**Case for Change - report template**

*Here is a template based on the Collaborative Problem Solving (CPS) method in order to report to senior management and/or committees and seek approval for agreed actions. It is a structured approach to set out the case for change succinctly and effectively.*

1. **Executive Summary**

Depending on the length of your document, it may be helpful to start your report with a short executive summary to include:

* a summary of the key points
* a list of proposals to the report audience.
1. **Action required**

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| *Set out clearly at the start what you want the audience to do in response to the report. Examples include:** *approve/support proposals – include reference to any resource implications that need approval*
* *consider and comment on specific elements of the proposals*
* *call to action – is there something you need them to do to support implementation.*
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1. **Background**

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| *Context and background:** *why the CPS or improvement project was required – what were the drivers?*
* *what was the approach – a brief outline of the CPS*
* *a summary of who was involved and how - for example, x number of staff from x departments were involved in x problem solving sessions or workshops.*
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1. **The problem**

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| *Include the problem statement that was agreed during the CPS. Some things to consider including alongside the problem statement are:** *summary - a brief summary of how you arrived at the problem statement*
* *impacts – what are the impacts of the problem*
* *data and evidence - avoid a long list of facts and figures and include qualitative evidence, such as things people have said or examples of the problem, to help to bring the problem to life. Use visual representation such as graphs where possible.*
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1. **The Goal**

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| *What is the goal – what are you aiming for? What outcomes are you aspiring to?* |

1. **Causes**

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| *Present the key causes:** *focus on those causes that you identified as being most important*
* *talk about the impact those causes are having on the problem and the extent to which removing them is key to achieving the goal or moving towards the desired Future State.*
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1. **Solutions and recommendations**

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| *Present your solutions and recommendations for improvement:** *say briefly why you have chosen these solutions – how you prioritised, any criteria and weightings used*
* *when will the solutions/improvements be implemented*
* *set out the benefits you expect as a result and how you will measure these. Include any other KPIs and targets and how and when these will be measured.*
* *any resource implications.*
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1. **Next steps**

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| *Include any further work to undertake in this area:** *How you will implement the changes/improvements*
* *Any causes/solutions that you will explore further*
* *When you will report back how the solutions are working and any further action required*
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Author:

Date: