Institute *for* **Healthcare Improvement**

Management Tools for your Chapter Work

March 27, 2019
12:00 - 1:00 PM ET

Welcome!

- As we get started, please type into chat…
  - *Name*
  - *University/Organization*
  - *What brought you to this call?*
  - *Are you participating in the Recover Hope Campaign?*

WebEx Quick Reference

- Welcome to today's session!
- Please use chat to "**All Participants**" for questions
- For technology issues only, please chat to "Host"
- Follow the instructions in the pop-up box to connect your audio (either by phone, or through your computer)

Raise your hand

Select Chat recipient

Enter Text and hit send
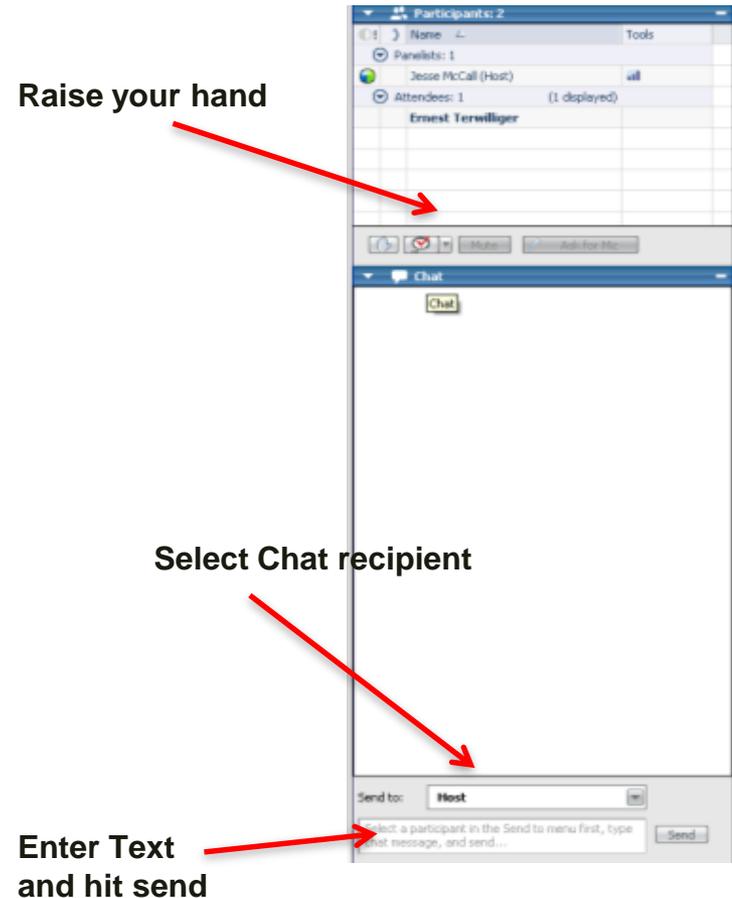
Welcome!

- **Objectives**:
  - Review key project management skills and tools with a specific focus on:
    - Setting measurable aims and SMART goals
    - Using timelines and Gantt charts
    - Tactics for relational strategizing/relationship management, distributed leadership, and team building
  - Provide space to discuss these skills in a facilitated example
  - Identify and commit to what your Chapter will leverage long term, and what you can do by next Tuesday!

Today's Agenda

- Welcome and Introductions
- IHI Open School Overview
- Management Tools for your Chapter
- Project Example from Towson University
- Discussion
- Debrief and Next Steps

Help us get to know you!

In the chat box, select "All Participants" as the recipients and share:

- *Name*
- *University/Organization*
- *What brought you to this call?*
- *Are you participating in the Recover Hope Campaign?*
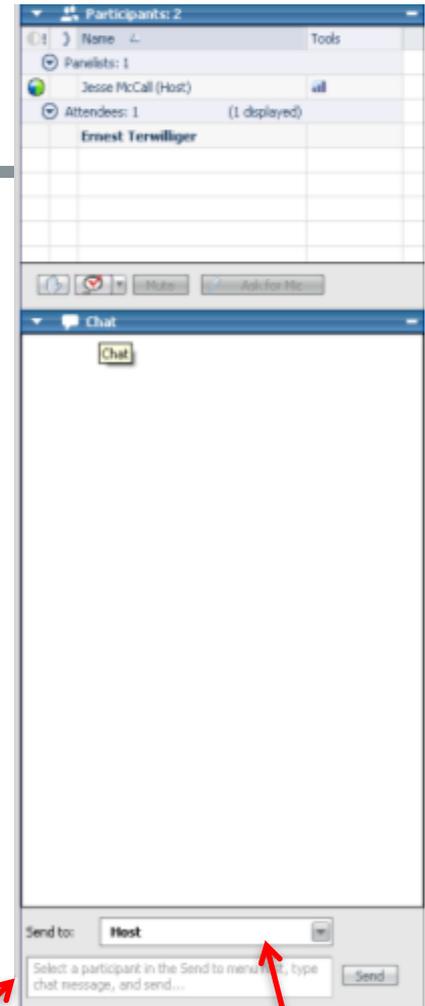
Enter Text

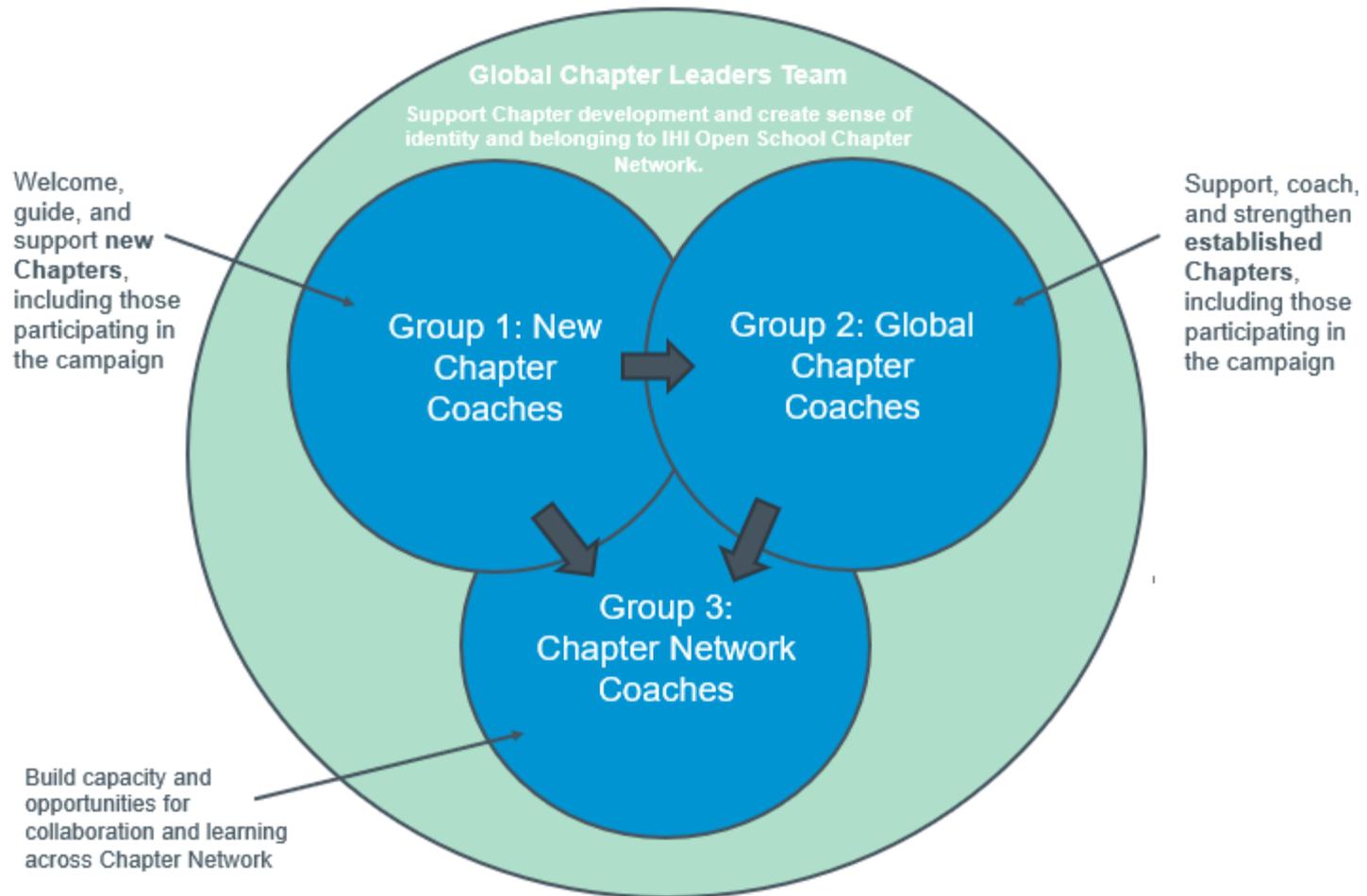**Select Chat recipient**

IHI Open School Team

Gina Deitz
Senior Program
Manager, IHI Open
School

Hannah Flath
Program Coordinator,
IHI Open School

Global Chapter Leaders

Global Chapter Leaders Team

Support Chapter development and create sense of identity and belonging to IHI Open School Chapter Network.

Welcome, guide, and support **new Chapters**, including those participating in the campaign

Support, coach, and strengthen **established Chapters**, including those participating in the campaign

Group 1: New Chapter Coaches

Group 2: Global Chapter Coaches

Group 3: Chapter Network Coaches

Build capacity and opportunities for collaboration and learning across Chapter Network

Introductions

Emileigh Canales, MPH
Quality Improvement Analyst,
Campaign Faculty, Campaign
Leadership Team

Meghan Cowden, RN
Chapter Network Coach
Former Chapter Leader at
Purdue University

Kristen Swain, BSN, RN
Performance Improvement
Project Manager,
Chapter Network Coach

Our Mission

"Advance quality improvement, patient safety, and leadership competencies of health and health care professionals worldwide."

Online Courses

- **30+** online courses in Improvement Capability, Patient Safety, Person- and Family-Centered Care, Triple Aim for Populations, Leadership – all free to students, residents, and faculty
- **More than 700,000** students and residents registered on IHI.org and taking courses
- **More than 4 million** course completions
- **More than 1,500** institutions use the courses as a core part of their training programs or curriculum
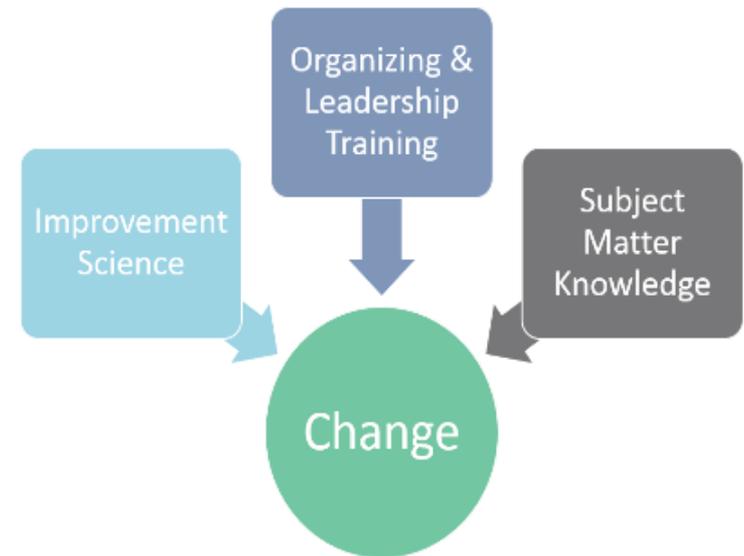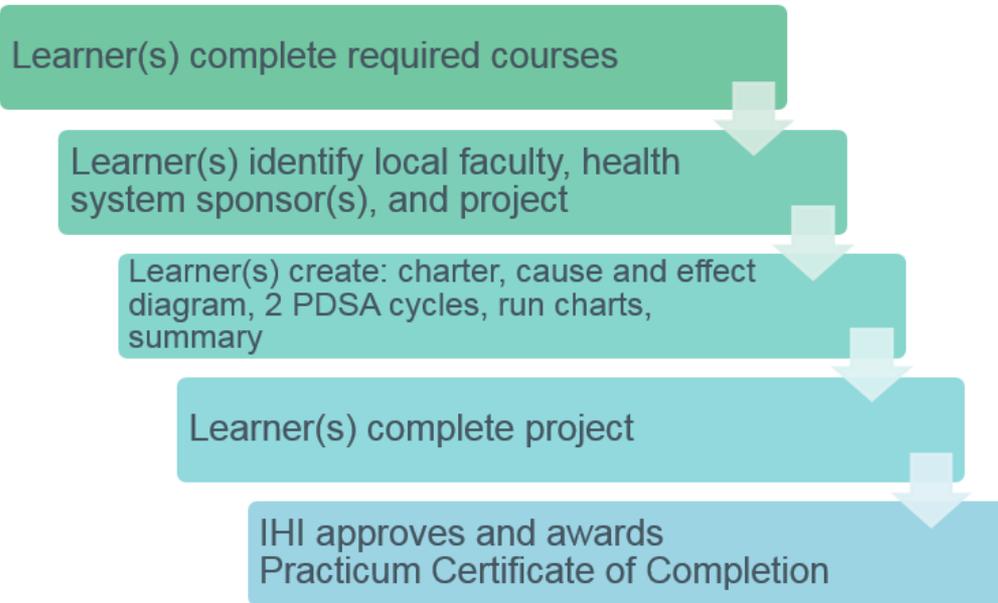
Institute for Healthcare Improvement
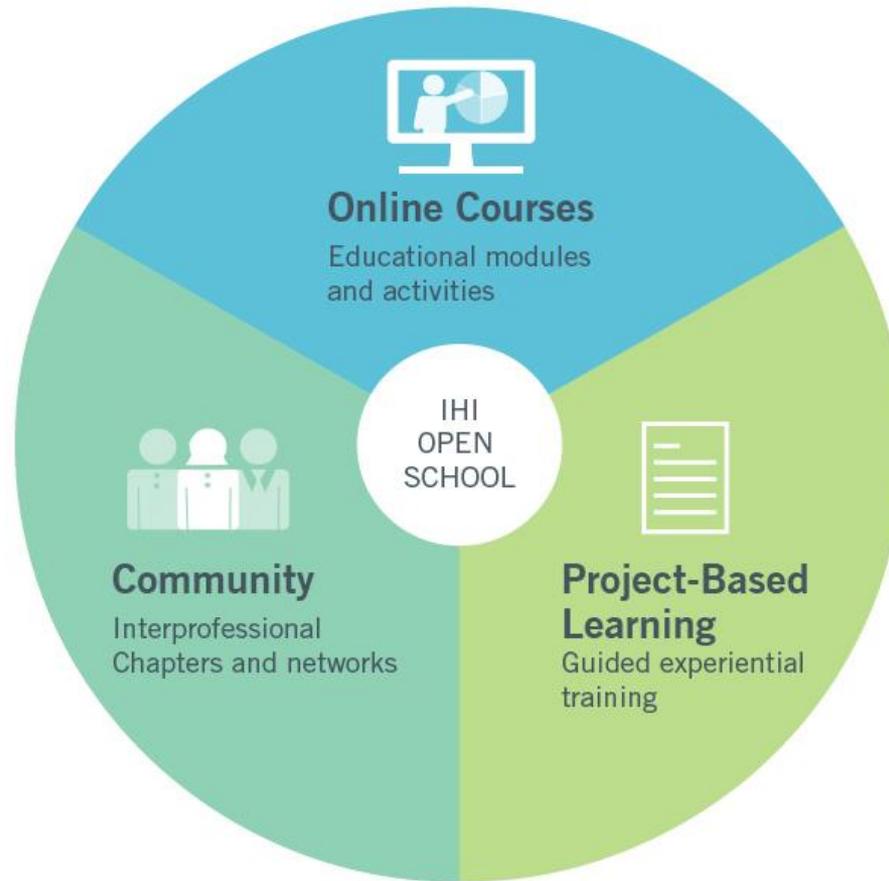
Certificate of Completion

IHI OPEN SCHOOL

This certificate is awarded to

James Smith

In recognition of successful completion of the basic curriculum comprising 23.5 hours of online learning in the areas of

IMPROVEMENT CAPABILITY, PATIENT SAFETY, LEADERSHIP, PERSON- AND FAMILY-CENTERED CARE, TRIPLE AIM FOR POPULATIONS, AND QUALITY, COST, AND VALUE

In support of improving patient care, the Institute for Healthcare Improvement is accredited by the American Nurses Credentialing Center (ANCC), the Accreditation Council for Pharmacy Education (ACPE), and the Accreditation Council for Continuing Medical Education (ACCME), to provide continuing education for the healthcare team. The activity was designated for 0.00 hours of AMA PRA category 1 credit.

Derek Feeley
President and CEO
Institute for Healthcare Improvement

20 University Road, 7th Floor, Cambridge, MA 02138   t 617 301-4800   ihi.org

Project-Based Learning

Quality Improvement Practicum

Leadership & Organizing for Change

Learner(s) complete required courses

Learner(s) identify local faculty, health system sponsor(s), and project

Learner(s) create: charter, cause and effect diagram, 2 PDSA cycles, run charts, summary

Learner(s) complete project

IHI approves and awards Practicum Certificate of Completion

Improvement Science

Organizing & Leadership Training

Subject Matter Knowledge

Change

Our Strategy

Our Strategy

Online Courses
Educational modules and activities

Community
Interprofessional Chapters and networks
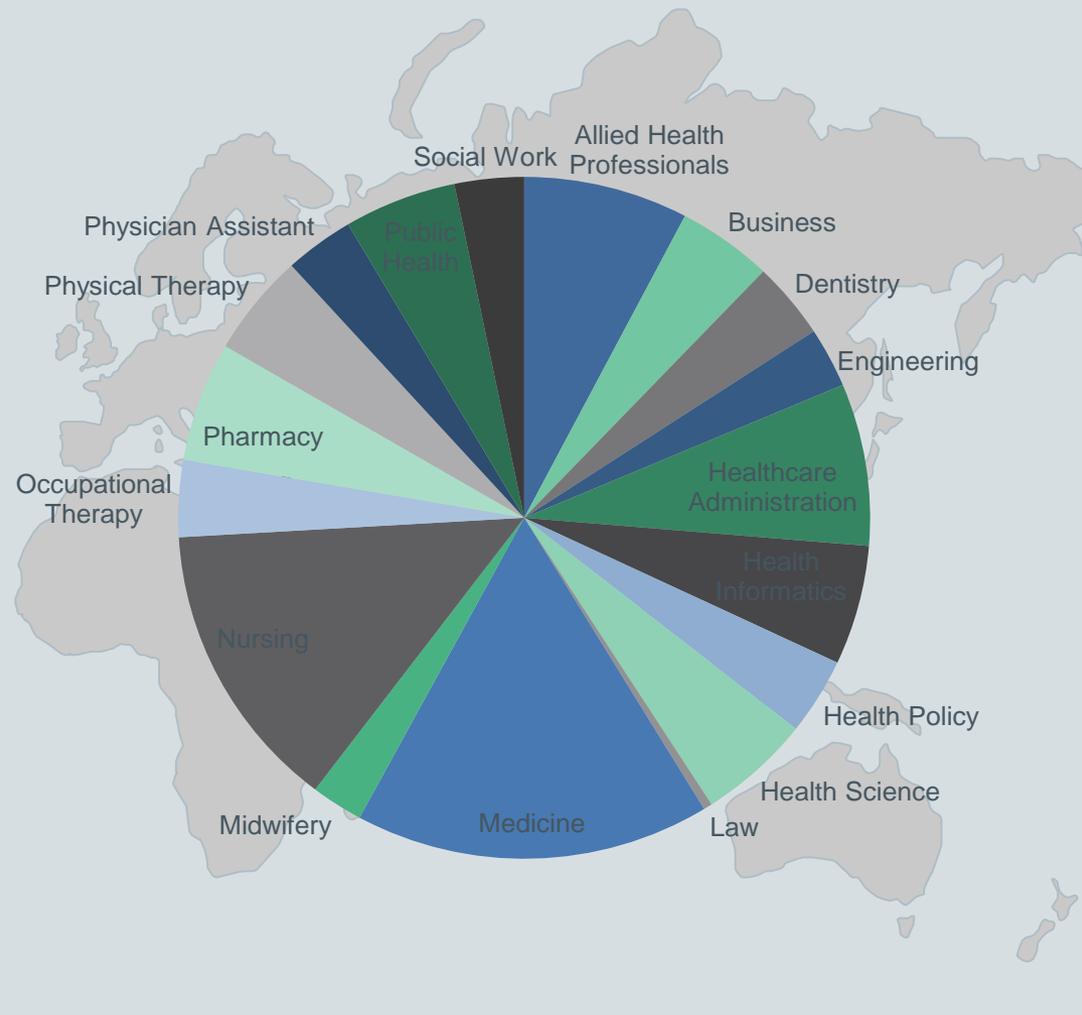
Project-Based Learning
Guided experiential training
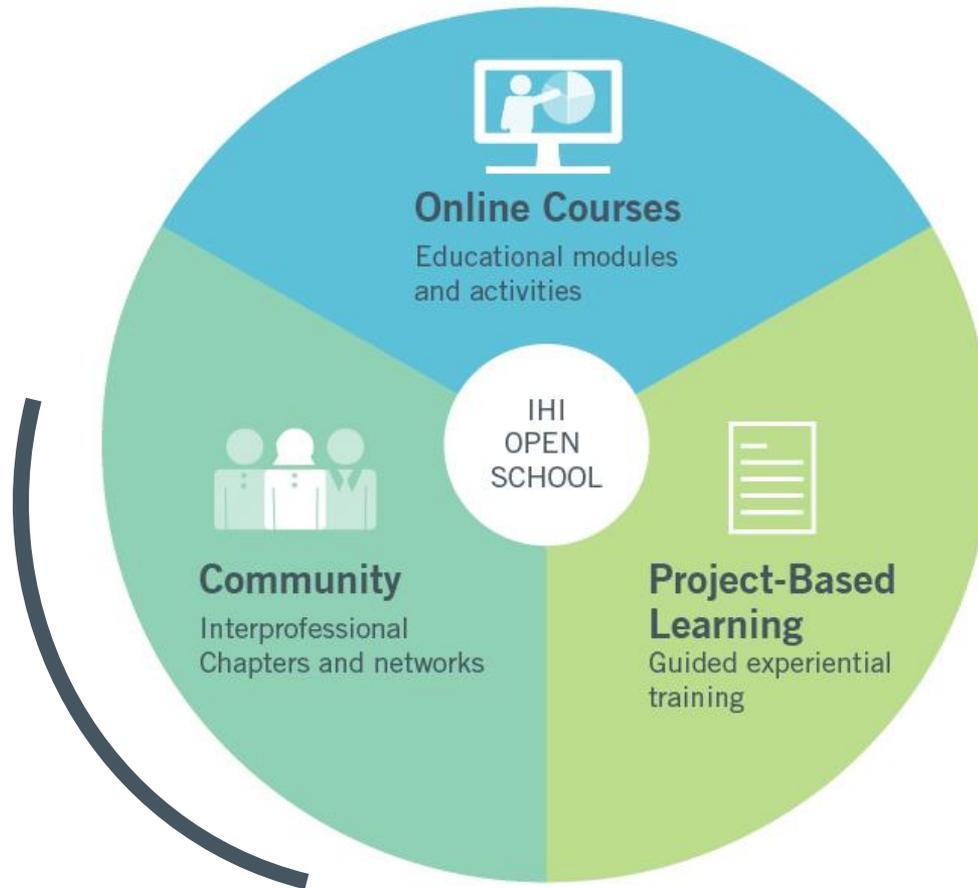
IHI OPEN SCHOOL

IHI Open School Community

- **700,000+** students and residents registered
- Over **940** Chapters started in **over 95** countries
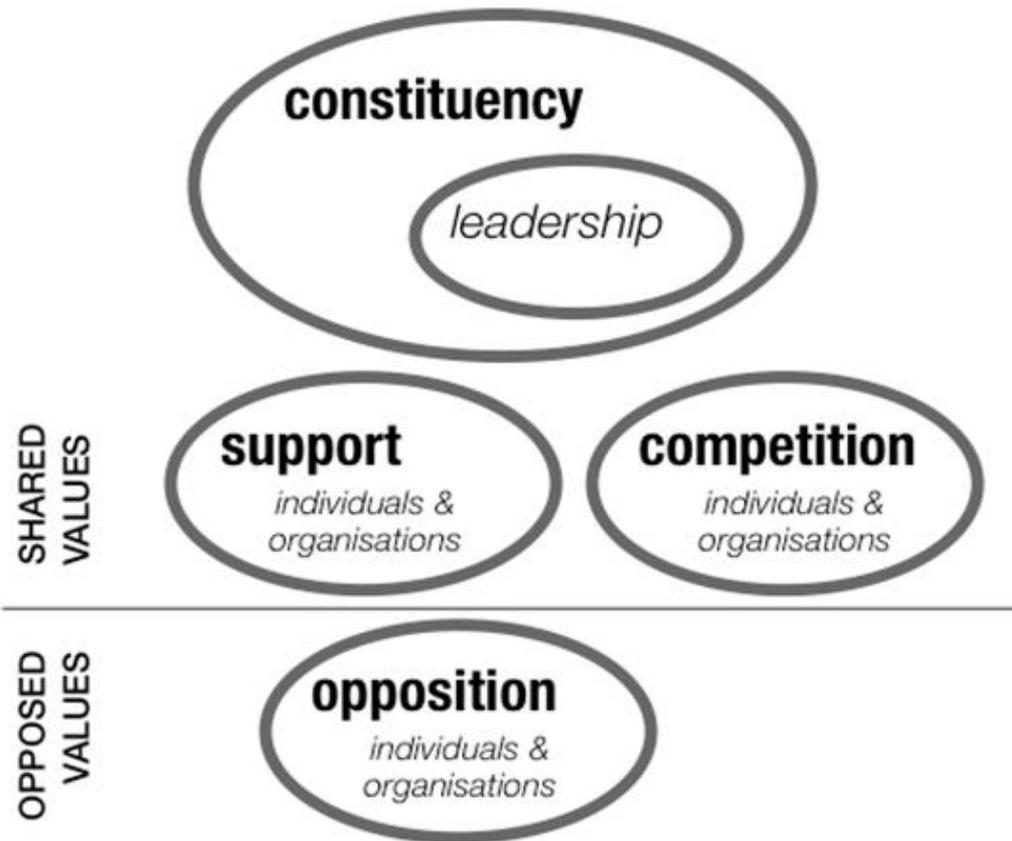- Over 50% of our Chapters are interprofessional

