

IHI Open School Chapter Conference Planning Checklist

This document was created by the joint IHI Open School Chapter at Portland State University and Oregon Health and Science University, and the student and faculty of the West Coast Regional Conference Planning Team. This served as an important resource to the team, as they prepared for their event in April 2015.

A Checklist for Staying Organized

- Strategic Team responsibilities include developing:
 - Team Charters (*see Appendix A on page 7*)
 - Template meeting agenda
 - Master of ceremonies document
 - Conference program, including:
 - Agenda
 - Building resources
 - Breakout session descriptions
 - Bios of keynote speakers

- Advertising tasks include developing:
 - Pre and post media releases
 - Advertising and recruitment timeline
 - Advertisements: Both electronic and paper

- Education/ Content Development Team responsibilities include developing:
 - PowerPoint presentation for both days of the conference
 - Keynote selection process and communications/asks
 - Storyboard criteria, scoring, and selection process (*see Appendix B and Appendix C on pages 8 and 9 respectively*)
 - Call-for-Proposals, scoring, and selection process for Breakout Sessions (*see Appendix D on page 11*)
 - Pre-Conference Workshop Materials

- Funding tasks including developing
 - Funding request packet (*see Appendix F on page 15*)
 - Online giving on conference website

- Welcoming & Hosting Team
 - Orienteering activities
 - Scholarship application

Team Planning Process

1. Strategic Planning Team

Kickoff Meeting: July 2014 (10 months out):

- **Format:**
 - In-person; several hours.
- **Work:**
 - Created working group/teams (using the snowflake model) and formulated ideas about conference content and themes.
 - Theme: Interprofessionalism: Improvement, Safety, System Design, and Leadership.
 - Teams
 - Welcoming & Hosting Team
 - Advertising
 - Fundraising
 - Logistics
 - Education
 - Strategic Team
- **Tools used:**
 - Team Charters.
 - Google Drive for organizing.

Monthly Team Meetings:

- **Format**
 - 90 minute conference calls.
 - Report out meetings for the team leads and strategic team members.
 - August
 - September
 - October
 - November
 - December
 - January
 - February
 - March

- April

- **Tools used:**

- Conference call-line.
- Agenda template.

Working Meeting: April 11, 2015 (1 week out):

- **Format**
 - Working-house party; several hours
- **Work**
 - Created all of the thank you cards and gifts.
 - Put together goody bags.
 - Put together and organized name tags.

2. Fundraising Team

- **Work:**

- Developed a Team Charter and timeline to help organize and strategize the fundraising plan
 - Identify funding streams
 - External
 - Community Partners
 - Affiliated Organizations
 - Individual donors
 - Grants
 - Internal
 - Divisions
 - Schools
 - Individual Contributors
 - Identify forms of solicitation (how are you going to reach out to potential donors?)
 - Funding Packet: Packet of information that has all conference details including a donation page
 - Funding Site: Webpage (Go Fund Me or similar) to support online individual donations
 - Word of mouth campaigns: In order to drum up additional individual donors, we created a word of mouth campaign
 - Pledge 5
 - Grant Applications
 - Donation Documentation
 - Donation Packet

- Sponsorship Packet
- Grant Submissions

3. Education/Content Development Team

Kickoff Meeting: August 2014 (9 months out):

- **Format:**
 - In-person; 90 minutes.
- **Work:**
 - Developed Team Charter and made preliminary plans for Keynote and Breakout Session Speaker selection.
 - Tasks
 - Collect list of potential Keynote Speakers
 - Vote/rank Keynote Speaker options
 - Draft Keynote Speaker ask
 - Send asks to Keynote Speaker potentials
 - Collect list of potential Breakout Session speakers
 - Discuss Storyboard
- **Tools used:**
 - Team Charter
 - Google Drive for organizing documents
 - Google Spreadsheet for listing potential speakers and assigning responsibility for contacting

Semi-regular Team Meetings with regular virtual communication in-between:

- **Format**
 - 60-90 minute in-person or virtual meetings; Regular e-mail communication
 - Discuss process and next steps.
 - August: In-person meeting
 - September: In-person meeting
 - Check-in with processes so far (esp. voting for keynotes)
 - Update on Strategic Planning Committee progress
 - Check-in re: Keynote contacts
 - Break-out Sessions
 - Registration
 - Poster Session Discussion
 - October: No meetings - emails instead
 - November: Call for Proposals out; emails
 - December: In-person meeting; many emails;

- January: In-person meeting to vote on breakout session proposals (2.5 hours); Check-in phone calls with Keynote Speakers; Email communications with breakout session applicants
- February: Virtual meeting regarding storyboard submissions; emails regarding Storyboards and confirm all breakout session applicants connected with.
- March: Emails regarding Storyboard Selections
- April: Communications with breakout session speakers and keynotes via email.
- **Tools used:**
- Google Hangout; Emails; Google Docs

Lessons Learned from Education Team:

- **Team/volunteer engagement**
 - Gauge volunteers' level of interest and time available for commitment
 - Have a larger snowflake -
- **Meetings**
 - In-person meeting 1x every 3 months
 - Virtual meetings 1x every month
- **Keynote Speakers**
 - Have many back-up options
 - It takes a long time to confirm speakers
- **Breakout Session Speakers**
 - Need committed liaisons for speakers instead of just 1 person!
- **Storyboard/Poster Submissions**
 - Have broader requirements
 - More topics/areas
 - Clarify what "storyboard" is versus "poster"
- **Pre-Conference**
 - Find a way to have more students attend!

Appendix A: Team Charter Template

TEAM NAME:

LEAD:

TEAM MEMBERS:

SCOPE:

TASKS:

What needs to be completed in the next 30 days?

<u>What</u>	<u>Who</u>	<u>When</u>

What needs to be completed in the next 60 days?

<u>What</u>	<u>Who</u>	<u>When</u>

What needs to be completed in the next 90 days?

<u>What</u>	<u>Who</u>	<u>When</u>

Appendix B: Storyboard Scoring

Score each storyboard on each factor, using a 1 (low) to 5 (high) scale.

Aim statement	A clearly defined Aim Statement with an expected change in outcome indicator and time to expected change in the outcome indicator.
Project design	An outline of project design/strategy for change that explains how aim will be reached and includes an interprofessional approach.
Changes made	An explanation of the changes made to achieve improvement in the targeted process.
Graphics	Graphical representation of improvement. The use of statistical process control (SPC) tools (especially annotated run charts or Shewhart control charts) is preferred to demonstrate the performance of data over time.
Local adaptation	An indication that changes were tested and/or adapted to the local environment/organization prior to implementation.
Multiple measures	An explanation of how multiple measures were used to understand and show improvement in the target process.
Interprofessionalism	A listing of the interprofessional team that was involved in achieving improvement (elements may include: content experts, patients, leadership, etc.)
Sustainability	A demonstrated sustainability in improvement indicated by the data (if possible).
Summary	A short summary of the lessons learned from the work and/or the message for readers.
Storyboard components	Spelling, grammar, writing quality; storyboard design is clear and visually compelling
Presentation	Student(s) presentation is clear, compelling and interesting. The key points were included and questions were answered confidently and competently.
Total Score	

Appendix C: Judging Overview for Storyboard Competition

1. Education team volunteers judged all submissions using simple 1-5 point scale.
 - a. Two volunteer scorers per submission.
 - b. Scorers should not score their own posters.
 - c. All posters scoring 1 or 2 were rejected and invited to revise and resubmit prior to the final deadline.
 - d. All posters scoring 3-5 were accepted.
 - e. Storyboard team leader notified submitters using a standardized email template within two weeks of the submission (see templates).
2. Identification of finalists
 - a. Only submissions with a student as first author are eligible for the competition.
 - b. Any eligible storyboard that was given at least one score of 5 qualifies as a finalist.
 - c. Storyboard team lead and education team members are eligible to be finalists if they are otherwise eligible.
 - d. Finalists announced to all accepted storyboard authors by team lead by email template approximately two weeks prior to the conference. See email template.
 - e. Team lead to place finalist ribbons on posters as they are posted at the conference.
3. Poster presentation and judging of finalists
 - a. Professional judges.
 - b. Finalists given 5 minutes to orally present, approximately 3 to present and 2 for questions. No other presentation guidelines were provided to presenters.
 - c. Presentations to occur ###/##/####. This requires finalists to arrive early for the conference so posters can be hung on time.
 - d. Judging rubric for finalists is based on guidelines from IHI storyboard handbook (available on www.ihl.org/forum under Call for Proposals); see rubric in Google Drive "WCC storyboard finalists scoring rubric"
 - e. Highest overall score wins.
4. Announcement of winner - Storyboard team lead to make sure facilitator has winner's name, gift. Will call them up to stage, then team lead will hang first-place ribbon on poster before lunch.
5. Prize this year was \$100 gift card to Powell's. Had winning poster had more than one student author, gift cards would have been purchased in smaller amounts to share evenly (e.g., 4 \$25 gift cards). Team lead purchased after conference, gave / mailed to winner(s).

Helpful hints for next time:

- Consider whether they should be “posters” or “storyboards”.
- One submission was "unscientific", and on arrival to the conference explained that “storyboards” meant something specific to them (i.e., telling a story) rather than improvement science-based.

Appendix D: Breakout Session Call for Proposals Template

Subject: IHI Open School West Coast Conference - Call for Proposals - December 22nd Deadline

Dear X,

The West Coast Region and the PSU & OHSU IHI Open School Chapter are conducting a call-for-proposals for the breakout sessions at the first IHI Open School West Coast Conference (WCC) on Saturday, April 18th, 2015, in Portland, Oregon. The conference begins on Friday, April 17th and breakout session speakers are welcome to attend both days.

The theme of the WCC is ***Interprofessionalism: Improvement, Safety, System Design, and Leadership***. Each breakout session will be categorized and focused on one of these topics.

The WCC aims to educate and empower learners to be interprofessional collaborators with each other, their patients, their communities, and their health systems by:

1. Disseminating evidence-based methods of interprofessional (two or more professions collaborating on a project) team-based care that enhance patient safety.
2. Exploring system redesign and opportunities for multiple sectors and professions to interface to design a health services delivery system capable of achieving the Triple Aim.
3. Spreading health systems improvement best-practices from interprofessional and student-led improvement projects.

**Interprofessionalism, for the purposes of our conference, is defined as two or more disciplines collaborating on a larger project.*

Send your session proposals to ____ by **[insert date]**, using the criteria and guidelines below.

PROPOSAL FORMAT

Presenters: Names, titles/degrees, and organizational affiliation.

Proposed Session Topic: Please choose one of the following: Improvement, Safety, System Design, and Leadership.

Proposal Title: You are limited to 100 characters for the title.

Please list 3-5 learning objectives:

Learning objectives should describe the information, skills, behaviors, or perspectives that participants are expected to gain, using measurable action words. For example: Explain, Demonstrate, Analyze,

Formulate, Discuss, Compare, Differentiate, Describe, Name, Assess, Evaluate, Identify, Design, Define, List.

Consider the theme and purpose of this conference. You are limited to 200 characters for each learning objective. Complete the following:

As a result of participating in this session, attendees will be able to:

- Learning Objective 1:
- Learning Objective 2:
- Learning Objective 3:

Describe session content (what you will present and discuss). You are limited to 1,000 characters for your response.

Describe what makes your session interprofessional (content, presenters, etc.). All accepted proposals will address at least two if not more of the health professions (including but not limited to dentistry, health management, law, medicine, nursing, pharmacy, public health, rehabilitation sciences, and social work). You are limited to 500 characters to describe your session.

Describe method(s) used to facilitate interactive discussion. You are limited to 500 characters to describe your methods.

