WEBINAR SERIES:
A CLOSER LOOK AT IMPLEMENTING CHANGE

Part I: Readiness
Recording available on UNH Media

Part II: Implementation

Part III: Sustainability
Thursday, March 19th, 12:00 PM
TODAY’S SPEAKERS

Katherine Cox, MSW
Project Director & Practice Facilitator

Hwasun Garin, MEd
Project Director

Dee Watts, LSSBB
Practice Facilitator

DISCLOSURE
The speakers and the planning committee for today’s webinar do not have any relevant financial relationship(s) to disclose.
OBJECTIVES

✓ Describe the importance of utilizing implementation and quality improvement tools and strategies.

✓ Discuss the implementation process.

✓ Understand the key components of project implementation.

✓ Identify useful implementation and quality improvement tools, skills, and concepts.
AGENDA

I. Introduction

II. Understanding the Key Components of Implementation

III. Utilizing Implementation Tools

IV. Q&A
Continuous Improvement Culture

**IDENTIFY**
Opportunities in the process workflow.

**PLAN**
How can the current process be improved?

**EXECUTE**
Implement changes.

**REVIEW**
How changes workings for the team?
Improve & Implementation Synergy

**Improvement science:** systems-level work to improve the quality, safety, and value of health care.

**Implementation science:** work to promote the systematic uptake of evidence-based interventions into practice and policy.
AGENDA

I. Introduction
II. Understanding the Key Components of Implementation
III. Utilizing Implementation Tools
IV. Q&A
Effective Improvement/Implementation

- Systems & Processes
- Gathering Information
- Organizing Information
- Understanding Variation
- Understanding Relationships
- Project Management
Team Charter – When? Why?

**WHEN?**

• In the beginning…!

**WHY?**

• Identifies Risk, Communication, Goals, Stakeholders, Bookends, Resources, In Scope, Not in Scope.

• Focuses your planning and provides categories that you should be using for implementing
  • Roadmap

• When you start to feel lost; project/team contract

• Accountability
Team Charter – Who?

**ACCOUNTABILITY TO WHOM?**

- To Sponsors
- To Stakeholders
- To Team Members
- To the goal itself
  - Migrate your SMART Goals from Readiness Planning...
  - Migrate the goals of the grant; application...
# Team Charter – How?

- Numerous templates available
- Should include:
  - Basic Information about the project
  - Goals
  - Team Members
  - Scope
  - Budget
  - Risks
  - Tasks/Schedule
  - Communication Plan

<table>
<thead>
<tr>
<th>Project Charter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Title</td>
</tr>
<tr>
<td>Practice Name</td>
</tr>
<tr>
<td>Start Date</td>
</tr>
<tr>
<td>Sponsor</td>
</tr>
<tr>
<td>Project Goals</td>
</tr>
<tr>
<td>Project Team</td>
</tr>
<tr>
<td>Team Member</td>
</tr>
</tbody>
</table>

Risk Analysis – Why?

Utilizing risk analysis is where a team can identify potential pit-falls and struggles and can develop a plan to mitigate the findings.

Categories:
- Content
- Resources
- Data
- Training
- Communication
- Conflicting Projects
- Recruitment
- Engagement

Scored on:
- Likelihood that the risk can happen
- Impact it will have
- How difficult it is to detect
## Risk Analysis – How?

<table>
<thead>
<tr>
<th>Risk</th>
<th>Likelihood of occurance 0-10</th>
<th>Impact on project 0-10</th>
<th>Difficulty of detection 0-10</th>
<th>Risk Priority Number 0-30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff turnover</td>
<td>7</td>
<td>5</td>
<td>1</td>
<td>13</td>
</tr>
<tr>
<td>New EHR implementation</td>
<td>10</td>
<td>6</td>
<td>0</td>
<td>16</td>
</tr>
<tr>
<td>Missed charges for new service</td>
<td>7</td>
<td>9</td>
<td>8</td>
<td>24</td>
</tr>
</tbody>
</table>

**Risk Threshold**: 15

RPN > Threshold = Action
GANTT/Scheduling Chart – Why?

VISUALIZE!

• Commitments are in one place
• At-a-glance what is falling behind, what is ahead of schedule, how to reallocate resources to get things back on track, shift focus to areas that need attention
• Key to communication with leadership
• Stakeholders/Sponsors want to know that the project is continuing as planned.

Sets target timeframes/due dates

• Tasks that need to be accomplished to achieve goals
• Knowing your report due dates; milestones to include prep work into the chart

Keeps you on schedule
## GANTT/Scheduling Chart – How?

