

PROJECT TEAM GO GUIDE

A Guide to Kick Start
Your Project Team

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WELCOME!

The Patient Centered Value System (PCVS) requires us to view care as it is experienced by patients and families, to build teams that reimagine the ideal, and to codesign impactful solutions. By engaging and connecting patients, families and caregivers, we improve outcomes and experiences while reducing costs at UPMC and beyond. The PCVS is the transformational approach that will help you to redesign and then implement systemic change.

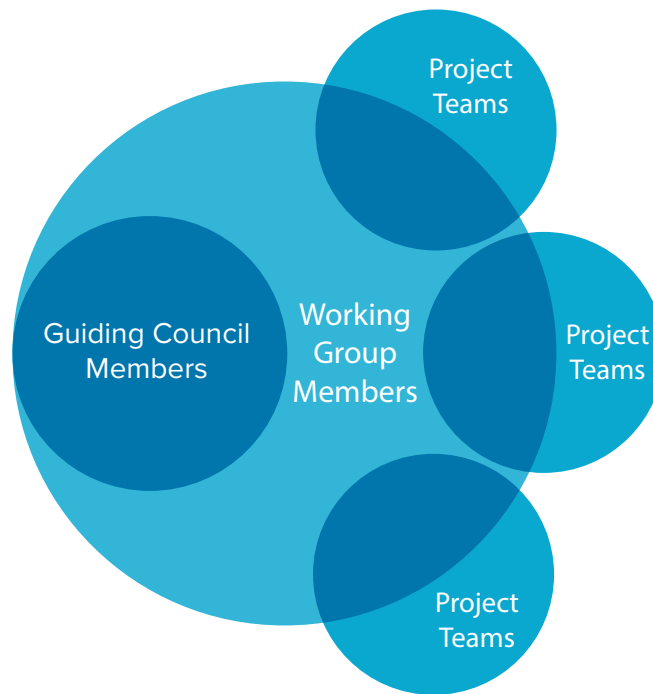
By reading and using this Project Team Go Guide, you will learn how to form your Project Teams and get started transforming the current state into the ideal state.

We look forward to collaborating with you on this journey.

Sincerely,

The UPMC Innovation Center Team

SUPPORT FOR YOUR PROJECT TEAM



The organization of teams within the Patient Centered Value System (PCVS) means that you are never alone on your journey toward improved care experiences. The Guiding Council serves as the foundation that supports the Working Group. Together, Guiding Council and Working Group members have already followed the six steps of the PCVS, and have shadowed to evaluate the current state. Shadowers have mapped out the patients' and families' care experience flows, captured the patient's perspective, and identified opportunities for transformation of the care experience. With this information, the Working Group will form and guide multiple new Project Teams through the same six steps to examine the current state, compare this to the ideal story, and work together to close the gap.

Congratulations on being selected to serve on a Project Team! Some of you already participate with the Working Group and some of you are new. This is by design. The ideal Project Team has a unique balance – 50% are members who come from the Working Group and 50% are members from outside of that group. This design ensures you have a team with greater diversity, scope, and involvement and that members can spread the use of PCVS, then become champions themselves. This Project Team Go Guide will serve as your team's reference to help you capture all of the important elements of your projects.

The Project Team Go Guide includes:

- Glossary of Terms
- Project Team Rules to Play By
- Six Steps to Organize and Lead a Targeted PCVS Project
- Suggested Information for your Project Team to Capture
- Detailed Worksheets at the End of this Guide
- How to “Fast Track” a Project

Glossary of Terms

Care Experience: (*noun*) */ker/ /,ik'spireans/

Everything and everyone that leaves an impression on the healthcare journey; always defined through the eyes of patients and families

Care Experience Flow Map: (*noun*) */flo/ /map/

A map, chart, graphic, or table that shows the movement of patient and family through a defined care experience with touchpoints, caregivers, timestamps noted

Touchpoint: (*noun*) */teCH, point/

Key moment or place where patient and family care experiences are directly or indirectly affected by any caregiver

Caregiver: (*noun*) */'ker, giver/

Anyone in the healthcare setting who impacts the experiences of patients and families

