic language use.

What do I need to create a Change Discussion Guide?

Creating a CDG involves addressing the worries or concerns stakeholders and DSS staff will face when make changes to their current mode of operations. To create an effective discussion guide, the author will need the following:

- A specific purpose for creating the CDG.
- A clear and decisive goal that expresses what stakeholders need to change.
- A summary about the change that clearly identifies impacted user groups.
- An understanding of the impact of implementing the NC FAST project.
- An understanding of your stakeholders, how your audience may respond to the change, and the history of the program being addressed.
- Clear procedures for how to implement the change successfully.
- (*Optional.*) Support or testimony advocating for the change.

Defining the purpose and goals is the cornerstone for an effective document and an effective CDG. With goals firmly in mind, research the document's target audience to tailor the guide's content. Adding testimony from others who advocate for the change is optional, but testimony would make the CDG persuasive.

Part 2. Research and Information

When encouraging stakeholders to undergo a specific change, the onus is on the writer to forge trust and build credibility. One way to build this trust is to be well-informed of the obstacles to affected parties when completing the proposed change. Acknowledging the affective, or emotional, disposition surrounding tasks that involve change to surroundings, procedures, or resources may greatly aid in building trust and camaraderie with stakeholders. The risks associated with being ill-informed are high, so investing time to obtain information about how the proposed change will affect your stakeholders is *actually* saving time.

How do I determine the purpose and goals of the Change Discussion Guide? Who are the parties involved?

Do not skip identifying a purpose or goal when developing a Change Discussion Plan. Even if a goal is subject to change after investigation or research analysis, having a working goal will help remain focused throughout the creation of the CDG. Scheduling a face-to-face meeting or teleconference with internal and external stakeholders may be beneficial in fine tuning the document's goals.

Who is responsible for researching and information gathering?

It depends on the agreements and available resources between internal NC FAST stakeholders and external stakeholders in the county. Nurturing a collaborative research initiative is ideal because a tacit goal is to create trust and transparency. Information grants power to make strategic changes. Sharing information and knowledge, allowing the other group or organization to take the lead while offering support and guidance is helpful and empowering to both parties in different ways: the DSS county leaders may receive guided insights about their internal processes, and NC FAST staff gain first hand observation.

How can I obtain information about my audience or stakeholders?

Research your audience. Valuable research methodologies include but are not limited to sending surveys, conducting interviews, doing observations, and holding focus groups. A job task analysis will identify the impact of implementing the NC FAST project.

How do I know what kind of information I need to give to my audience or stakeholders?

During your research process, identify your stakeholder's knowledge gaps by identifying the proposed change and its potential effects. If possible, seek support and resource repositories that target stakeholders can use to adjust to the change. If information is missing that will assist your stakeholder, then include that information in the CDG.

Researching cases of other organizations that have undergone the proposed change may also be beneficial. While every setting and situation is different, identifying successes and challenges other organizations have overcome within the proposed change can offer insight to information current stakeholders may need.

Part 3: Writing the Change Discussion Guide

As mentioned before, the goal of NC FAST CDG includes addressing common concerns about change in a conversational, discursive-like manner, and minimize anxiety and unease associated with the proposed change. However, the writing style may shift depending on the needs of the document's target audience. Give special consideration to the document's organization, language choices, and tone.

As you begin writing your CDG, consider how it may be used by your target audience. Is the Guide likely to be printed and used as a hands-on resource or a document to be reviewed only using a computer? Considerations about how the form of the Guide will affect its function may assist in the type of information to include.

What would be the best way to organize a Change Discussion Guide?

There is no set rule on how to organize a CDG, but there are a few best practices to consider:

- If a CDG is going to be longer than 10 pages, add a Table of Contents to the beginning of a document.
- Include an introduction about the topics the Guide will cover at the beginning of the Guide.
- Summarize information about the change at the beginning of the Guide.
- Identify and categorize the stakeholders to be affected by the change towards the beginning of the Guide.
- Begin with information which your target audience would need to understand first, and then develop the information to fill knowledge gaps.

What would be the best way organize information or data on a page?