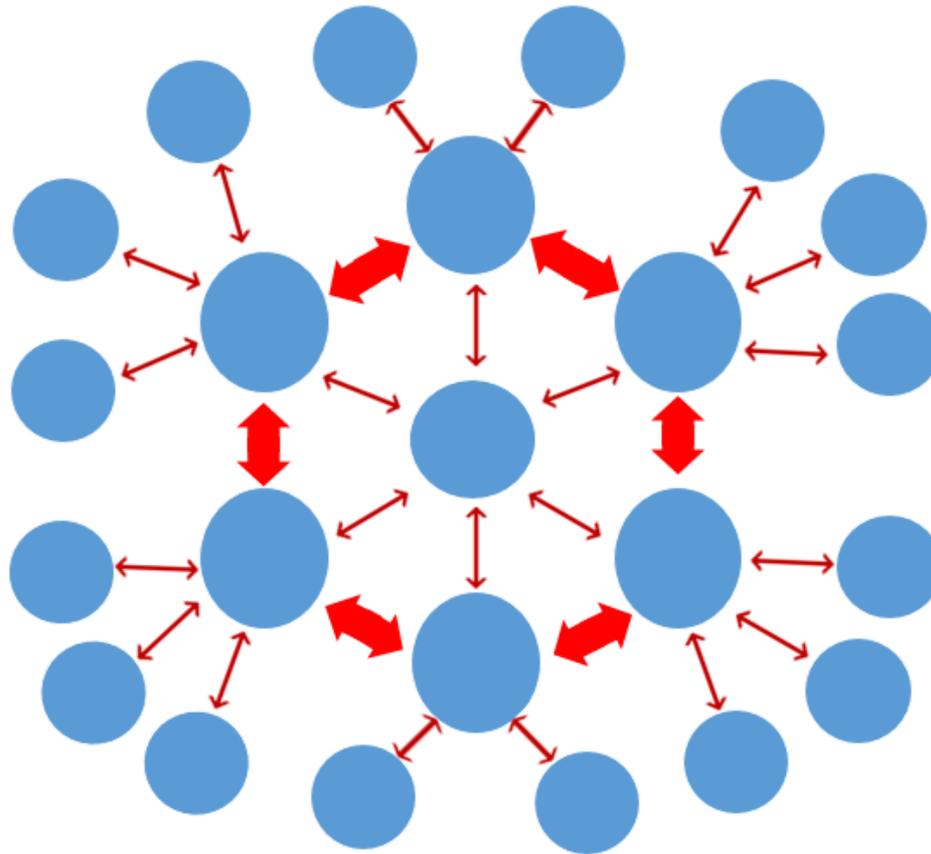# Project Management Tools

Step 1: Organize your People!

Wait… Who are our people?

Step 1: Organize your People!

Build a team with **distributed leadership** based on shared values.

Step 2: Setting Aims

SMART Goals:

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**imely

Example of a SMART Goal: students and leaders with the Recover Hope Campaign aim to collect 20,000 signatures on the Change the Narrative pledge by May 15, 2019 to change the narrative on substance use disorders.

Step 3: Plan your Approach

Gantt Charts and project timelines help keep the project organized and moving forward while also visually distributing responsibility among the team.

Example:

IHI Open School Canadian Chapter Network Conference

Gantt Chart

| | | Project Start Date: | | | | Jan-19 | | | | Feb 19 | | |
| | | 01/07/19 | | | Week of: | | | | | | | |
Week	Major Milestones / Deliverables	Start Date	Target End Date	Actual End Date	Status	7-Jan-19	14-Jan 19	21-Jan 19	28-Jan 19	4-Feb 19	11-Feb 19	18-Feb 19
1	Holding R&R conversations with Manager and Phase 4 Observations	01/07/19	01/11/19	01/14/19	complete	complete						
1	Team Meeting #1 (team building and process observations)	01/07/19	01/11/19	1/7/19, 1/17/19	scheduled	complete						
1,2	Observations	01/07/19	01/25/19	02/01/19	complete	in progress	complete					
2	Current state Process Mapping	01/14/19	01/18/19	01/24/19	complete		complete					
3	Kick -Off Meeting - RFA, Metrics	01/14/19	01/18/19	01/25/19	complete		complete					
1,2	Current and Target State Metrics	01/14/19	01/18/19	02/21/19	complete		complete	in progress	in progress	in progress	in progress	complete
3	Complete Gap Analysis	01/14/19	01/18/19	01/31/19	complete				complete			
4	Team meeting #2 (2 hours)	01/21/19	1/25/19	1/24/19	complete			complete				
4	Solutions and PICK chart	01/28/19	02/01/19	02/01/19	complete				complete			
5	Team meeting #3 (2 hour)	01/28/19	02/01/19	01/31/19	complete				complete			
5	Experiment Sheets	01/28/19	02/08/19		in progress				in progress	in progress		

Timelines

Campaign Timeline

Campaign Aim
April 2020

Collective
Action #3
*February
2020*

Evaluation &
Next Steps
*April – June
2020*

Race to
Recover
Hope
*October
2019*

Change the
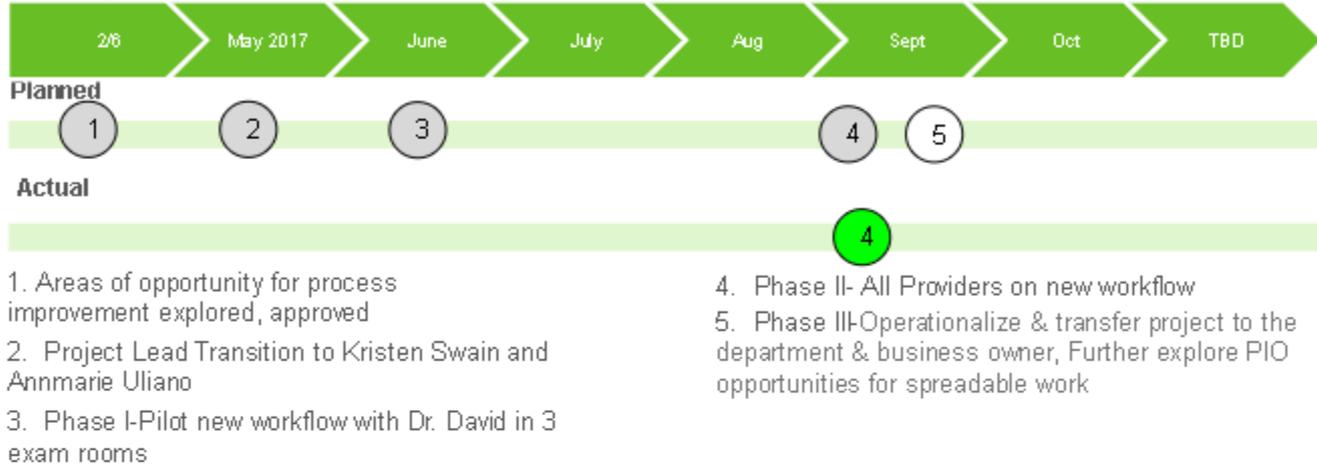Narrative
Competition
April -May 2018

Campaign
Launch
December 2018

Allergy And Immunology Performance Improvement Project

PM Kristen Swain,
Associate PM- Annmarie Uliano

Key Milestones

2/6 | May 2017 | June | July | Aug | Sept | Oct | TBD

Planned

1   2   3   4   5

Actual

4

1. Areas of opportunity for process improvement explored, approved

2. Project Lead Transition to Kristen Swain and Annmarie Uliano

3. Phase I-Pilot new workflow with Dr. David in 3 exam rooms

4. Phase II- All Providers on new workflow

5. Phase III-Operationalize & transfer project to the department & business owner, Further explore PIO opportunities for spreadable work

Summary

Planned End: *December 2017*

Overall Project Status As of:
9/13/17

🟢 🟡 🔴

Project Description:

The purpose of this project is to improve patient access and workflow in the Allergy and Immunology Department by aligning resources to meet patient demand.

