CCI | CENTER FOR CARE INNOVATIONS

Leading Profound Change Webinar:
Clinic Experiences with Change Management
November 12, 2019

Webinar Reminders
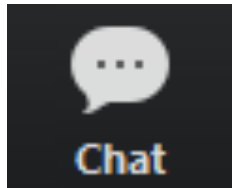
1. Everyone is UN-muted; please be aware of your background noise!

2. Join us by video by clicking the **Start Video** button.

3. Remember to chat in questions along the way! Use the chat window **Chat** to ask/answer questions.

4. Webinar will be recorded, posted on the PHLN website, and sent out via a follow up email.

Agenda

1. Welcome & Introductions

2. Recap of Leading Profound Change Webinars

3. Managing Change

4. Serve the People Community Health Center

5. Vista Community Clinics

6. Wrap Up & Evaluations

Leading Profound Change: Webinar Series

1 Brainstorming Techniques

2 Journey Mapping

3 Prototyping

4 PDSA

5 Leveraging Multiple Tools to Address Primary Care Issues

6 Clinic Experiences with Change Management

Christi Zuber

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Christi, PhD, MHA, RN has over 20 years of experience leading teams, observing and partnering with users, creatively generating ideas and conducting field experiments to develop solutions that work at organizations.

She founded Kaiser Permanente's Innovation Consultancy and is a faculty member at Northwestern University.

Profound Change

Blending methodologies to lead change

Overview

- What we should know about change and how to effect, influence and help lead it

- Tangible methods to help frame up the problem and help to solve it in a way that leads to more lasting change

- 2 case examples from our peers

How might we

(re)discover
(re)learn
(re)appreciate

**The melody of methods in our world
to lead change and innovation?**

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The **failure** of large scale transformational change is **rarely due** to the content or **structure of the plans** that are put into action.

Well…why DOES it fail?

The nature of **change is changing**

Researcher: Edward deBono- Mental Valleys

> " Changing behavior is less a matter of giving people analysis to influence their thoughts than helping them to see a truth to *influence their feelings*.
>
> The heart of change is in **the emotions**.

John Kotter (2002), The Heart of Change: Real-Life Stories of How People Change Their Organizations. Harvard Business School Press

Understand the way behavior change happens and how giving people a starting place in both the logical and the emotional sense may be our best bet.

Rider and the elephant.
https://www.youtube.com/watch?v=X9KP8uiGZTs

IHI's 7 principles for leading change

IHI's study in social movements in health, has found that these seven engagement principles are key when organizing people to lead change and face uncertainty, both in and outside of health care settings.

- **Know why you care**. Motivating others to join in action requires answering 2 questions: (1) What will we do? and (2) Why should we do it? Knowing *what we will do* is a matter of strategy. Knowing *why we should do it* is a matter of heart.

- **Clarify purpose**. On the basis of shared motivations, develop a mutual purpose together. When people perceive and — better yet co-create — a clear and consequential purpose, they work for their own benefit as well as the interests of the whole.

- **Share power.** Listen to the wisdom of those who are closest to what needs to change. Those with lived experience of a problem have the power to solve it

- **Celebrate courage**. Leaders foster the conditions for change by identifying exemplary behavior. Senior leaders should publicly celebrate innovators and early adopters who show courage and take initiative.

- **Move to action** — **quickly**. It is better to make a small-scale, low-stakes change and see what happens than to get paralyzed in preparation and analysis. PDSA cycles and prototyping for example.

- **Build a coaching culture**. The change process is hard. The best change-makers seek coaching and give coaching, creating room for everyone to improve their skills over time.

- **Count engagement**. Build a culture of (ac)countability. Measure health outcomes, but don't stop there. Count networks engaged, partnerships formed, leaders developed. Count new ways of thinking and acting, and new cultural norms forged.

http://www.ihi.org/communities/blogs/leading-change-seven-principles-to-guide-your-work

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Why a human-centered change is important

You don't even know…It's so rare that people tell us _why_ we're doing what we're doing. Usually, they just say, 'here, this is what we're doing now.' And it is even more rare that people ask us what we think about the idea, and how it might be better."

Med-Surg RN

http://www.ijdesign.org/ojs/index.php/IJDesign/article/view/928/336

Understand how adoption and change may happen differently for different people. Learn how adoption unfolds and what drives each group

The Adoption Curve
https://www.youtube.com/watch?v=9QnfWhtujPA

Discussion/comments about change

How do you see personal change connecting with organizational change?
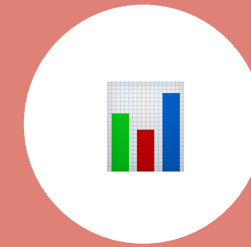How do you see your role in that work?
How (or how well) are our organizations set up to articulate purpose vs measure outcomes?

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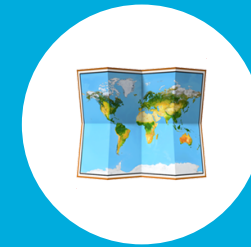
- 2 case examples from our peers

Methods used in Our Series

HCD Lean Improvement Science

Scaffold and try ideas

PDSA cycles

Brainstorming

Prototypes

Share through storytelling

Aim statements

Problem Statements

Run charts

Demonstrate connectedness

Driver diagrams

Gemba walk

Co-design

Build empathy

Ethnographic observations

Journey maps

Visual controls (huddle board)

Tools that help you build empathy

Ethnographic Observations

Utilizing tools and approaches to create many divergent and creative ideas around a topic.

Journey Map

Moving from an idea into a physical form or an acted out simulation that helps people to contribute and provide feedback.

Visual Controls

Cues to allow quick recognition of the information being communicated to increase clarity and communication about the change

Tools that help you share through storytelling

Aim Statements

The change you seek, how you will know if you achieved it and over what period of time.

Problem Statements

The problem you are trying to solve though the voice of the person it will impact (ex. patient, staff, community member)

Run Charts

Showing data plotted over time in a chart to help identify if a change has occurred based on the number of data points above/below a set threshold

Tools that help demonstrate connectedness

Driver Diagrams

A tool used to help identify what ideas might lead to a change by mapping the drivers of the impacts.
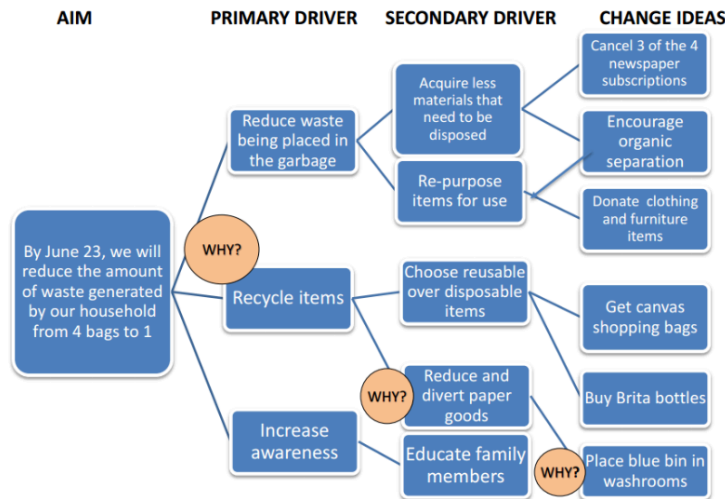
Gemba Walk

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Co-design

The problem you are trying to solve though the voice of the person it will impact

Tools that help you scaffold and build ideas

4. Act	1. Plan
Adapt	Objectives
Adopt	Questions and make predictions
Abandon	Plan for data collection
Changes for next test cycle	Plan for test cycles (who, what, where, when)
3. Study	2. Do
Analyze the data	Execute the plan
Compare data to predictions	Document problems and observations
Summarize what was learned	Gather data for analysis

Model for Improvement developed by
Associates in Process Improvement © 1996
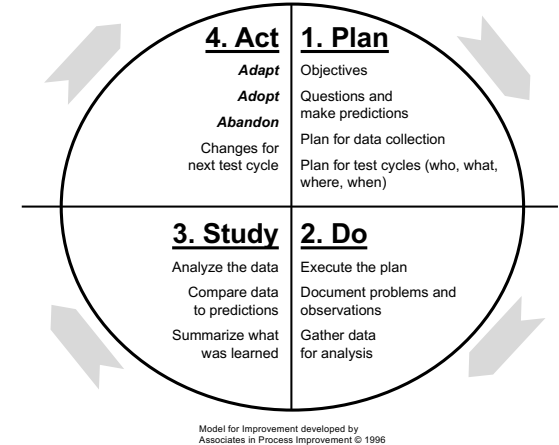
Brainstorming

Utilizing tools and approaches to create many divergent and creative ideas around a topic.