PROJECT TEAM RULES TO PLAY BY

1. Prioritize your projects based on patient and family needs. Don't forget "blue sky" thinking.
2. Consider "pilot" projects first (smaller scale, shorter time frame). Do not shy away from creative solutions. This is the opportunity to try new things! If your idea is successful, you can increase the scale.
3. Provide progress updates at the Working Group's meetings. The Working Group serves as a resource and can assist if the Project Team experiences barriers or challenges. The PCVS Coordinator will maintain lists of active, completed, and future projects.
4. If funding is needed, present Value Fund proposals to your Working Group for approval. Finding creative low or no cost solutions is always encouraged.
5. Project Teams can disband once the goals have been achieved and maintained. New Project Teams form when new projects are identified.

SIX STEPS TO ORGANIZE AND LEAD A TARGETED PCVS PROJECT

Step 1: Select a project based on the needs of patients and families.

Step 2: Assign Project Team co-leaders.

Step 3: Shadow patients and families to co-design the care experience. From your shadowing information, create a Care Experience Flow Map to show the touchpoints and caregivers that patients and families encounter.

Step 4: Recruit members of the Project Team based on touchpoints and caregivers.

Step 5: Create a shared vision of the ideal story.

Step 6: Close the gaps between current and ideal.

"FAST TRACK" A PROJECT TO 30-DAY IMPLEMENTATION

If, after completing steps one and two, the Project Team feels there is an urgent need to enact a change (perhaps it is an issue of patient or staff safety), the project may need to be “Fast Tracked.” Project Team Co-Leaders should propose the Fast Track to the Guiding Council. The Guiding Council can approve the Fast Track and recommend administrative or clinical champions who could facilitate urgent improvements or changes.

Additional meeting time will need to be scheduled to begin Fast Track projects. A four-hour block of time is recommended so that the Fast Track Project Team can follow steps 3-6 of the Six Steps to Organize and Lead a Targeted Project Team, and then determine a pilot group and setting.

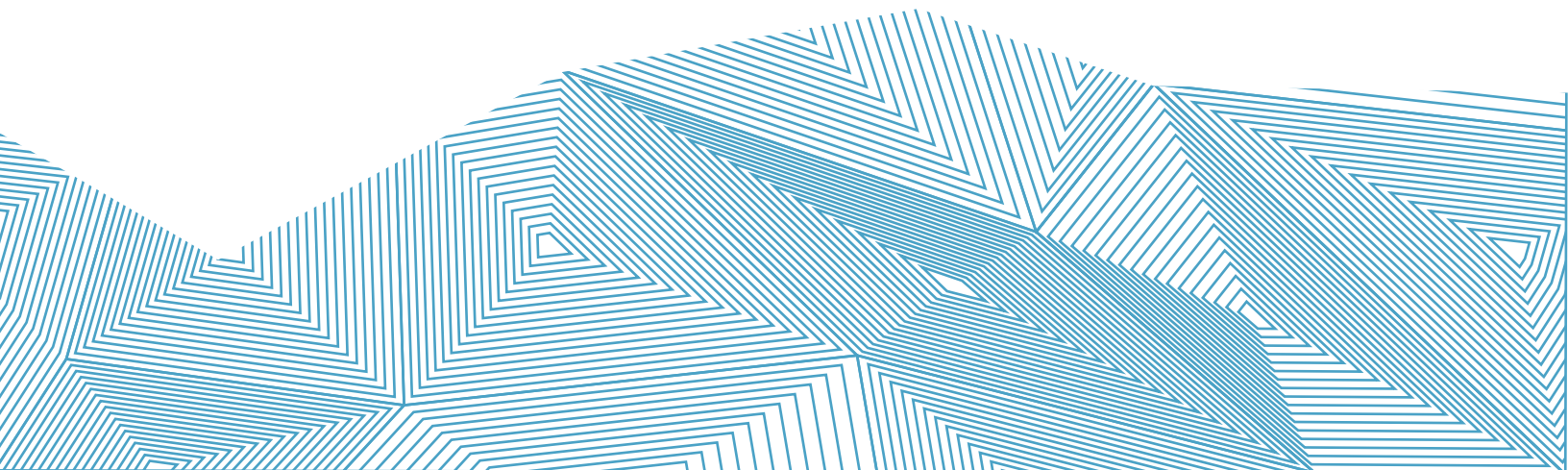
At the next Working Group meeting, Fast Track Project Team representatives should report decisions and share a plan to launch the pilot project. Within thirty days, the Fast Track project should be implemented in the pilot departments or units.