Scope:

- In Scope: Burlington and Peabody Allergy Clinics (Patient Access, Workflow, Layout, Supply and Demand Analysis, Strategic Plan)

- Out of Scope: Movement to new facilities

Activity in the past 30 days

- Stakeholder meeting – Next Steps
- ROI analysis finalized, agreed to, and approved
- Implemented Team Huddles
- Template Changes
- Pilot room redesign
- Equipment order completed
- Construction Quotes
- Baseline Metrics Defined

Upcoming Key Activities (Next 30 days)

- MD admin time decision
- Med Room Redesign
- Exam Room Standardization
- Capital budget expansion decision
- PIO involvement moving forward

Risks to Critical Path

- Clinician agreement to template changes
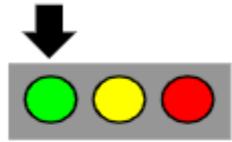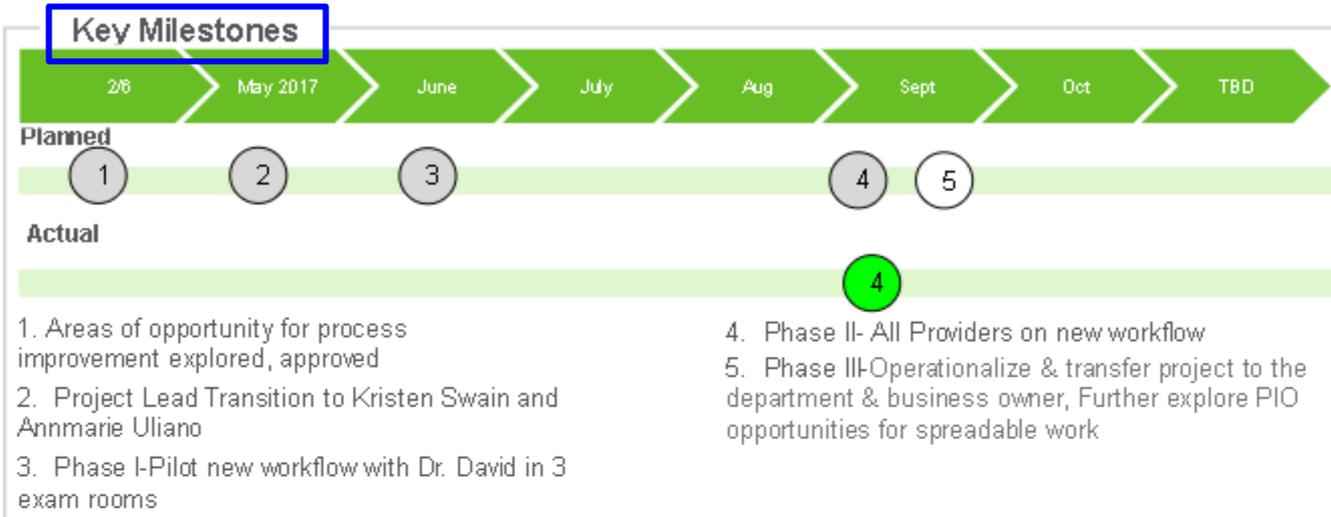- Staff readiness
- Adoption of revised workflow

Decision / Guidance Required

- Budget Approval

Key Milestone Legend: ▢ Originally planned   ▣ Completed activity   🟢 On track; will complete as planned   🟡 Planned delivery at risk   🔴 Will miss planned delivery

Lahey Health

PERFORMANCE IMPROVEMENT

Allergy And Immunology Performance Improvement Project

PM Kristen Swain, Associate PM- Annmarie Uliano

Key Milestones

2/6	May 2017	June	July	Aug	Sept	Oct	TBD

Planned

① ② ③ ④ ⑤

Actual

④

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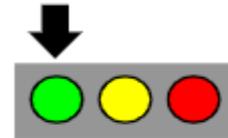- Capital budget expansion decision
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Lahey Health

PERFORMANCE IMPROVEMENT

Step 4: Working with your People

1:1 meetings: to identify & recruit leaders and get to know our constituency

House meetings: to build community around the effort

Leadership team & Chapter meetings: to build relationships between those leading the work

Action events: to build relationships among those taking action

Leadership trainings: to introduce relationship building as a skill

Virtual meetings: allows for more flexibility and connection regardless of team location

Project Example

New Beginnings: Towson University Chapter of the IHI Open School

March 27, 2019

Marsha Davenport, MD, MS, MPH, FACPM

Wendy Whitner, PhD, MPH

Today's Objectives

- Describe the process for forming and managing our Chapter
- Share some lessons learned
- Discuss areas for improvement and next steps

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Building the Chapter in Academia

- Identify committed faculty advisors
- Plan-Plan-Plan
- Seek support from academic leadership
  - Program Director
  - Department Chair
  - Dean

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Building the Chapter in Academia, Continued

- Identify target audience
  - Undergraduate students
  - Graduate students
  - Faculty
  - Staff
  - Alumni
- Who are your champions?
  - Internal
  - External

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Building the Chapter in Academia, Continued