Provide a brief agenda for the session. List the approximate timing and format/topic/purpose for each segment of the one hour session. You are limited to 500 characters to provide your agenda. Do not include more than 10 minutes of consecutive “lecture/theory bursts” at a time. **Total time: 1 hour.**

Thank you,

Appendix E: Breakout-Session Rubric Review

Title:

Primary Contact:

West Coast Faculty? (Y/N)

West Coast Student? (Y/N)

CRITERIA		SCORE
Learning Objectives	<p>10: A minimum of 3 learning objectives stated with clear, descriptive, achievable takeaways that are in alignment with WCC theme.</p> <p>5: 3 learning objectives stated. Less clear.</p> <p>0: Less than 3 learning objectives stated.</p>	
Session Content	<p>10: In strong alignment with WCC theme (interprofessionalism) and session topics.</p> <p>5: Less clear alignment with WCC theme.</p> <p>0: No alignment with WCC theme.</p>	
Interprofessional Collaboration	<p>10: a) A minimum of 2 interprofessional collaborators and/or concepts included in the session. b) Preference for 2 facilitators (of different health professions).</p> <p>5: One health professional presenting but the content appears to be interprofessional in scope.</p> <p>0: Not interprofessional in session content/scope/or facilitation.</p>	
Interactive Style	<p>10: 40 minutes or more is facilitated through active-learning including but not limited to group-based discussion, group/small-team problem solving, and group-presentations.</p> <p>5: 20-39 minutes of the session is facilitated through active-learning including but not limited to group-based discussion, group/small-team problem solving, group-presentations</p> <p>0: less than 20 minutes of the session is facilitated through active learning.</p>	
Agenda	<p>10: A clear agenda that is tied to learning objectives and is achievable in 1 hour.</p> <p>5: A less clear agenda that is loosely tied to learning objectives and may not be achievable in 1 hour.</p> <p>0: An unclear or missing agenda that is not achievable in an hour and not tied to learning objectives.</p>	

<p>Innovation/ Creativity</p>	<p>10: Proposed session covers innovative subject matter and or is creatively structured to engage students.</p> <p>5: Subject matter is not as topical and or innovative. Session structure is less creative.</p> <p>0: Subject matter is not topical or innovative. Session structure is bland.</p>	
<p>Writing Components</p>	<p>10: Proposal is well written. Little to no spelling and/or grammatical errors.</p> <p>5: Proposal is satisfactorily written. Some spelling and/or grammatical errors.</p> <p>0: Proposal is poorly written. Many spelling and/or grammatical errors.</p>	
<p>Audience</p>	<p>10: Proposed session speaks to a diverse group of learners (i.e. appeals to students from different programs).</p> <p>5: Proposed session appeals to a small (2-3 program backgrounds) group of learners.</p> <p>0: Proposed session appeals only to one specific health profession program or background.</p>	
<p>TOTAL SCORE</p>		<p>/80</p>

Appendix F: Funding Request Packet Example

Hosted By: _____

Dear Potential Donor/Name of Contact,

On behalf of the IHI Open School's West Coast Region, we greatly appreciate your and/or [insert organization's name] financial consideration. Your donation, in addition to supporting actual conference events, will also enable learners from across our region (stretching from Colorado to Alaska) to attend this event through travel scholarships. Thank you for supporting a growing interprofessional community of learners who strive to improve health and health care together.

Sincerely,

Dear Potential Donor/Name of Contact,

The upcoming IHI Open School West Coast Regional Conference is an exciting opportunity for learners from a variety of educational institutions across multiple training programs to come together and learn about health care improvement. The success of the conference will be greatly enhanced with donations from organizations such as yours, and I hope you will be able to support our next generation of health leaders and professionals. Thank you in advance for your consideration and your generosity.

Sincerely,

DONOR INFORMATION

A Student Created Conference: Interactive, Innovative, and Interprofessional -- Be “IN”

The inaugural Institute for Healthcare Improvement (IHI) Open School West Coast Regional Conference (WCC) is a two-day interprofessional event focused on quality improvement and patient safety. The WCC will feature keynote presentations, breakout sessions, and workshops facilitated by regional and national leaders in health care improvement. In addition to these learning sessions, there will be extensive networking and professional development opportunities such as student poster presentations and hosted social events.