SUGGESTED INFORMATION FOR YOUR PROJECT TEAM TO CAPTURE

A designated Project Team member will need to track and record progress at each of your Project Team meetings. This information will be used to provide updates to the Working Group. The Working Group will provide ongoing support and will serve as a resource to help you overcome obstacles and barriers during project implementation.

Included at the end of this Go Guide are worksheets for each of the six steps for successful completion of a PCVS project. By completing these forms for each project, you will have a record of the steps your team took to envision, implement, and evaluate sustainable solutions. These records should be archived and shared with the Guiding Council and Working Group and other Project Teams who might benefit from your efforts. Although your Project Team may want to include more information, the worksheets are a useful reference and will keep your team moving forward. Additional copies of the worksheets are available online at www.discoverdrd.com.



STEP 1: SELECT A PROJECT BASED ON THE NEEDS OF THE PATIENTS AND FAMILIES

PCVS Working Group Name: _____

Proposed PCVS Project Name: _____

☐ Traditional Project ☐ Fast Track Project

Approximate start date of this PCVS Project: MM_____ DD_____ YY_____

Choose from the list below that the category best describes your PCVS Working Group:

☐ Inpatient ☐ Employee/Staff ☐ Physician Office

☐ Outpatient ☐ Clinic ☐ Other

Please describe why you chose this project: _____

Was this project “borrowed brilliantly” from another PCVS Working Group? ☐ Yes ☐ No

Which of the PCVS Value Trifecta does this project address (check all that apply):

☐ Impact the patient/family experience ☐ Improve clinical outcomes ☐ Reduce cost

Choose a category that best describes your project from the list below:

Experience:

- ☐ Cleanliness
- ☐ Patient flow
- ☐ Process flow
- ☐ Clinical
- ☐ Responsiveness
- ☐ Communication
- ☐ Patient amenities
- ☐ Signage/wayfinding
- ☐ Environment
- ☐ Facility design
- ☐ Patient Engagement
- ☐ Other_____

Outcomes:

- ☐ Medication
- ☐ Care giver engagement
- ☐ Discharge process
- ☐ Patient education
- ☐ Staff education
- ☐ Transition in care
- ☐ Other_____

Cost:

- ☐ Staff efficiency
- ☐ Supplies
- ☐ Waste reduction
- ☐ Other_____



STEP 2: ASSIGN PROJECT TEAM CO-LEADERS

Project Team Co-leader Name: _____

Position: _____

Contact Information: _____

Project Team Co-leader Name: _____

Position: _____

Contact Information: _____



STEP 3: SHADOW PATIENTS AND FAMILIES TO CO-DESIGN THE CARE EXPERIENCE

Project Name: _____

Answer the following questions related to ***the above project only***.

Where does the care experience for this project begin? _____

Where does the care experience for this project end? _____

The following questions pertain to the goShadow app and web platform. Answers to these questions will help future teams learn from your shadowing strategies.

goShadow “group” name: _____

goShadow “group” admin: _____

Number of shadowing experiences within the above group: _____

Shadower(s): _____

Did you break the shadowing into segments or shadow the entire care experience from beginning to end?

If you broke the shadowing into multiple segments, list the segments below:

In what other ways was the patient and family story captured? Check all that apply:

☐ Patient and Family Letters/Comments

☐ Leadership Rounds

☐ HCAHPS Scores

☐ Informal Surveys

☐ Existing Reports (please specify): _____

☐ Others: _____

Describe the current state. Refer to your goShadow “opportunity” and “accolade” reports.
What is working well for patients, families, and caregivers? What needs to change?



STEP 4: RECRUIT PROJECT TEAM MEMBERS

The most effective Project Teams are formed with the people who impact the care experience. Remember...