Paper Prototypes

Moving from an idea into a physical form or an acted out simulation that helps people to contribute and provide feedback.

PDSA Cycles

Rapid learning cycles that include the stages of plan, do, study, act which provide a roadmap for testing ideas with people.

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Co-design ●

Share through storytelling

Aim statements ●

...

Journey maps

Visual controls (huddle board) ●

Listen to the next 2 speakers and note:

- Which, if any, of these methods did they use?
- What leadership principles did they seem to employ when guiding the change?
- What thoughts, questions or advice would you have for them?

Serve the People Community Health Center

What is one change you worked on in the PHLN?

Not changing the focus, but refining it!

Diabetes → SDH → Diabetes

1. *State assessment*
2. *Mini PDSA'ing*
   - *Fielding the Survey*
   - *Patient involvement*
   - *Resource Database*

What challenges have you faced testing or implementing your change?

- *Competing responsibilities & limited time*
- *Staff turnover*
- *Not fully knowing how to respond to logistical matters*
  - *Who will be available & appropriate to administer surveys*
- *Not knowing what to expect from our patients*
  - *How acceptable was this to our patients*

What strategies or tools have helped you mitigate challenges and manage your change?

- *A3 assessment*
- *Concrete milestones*
- *Mini PDSA'ing*
- *Patient Advisory Group*
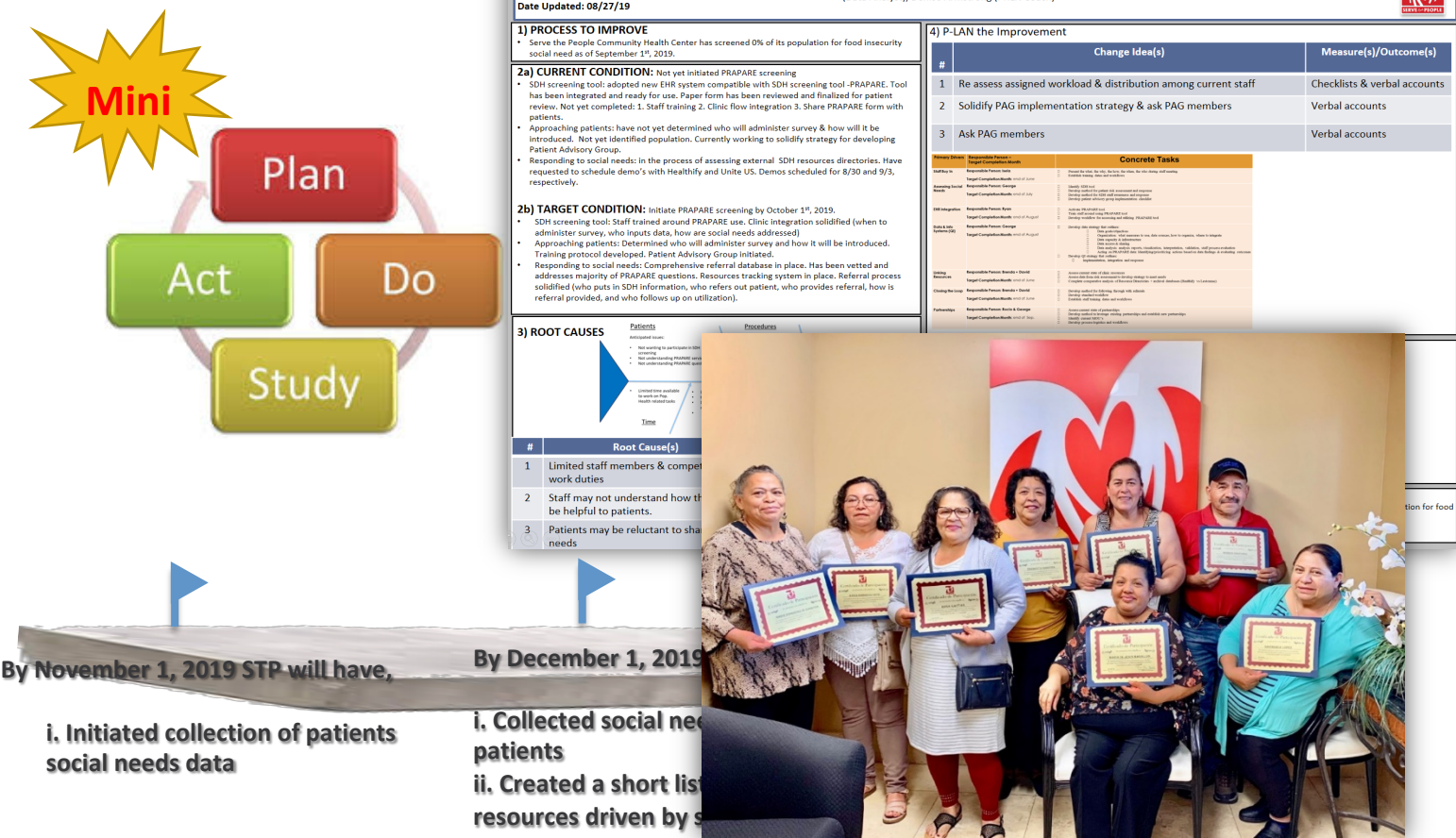
What words of wisdom or insight can you share with the PHLN team?