An International Movement

The IHI is the leading innovator in health care improvement worldwide. For more than 25 years, IHI has partnered with a growing community of visionaries, leaders, and front-line practitioners around the globe to spark bold, innovative ways to improve the health of individuals and populations. Launched in 2008, the IHI Open School provides health professions students with the opportunity to build and practice skills and knowledge in quality improvement and patient safety. The virtual educational community features online courses, resources, and a network of Chapters that organize events and activities on campuses around the world.

Local Improvement Efforts

The Portland State University (PSU) & Oregon Health & Science University (OHSU) IHI Open School Chapter was first established at PSU in 2008 and reconfigured as a joint Chapter in 2012. The Chapter has experienced tremendous growth in the last two years. We have hosted eight large-scale learning events since 2012 featuring local and national health care leaders, implemented the first “Interprofessional Quality Drive” at OHSU, and recruited over 300 faculty, learners, community members, and local professionals to join our growing network.

Our Chapter is seeking support in the form of donations to host this groundbreaking event. Your support will help to enrich the academic pursuits of today’s learners, providing the leaders of tomorrow with a foundation of interprofessionalism during a critical time in health care system transformation.

Enclosed in this packet you will find information regarding the event and documentation for donation.

JUST THE FACTS

Who Will Attend

Learners in undergraduate, graduate, post-graduate, and doctoral-level training programs in allopathic medicine, osteopathic medicine, naturopathic medicine, dentistry, nursing, pharmacy, public health, physical and occupational therapy, social work, health management, law, and business administration.

Where

The Collaborative Life Sciences Building
2730 SW Moody Ave
Oregon Health & Science University -- Portland State University
Portland, OR

Why

Despite steady progress in improving the U.S. health system, avoidable harm and wide variations in the quality of health service delivery limit the extent of that progress. Poor interprofessional collaboration can negatively affect the delivery of health services and patient care. There is a critical need to build capability across the health workforce on the methods of systems improvement, evaluation of interventions, and rapid dissemination of information. Strong partnerships among interprofessional researchers, educators, and frontline providers are crucial to satisfy this need.

Supporting the inaugural IHI Open School WCC is both a novel and worthwhile cause. This event will not only increase improvement knowledge among learners, but will also contribute to the development of future interprofessional leaders. The primary beneficiaries of the WCC are the learners who attend the conference. They in turn can share this information with other learners and colleagues in their own educational programs across the region after the conference. By increasing the number and diversity of learners with knowledge in this area, we can improve patient safety, experience, and outcomes across the West Coast Region. The WCC has important secondary benefits, as improvement is not frequently taught in health professions education. As a result, the WCC will actively fill an educational void for young health professionals, who may continue on in their careers to be improvement champions.

More Information about Our Organization

The Institute for Healthcare Improvement: <http://www.ihl.org>

The IHI Open School: <http://www.ihl.org/openschool>

Our Local Chapter: <http://www.portlandopenschool.org>

Regional Leader: wc.ihl.openschool@gmail.com

CONFERENCE BUDGET

We are offering both the proposed event budget as well as a proposed budget for student scholarships. It is our goal to lower barriers for conference attendance by both keeping this conference free to learners and offering scholarships to support travel.

Total Budget	
<i>Event Prep</i>	
Printing	
Miscellaneous	
Subtotal	
<i>Day of Event</i>	
Catering Costs	
Alcohol	
AV	
Logistics, Rentals	
Event services	
Subtotal	
TOTAL	

DONATION FORM

Thank you for your financial support of the 2015 IHI West Coast Regional Conference.

Contact Information**Organization:****Contact Name:** **Phone Number:****Mailing Address:** **City:****State:** **Zip Code:** **Email:****DONATION****Donation Amount: \$**

+

Exhibitor Cost: \$**Check is enclosed for the following (Total): \$****Please make check payable to:****Please mail this form & a single check to:****For more information, please contact: _____**