### Project Schedule & Gantt Chart

<table>
<thead>
<tr>
<th>Task Number</th>
<th>Task Description</th>
<th>Expected Start Date</th>
<th>Task Duration (Days)</th>
<th>Expected Finish Date</th>
<th>Actual Start Date</th>
<th>Actual Finish Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Task: Recruit provider champion</td>
<td>1/15/2020</td>
<td>10</td>
<td>1/25/2020</td>
<td>1/22/2020</td>
<td>2/5/2020</td>
</tr>
<tr>
<td></td>
<td>Owner: Leader</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Task: Recruit team members</td>
<td>1/15/2020</td>
<td>14</td>
<td>1/29/2020</td>
<td>1/20/2020</td>
<td>2/5/2020</td>
</tr>
<tr>
<td></td>
<td>Owner: Leader</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Task: Create and present kick off presentation to department</td>
<td>1/15/2020</td>
<td>30</td>
<td>2/14/2020</td>
<td>1/15/2020</td>
<td>2/14/2020</td>
</tr>
<tr>
<td></td>
<td>Owner: Team</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Task: Collect baseline data</td>
<td>1/30/2020</td>
<td>14</td>
<td>2/13/2020</td>
<td>2/10/2020</td>
<td>2/25/2020</td>
</tr>
<tr>
<td></td>
<td>Owner: IT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Task: Make changes to EHR</td>
<td>2/15/2020</td>
<td>30</td>
<td>3/16/2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Owner: IT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Task: Test changes in EHR</td>
<td>3/16/2020</td>
<td>5</td>
<td>3/21/2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Owner: Team</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Communication Plan – Why?

Shared Resource and Shared Responsibility

• Meetings
• Reports
• Presentations
• Trainings
# Communication Plan – How?

<table>
<thead>
<tr>
<th>Dates</th>
<th>Deliverables</th>
<th>Description</th>
<th>Frequency</th>
<th>Owner</th>
<th>Contact Information</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Meetings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reports</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Presentations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Trainings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
AGENDA

I. Introduction

II. Understanding the Key Components of Implementation

III. Utilizing Implementation Tools

IV. Q&A
<table>
<thead>
<tr>
<th>Improvement Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Data:</td>
<td></td>
</tr>
<tr>
<td>Team Members:</td>
<td></td>
</tr>
<tr>
<td><strong>Aim</strong></td>
<td>Use numerical goals, specific dates, and specific measures. What is the area of focus?</td>
</tr>
<tr>
<td><strong>Measures</strong></td>
<td>How will we know that a change is an improvement? List measures to track for project.</td>
</tr>
<tr>
<td><strong>Plan</strong></td>
<td>How should we PLAN the pilot? Who? Does what? By when?</td>
</tr>
<tr>
<td><strong>Do</strong></td>
<td>How is it going? What are we learning? Any surprises?</td>
</tr>
<tr>
<td><strong>Study</strong></td>
<td>What do the measures show? Has anything changed?</td>
</tr>
<tr>
<td><strong>Act</strong></td>
<td>Based on our results, how will we ACT? 1) Re-test with a modified plan, 2) expand to a wider test group, 3) abandon altogether, 4) adopt the new pilot and monitor?</td>
</tr>
</tbody>
</table>
Process Mapping

- A visual representation
- Industry standardized symbols
- Various Options
Value Stream Mapping

• Next level up from a process map

• Useful in identifying and quantifying wastes
Data Collection

• Identifying Metrics

• Collecting/Tracking Data
  • **Who** will collect the data? Do we have the capability to collect what we need?
  • **What** data, specifically, are we collecting and tracking?
  • **Where** can this data be found?
  • **When** do we need to collect the data? At what intervals over time?
  • **How** do we obtain the data?

Other Considerations: Do we have the right people at the table? How do we share the data?
## Data Visualization

<table>
<thead>
<tr>
<th>Date</th>
<th># Sched</th>
<th># Kept</th>
<th># Kept</th>
<th># Canc</th>
<th># Canc</th>
<th># NS</th>
<th># NS</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>40</td>
<td>27</td>
<td>67.5</td>
<td>5</td>
<td>12.5</td>
<td>8</td>
<td>20</td>
</tr>
<tr>
<td>Aug</td>
<td>66</td>
<td>41</td>
<td>62.12</td>
<td>8</td>
<td>12.12</td>
<td>17</td>
<td>25.76</td>
</tr>
<tr>
<td>Sept</td>
<td>69</td>
<td>50</td>
<td>72.46</td>
<td>9</td>
<td>13.04</td>
<td>10</td>
<td>14.49</td>
</tr>
<tr>
<td>Oct</td>
<td>111</td>
<td>67</td>
<td>60.36</td>
<td>19</td>
<td>17.12</td>
<td>25</td>
<td>22.52</td>
</tr>
<tr>
<td>Nov</td>
<td>87</td>
<td>45</td>
<td>51.72</td>
<td>26</td>
<td>29.89</td>
<td>16</td>
<td>18.39</td>
</tr>
<tr>
<td>Dec</td>
<td>83</td>
<td>48</td>
<td>57.33</td>
<td>17</td>
<td>20.48</td>
<td>18</td>
<td>21.69</td>
</tr>
<tr>
<td>TOTAL</td>
<td>456</td>
<td>278</td>
<td>62</td>
<td>84</td>
<td>17.5</td>
<td>94</td>
<td>20.48</td>
</tr>
</tbody>
</table>

![Graph showing data visualization](Image)
Data Visualization

Face to Face Encounters

Note: Subsequent patient encounters after Initial F2F can be addressed via phone.

Other Considerations:
- Understanding of how/when to use IBH services is emerging across other providers
- # of encounters may be on the rise (re: Dec #s) – more data can confirm for Jan/Feb

Employee Start Date: May 2019

Transition to new building
THANK YOU!

VISIT US
www.citizenshealthinitiative.org

SEND US A NOTE
info@citizenshealthinitiative.org