- *Going the distance- PHLN coaches and CCI website*
- *Setting clear goals and milestones*
- *Valuing the smaller, simpler steps*
- *Being open to the uncontrollable, to change, to trouble shooting!*
- *Patient involvement is a win-win*

Questions and Reflections for Serve the People

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Vista Community Clinic

What is one change you worked on in the PHLN?

- Identified the PHQ 9 as the most appropriate screening tool to achieve accurate scores. This screening tool will be able to identify at-risk adolescents and provide them with support that they require.

  - Medical assistant (MA) provides laminated tool to the teen. This ensures that an accurate PHQ 9 screening tool is completed in the exam room.

  - Team changed screening tool requirement from January to December.

What challenges have you faced testing or implementing your change?

- Year 2 project team turnover

- Clinical staff turnover - retraining of project workflow

- Clinician concerns about inflation of at-risk adolescents

- Protective parenting - not allowing adolescent to complete the screening

- Lack of staff commitment

What strategies or tools have helped you mitigate challenges and manage your change?

- Switching directly to the PHQ-9 and skipping the PHQ-2
- No matter the circumstances, our team regularly meets on the designated day and time to review project updates
- Having pediatrics director onboard
- Identifying a core pediatric department team to help increase staff buy-in
- Additional check-in by the team, trainings, observations, and discussions about questions and concerns
- When adding a new clinician to the pilot, we utilize a current clinician on the core team to provide training

What words of wisdom or insight can you share with the PHLN team?

- Have good communication with the entire team
- Strategic formulation of staff

Questions for Vista

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Visual controls (huddle board) ●

Reflections and words of wisdom for peers

The nature of **change is changing**

And we are learning how to change with it.

PHLN Reminders for Dec 5th In-Person

By Nov 15: Register here by the end of the week if you haven't yet!

By Nov 26: Submit your storyboard to meaghan@careinnovations.org. You have been emailed the template slides, but you can also find them on the program page:

https://www.careinnovations.org/phln-portal/activities/phln-learning-session-3/#pre-work

Thank You!

For questions regarding today's content, contact:

Christi Zuber
christi@aspenlabsnetwork.com

For CCI questions, contact:
Meaghan Copeland
meaghan@careinnovations.org

Please fill out the
post-webinar survey linked
in the chat box!

Thank you!!!