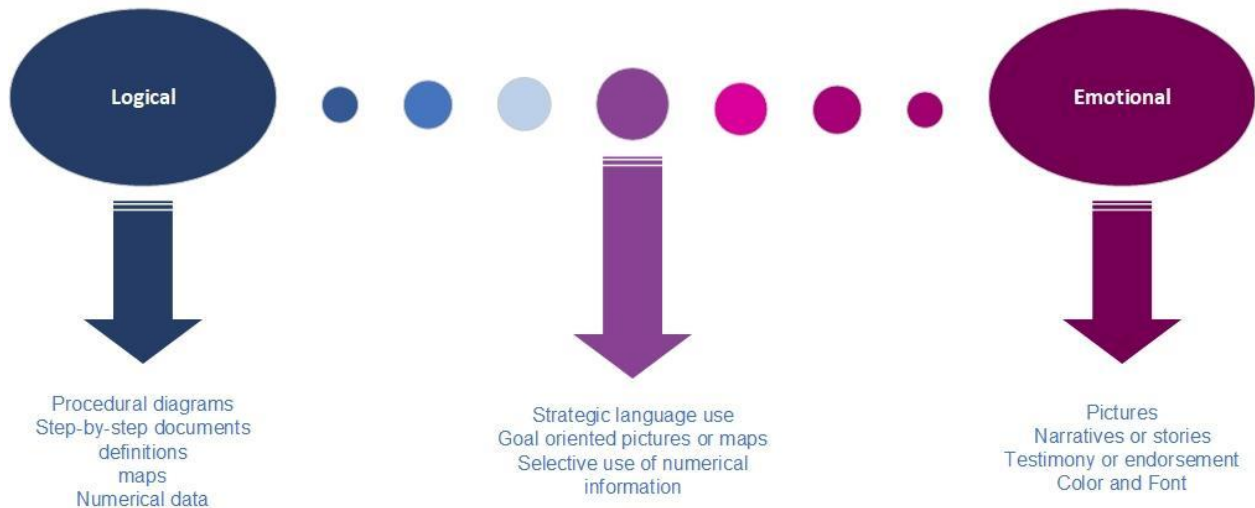
Templates and guides may be available on SharePoint. If not, a few guiding principles will help keep visually coherent:

- Define the margins of the Guide early in the creation process. Standard margins in a Microsoft Word document are 1 in on the left, right, top, and bottom of the page. Information—whether text or image— should never cross the prescribed margins anywhere in the document. If working in PowerPoint without a template, define the margins for the entire presentation.
- If using pictures, imagery and diagrams in a document, make sure the same amount of white space is around each image. Anywhere between 1/8 in and 1/4 in is appropriate amount of text-wrapping space around an image or diagram.
- Tables and diagrams need to include a title. Some may include a short description.
- Consider information hierarchy: the text of important information should come first on a page or have contrast in color or size.
- Similar or related pieces of information should be in proximity.
- Use the NC FAST logo policy as a guide for colors to use. The colors blue and white are easiest for the mind to process.

What kind of information can I present in the Change Discussion Guide?

The kind of information presented will depend on the overall goal of the CDG. When creating a CDG, consider two types of information: logical and emotional.

Logical and Emotional Information Scale



Information in the CDG may primarily appeal to logic, especially when the goal is to inform the reader. Graphs and step-by-step diagrams should be clear, concise, and informative. In contrast, pictures, narratives, or stories have a subjective quality. Information which appeals to the emotions may affect audiences differently. Most of the language or imagery in a document should have a blend of logical and emotional elements in it, especially when the goal is to move the readers to do a certain action. Here are other considerations to maximize information use:

- Large numbers are difficult to comprehend. Using a representational image of data, like an infographic, may increase readability.
- Graphs or data which includes a table of numbers may need to be reorganized to be readable.
- Use color to create contrast and emphasis in maps and tables.
- Some information normally presented in a table may be easier to understand when written, and vice versa.

What should I consider as I adjust the Guide's language and tone?

The language in the CDG should adhere to conventional American English grammar and NC FAST's standards and policies. Peer review with the Team Lead or a Technical Writer may help to achieve appropriate tone and persuasive language goals.

Part 4: Maintaining and Updating a Change Discussion Guide

When should the Change Discussion Guide be reviewed?

The CDG should be reviewed for potential updates after every release until the completion of the project. A master file should transition in its final state as a part of the hand off to Operation and Maintenance (O&M). Changes can include personnel updates, timelines, system functionality, stakeholders, pilot counties, glossaries, and other pertinent information.

Part 5: Discussion Guide Assessment Worksheet

The Discussion Guide Assessment Worksheet is a tool to assist in the Guide's creation and peer review.

Writer: _____

Reviewer: _____

Date of Review: _____

Organization Assessment			
Topic	Yes	No	N/A
Contains a Table of Contents.			
Includes a summary of the upcoming changes.			
Accurately identifies the stakeholders early in the document.			
Clear and coherent answers follow any question presented.			
Questions have a logical progression.			
Related pieces of information are within proximity to each other. Ex: Slides containing related information are within sequence.			
Reviewer's Remarks (Explain any N/A below)			

Stakeholder Assessment			
Topic	Yes	No	N/A
Stakeholders are identified, defined, and classified accurately.			
Offers a situational analysis of stakeholders to identify the purpose of the discussion guide.			
The language used would be understandable to the discussion guide's target audience.			
Contains direct observations about the target audience (first-hand accounts, observations, testimonies).			
The information and step-by-step processes include adaptations or exceptions to address stakeholder and audience needs.			
Reviewer's Remarks (Explain any N/A below)			

Visuals and Formatting Assessment			
Topic	Yes	No	N/A
Global Formatting			
Document margins are consistent throughout the presentation.			
Font is consistent throughout the presentation.			
Colors adhere to the logo standards guide.			
Images, Diagrams, and Text			
Images are sized proportionately.			
Important image details are clearly visible when the guide is printed or as an online pdf.			
Images have an appropriate amount of white space around them.			
Images and text are appropriately aligned.			
Diagram information is clear and legible.			
Tables			
Tables include a title. A description is available if appropriate.			
Table values are labeled logically.			
The table is close to its initial in-text reference.			

Reviewer's Remarks
(Explain any N/A below)