Touchpoint: (noun)

Key moment or place where patient and family care experiences are directly or indirectly affected by any caregiver

Caregiver: (noun)

Anyone in the healthcare setting who impacts the experiences of patients and families

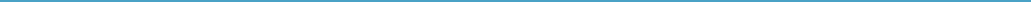
From your shadowing information, identify all of the touchpoints and caregivers that impacted the patient and family experience. Use these places and people to recruit members for your PCVS Project Team. When your team is made up of caregivers who are connected to the patient experience, you will ensure the team and its projects have the greatest impact.

Touchpoint	Caregiver	Email Address	New PCVS Member? (Yes or No)

When forming your Project Team, remember the “50/50 rule.” You’ll want to invite people from inside and outside of the PCVS Working Group to participate on the Project Team, striving for a 50/50 mix.

_____ % of Working Group members on the PCVS Project Team

_____ % of Non-Working Group members on the PCVS Project Team



Now that you've formed your Project Team, it's time to update the shared vision by writing the ideal patient and family care experience for the PCVS project as if you were the patient and family member.

How will your team create the Ideal Story?

- ☐ Collectively in 1-2 Project Team meetings
- ☐ Project Team brainstorming session with a designated member taking the ideas and writing the story
- ☐ Start a narrative story and each member contributes a sentence until the story is complete
- ☐ Use a segment from the PCVS Working Group ideal story

☐ Other ways: _____

[illegible]

*If needed, please continue writing the ideal story on additional pages. Attach those pages to this worksheet when complete.



STEP 6: CLOSE THE GAPS BETWEEN THE CURRENT AND IDEAL

Your Project Team may have multiple project solutions that help reach the ideal state. Whichever one(s) you choose, please share your detailed implementation plan.

Title of pilot project: _____

Enter a short description of the pilot project solution.

Why did you decide on this project solution?

What is the desired outcome? How will you evaluate your results?

Describe any challenges or barriers that you anticipate. How will you overcome them?

Who will “re-shadow” after implementation to see if the project is working?



POST-IMPLEMENTATION FOLLOW UP

Congratulations, your PCVS project is complete!

The UPMC Innovation Center commends you in achieving the value trifecta: improved clinical experiences and clinical outcomes along with reduced costs. With your hard work on this PCVS project, you helped create the ideal care experience for patients, families and staff. Please share your success story with co-workers and other PCVS project teams!

1. Working Group name: _____

2. Project Team/Project name: _____

3. Project contact person: _____

4. Contact person's email: _____

5. Which of the PCVS Value Trifecta does this project address (check all that apply):

☐ Impact the patient/family experience ☐ Improve clinical outcomes ☐ Reduce cost

Choose a category that best describes your project from the list below:

Experience:

- ☐ Cleanliness
- ☐ Patient flow
- ☐ Process flow
- ☐ Clinical
- ☐ Responsiveness
- ☐ Communication
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- ☐ Other_____

Cost:

- ☐ Staff efficiency
- ☐ Supplies
- ☐ Waste reduction
- ☐ Other_____

7. Approximately what date did you complete this project? (mm/dd/yy)_____

8. Briefly describe your project including the original “opportunity for improvement and the implemented change:

9. Was your project successful? ☐ Yes ☐ No (Skip to question 9d)

If yes:

9a. How did you measure your success (i.e. re-shadowing the patient and family experience, pre- and post-surveys, etc.)? What specific metrics did you use?

9b. What worked well for your project team? _____

9c. What key components would someone need to know to replicate your project idea?

9d. What barriers or roadblocks did you encounter that prohibited your success?

9e. Will your Project Team attempt this project again in the future? ☐ Yes ☐ No



9f. What will your team do differently next time? _____

10. How do you plan on sustaining this project? _____

11. Do you have photos, videos or testimonials related to this project? ☐ Yes ☐ No

12. Will/should this project be published? ☐ Yes ☐ No

13. Have you developed a slide presentation for this project? ☐ Yes ☐ No

14. Did you use PCVS value funds to pilot this pilot? ☐ Yes ☐ No

14a. If yes, how much? _____

15. Did you receive grant funding from another source to help this project? ☐ Yes ☐ No

15a. If yes, by whom was the project funded? _____

15b. How much money was awarded? \$ _____

