Certificate Training Program: Session 8

Institute for Healthcare Quality, Safety, and Efficiency

Welcome!: Before We Start

- Sign-in at the back
- Pick up handout packet
- Put on your name tag
- Sit with your CTP team at your assigned table
Team-Led Check-in + Reflection on Practice

**Key Question:** What are we learning, and how can we make the most of today’s session?

**Curriculum Theme:** Empathy & Humble Inquiry + Translating Insight to Action

**Skills:**
- Check-in
- Storytelling
- Setting expectations
“A Special Retreat”
Today’s Objectives

1. Walk through an example of how to create a business case for a QI project

2. Begin developing the outline of a business case for your project

3. Explore how providers are paid

4. Understand the connection between provider payment and quality

5. Begin developing an approach to data collection for your QI project
Guide to Mid-Year Presentations
Presenting your Work

6/26 Session Devoted to Sharing Updates on Projects
• Share your journey
• Get useful input/feedback
• Practice presenting your message

~15 min per team: 10 to present, 5 for discussion

Follow a framework! (use these slides)
Slide 1: Team Name

**Team Symbol**  (need to create)

Tell us:

- What it is
- How it represents your team
- How you chose/designed it
AIM Statement: What problem are you trying to solve?

(Include your vision/elevator pitch here)
Your sense of urgency:

- Why should people beyond your CTP team care about this problem at this time?
Slide 4: Managing Stakeholders

Guiding Coalition:

• Who have you convinced to join this effort?
• Why did you pick those people?
• Which executives have you involved?
What have you completed on the QI/PI checklist?

- Project Charter
- Detailed “As Is” process map
- Data collection plan
- Business Case
- Elevator Speech
- Baseline measures
- Stakeholder Analysis
- Communication Plan
- Executive Stakeholder Sign-off/Approval that IRB is (or is not) necessary
What barriers have you encountered?

List 2-3 questions you have for your CTP peers

(*Focus on getting useful ideas, advice*)
Guidance

• We will send a couple of example mid-year presentations from prior teams

• Work with your coach to prepare

• If you have a preferred presentation time, fill out the sheet at the back
Questions?
Creating a Project Business Case

Read Pierce & Jennifer Wiler

Key Question: How do we convince senior decision-makers, who have all the money, to support our project?

Curriculum Theme: Systems Thinking + Empathy and Humble Inquiry

Skills:
* Perspective-taking
* Recognizing Cone-in-the-Box
* Financial Analysis
* Storytelling
Break

Systems thinking

Translating insight into action

Transformation (individual, team, system)

Empathy and humble inquiry

Resilience and human performance
Clinical Revenue

Jennifer Wiler

**Key Question:** How do providers get paid for their care, and what does this have to do with quality?

**Curriculum Theme:** Systems Thinking + Empathy and Humble Inquiry

**Skills:**
* Perspective-taking
* Recognizing Cone-in-the-Box
* Financial Analysis
* Storytelling
Break

Systems thinking

Translating insight into action

Transformation (individual, team, system)

Empathy and humble inquiry

Resilience and human performance
QI & Project Management: Finding and Using Data
Sarah Caffrey

Key Question: What should we do next to advance our project?

Curriculum Theme: Transformation + Translating Insight into Action

Skills:
* Using a Roadmap for Improvement Projects
* Using Quality Theory to Change a Process
Appreciative Debrief

Read Pierce

**Key Question:** What are we learning, and how can we make the most of the next 2 weeks?

**Curriculum Themes:** Resilience & Human Performance + Translating Insight to Action

**Skills:**
* Reflection
* Goal-setting
* Appreciation
Next Steps by mid-June

*(Details to follow via email)*

1. **Due Today**: turn in eval, nametag

2. **Advance your Project work**
   - Get senior stakeholder approval
   - Finalize your project team
   - Analyze a workflow using PI tool(s)
   - Complete a formal business case
   - Begin gathering data about baseline performance
   - Create a team symbol

3. **Fill out sheet at the back if you have preferences about presentation times 6/26**
2018 CTP Ground Rules

Expectations of Participants

- Hold each other accountable to the ground rules
- Minimal side conversations
- One person speaks at a time
- Phones on vibrate
- Laptops for IHQSE notes only
- Step out to take calls
- Respectful interactions, be open to other points of view
- Food and drink any time
- Be present
  - Do what you need to do to be present

Expectations for Program

- Hold each other accountable to the ground rules
- Time for breaks
- Start and end on time
- Materials distributed ahead when possible/useful
- Faculty be present
  - Minimal side conversations