- Funding the Chapter
  - University grants
  - External grants
  - Event sponsorship from the IHI Open School
- Leaving a legacy: Sustainability
  - Strategic plan
  - Integrate into academic curriculum
  - Develop faculty and alumni as mentors
  - Link to University resources such as student government
  - Grow membership and engagement
  - "Trend"

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Strategic Planning

- Began meeting with students in September
- Held Saturday Retreats 3 times in the Fall
- Required students to complete Open School modules by early December
- Completed Mission, Vision and draft goals by early December
- Used Driver Diagrams
- Completed and approved Charter/By-laws and submitted to student government

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Strategic Planning, Continued

- Planned kickoff learning event for February 2019
- Held Holiday Open House in early December and recruited new members
- Conducted Saturday retreat in January to complete goals and action steps
- Conducted Leadership Training for Executive Board
- Established regular bi-weekly Wednesday meetings for general membership
- Bi-weekly Saturday meetings for the Executive Board

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Strategic Planning, Continued

Mission: *As a united front, we will empower the next generation of leaders dedicated to improving healthcare.*

Vision: *Our TU IHI Chapter will be at the forefront of quality improvement initiatives transforming healthcare globally.*

Our Chapter Values

- Leadership
- Innovation
- Interprofessional
- Diversity and Inclusion
- Empowerment and Growth

- Dedicated Life-Long Learning
- Integrity
- Experiential Learning
- Evidence-based Practice

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Example of One of the Five Goals

Goal 2: By the end of Fall 2019, 80% of the Chapter members will obtain at least the IHI Open School Basic Certificate in Quality and Safety

Lessons Learned

- Establishing a chapter is hard work
- It is fun!!!!
- Need to find support and resources at many levels
- Think about sustainability from the start
- Just ask

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Areas for Improvement

- Better communication and spreading the word
- Additional leadership training for students
- Engage more faculty to see the value
- Continue to seek new Champions and resources
- Interact with other chapters

Next Steps

- Track progress on goals to date
- Prepare for additional learning events this semester
- Start working on improvement projects
- Continue to recruit new members
- Enjoy the journey because you know you will make a difference!

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Let's discuss!

Let's put these skills to action!

Situation: you're on a call with your colleagues to plan for a Chapter Network Call on management tools for Chapter projects and Chapter work. Sound familiar?

- How can we run this meeting effectively?
- What needs to be accomplished during this meeting?
- Which management tools would be helpful for us to put into practice during this meeting?

Project / Meeting	Chapter Network Call: Management tools
Date / Time	March 27th 12-1pm
Location	Virtual
Facilitator	Kristen Swain
Timekeeper	
Minutes	
Conference Call	620 974 552
Google Meet	https://ihi.webex.com/ihi/k2/j.php?MTID=tb102e716fafe259b1914091f8dbb26be

Invitees / Attendance Tracking							
	Hannah Flath			Emileigh Canales		Kristen Swain	Meghan Cowden

✓ = Attended meeting   ☎ = Attended by phone   ✗ = Did not attend   NR = Not required

Agenda			
Topic	*Time*	*Owner*	*Minutes*
Review Team Norms	2 mins	Kristen	
Insights from today's lesson	10 mins	All	
Review next steps	3 mins	Kristen	

Debrief and Next Steps

10 minutes

Learn more about the Recover Hope Campaign!

IHI Open School Recover Hope Campaign Strategy

We aim to improve the lives of 50,000 people affected by substance use disorders by April 2020

AWARENESS
Raise awareness and reduce stigma with a focus on equity

PREVENTION
Prevent substance use disorders and unhealthy substance use

TREATMENT & RECOVERY:
Improve treatment for individuals with substance use disorders

1. Change the Narrative
Sharing stories to raise awareness of substance use disorders as a chronic disease, reduce stigma, and confront systematic oppression underlying substance use

2. Save Lives from Overdose
Train individuals to recognize overdoses and intervene by administering naloxone

3. Improve Pain Management
Support best practice opioid prescribing and alternative pain management in health systems

4. Reform University Curricula
Promote education and training on prevention, diagnosis, and treatment of substance use disorders into university curricula

Take part in the Change the Narrative Challenge

- **What**: a friendly competition across our networks to get 20,000 people to commit to change the narrative on substance use disorders by signing the pledge
- **Who**: teams (Open School Chapters, your organization or institution, or your group of friends and fellow change agents)
- **When**: April 15 – May 15, 2019
- The team who collects the most signatures on the pledge will be eligible for a prize, which will be shared soon!

What can you do?

- Commit to change the narrative on substance use disorders with us and [sign the pledge!](#)
- [Sign up to participate in the challenge](#) with your team (your OS Chapter, organization or institution, or group of friends and colleagues)
- Share the pledge with your networks
- Email openschool@ihi.org with questions

Challenge Toolkit coming soon!

Recover Hope Campaign Resources

- Starter Kit coming soon!
- Campaign Action Guides on the [Recover Hope Campaign website](#)
  - Change the Narrative
  - Save Lives from Overdose
  - Improve Pain Management
  - Reform University Curricula
- Learn more about Substance Use Disorders [here](#)
- Connect with a Global Chapter Leader for coaching by emailing newchaptercoach.ihi.os@gmail.com if you're a new Chapter or emailing globalchaptercoach.ihi.os@gmail.com if you're an established Chapter

Chapter Resources

- The Chapter Leader Toolkit has a wealth of information on planning and hosting events, managing teams and projects, and designing your leadership structure

- This Sample Charter can be used to identify your Chapter's aims and organizational tactics

- Check out this video for more information on how to be an effective team leader and this resource on how to run productive meetings

- Quick QI Tool: this Project Planning Form helps teams think systematically about your projects and planning process

What can you commit to do by next Tuesday?

Post in the chat one thing you will do by next Tuesday (or sooner!) to lead your Chapter in taking action or applying skills you learned on today's call!

Thank you!