Co-Design Champion and Shadowing Train the Trainer Program
Outline and Objectives

Purpose: Over the course of this 12-week program, participants will be trained in clinically proven co-design methodologies and tools to improve and hardwire a culture that supports and measures person-centered care practices and workforce wellbeing.

Application of co-design tools and coaching opportunities will be encouraged through person-centered partnerships with hospital-based and community partners. At the conclusion, attendees will be presented with a Co-Design Champion certificate.

METHOD

goShadow will deliver **six 60-minute co-design champion and shadowing train the trainer sessions and six 60-minute coaching sessions** virtually.

OBJECTIVES

At the conclusion of the 12-hour training program, the champions will have completed the following objectives:

- Learn the history and science of co-design and its application in health care through methodologies such as the Patient Centered Value System.
- Apply evidence-based and clinically-driven patient improvement tools aimed to engage all stakeholders from the boardroom to the exam room.
- Be introduced to ways to capture soft data through perception mapping, motivational interviewing, and empathy building. Follow the same process to capture hard data.
- Become an objective viewer. Learn how to combine and assess hard and soft data to represent all stakeholders' voices.
- Develop specific expertise in performing and applying patient shadowing and coaching as tools to measure the impact of person-centered tests of change on workforce wellbeing and culture.
- Deeply empathize with patients, families, and frontline care teams through collecting emotional, qualitative, and quantitative data from all stakeholder's points of view.
- Document and report 360° views of patient journeys objectively to understand the true current state, identify gaps (silos) in care, and generate human-centric ideas to solve them by involving all stakeholders.
- Learn how to co-create, write, and enact (through small tests of change) an ideal care experience with patients and clinical teams' voices equally represented.
- Communicate with patients and care teams the purpose of shadowing and why shadowing and other co-design tools will change the way that they think about their work and expectations for care to be delivered. Feedback data and next steps frequently to all stakeholders.
- Learn best practices, practical how-tos, tips, and tricks to apply co-design methodologies to any care experience or clinical setting at scale.

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Sample Weekly Training Topics and Curriculum:

- Content Session 1: Foundations of Co-Design: What is co-design? What methodologies support co-design? How does it help with outcomes, person-centered team building, and improvement?
    - Action Assignment Coaching Session 1: Receive coaching on pilot selection and scope of care experience. Select pilot organization, unit/OPD, and key clinical and non-clinical stakeholders with which to partner for the program.
- Content Session 2: Key co-design tools, observational techniques, and how to apply them in any care setting.
    - Action Assignment Coaching Session 2: Select 1-2 co-design tools (perception mapping, did well/do better, ideal state writing, patient journey mapping, motivational interviewing, and gap assessment) to apply to selected pilot experience or a personal experience. Present, review, and debrief with the coaching team.
    - Review FAQs around shadowing: Are you a secret shopper? How not to interfere in a patient's experience. How to engage employees in real time. Getting consent. How not to place blame. How/if to incorporate focus groups or patient and family advisory councils.
- Content Session 3: Flipping the conversation: Ask What Matters to patients and care teams to engage and generate ideas for person-centric and experience-driven change.
    - Action Assignment Coaching Session 3: Ask 2-3 patients and care team members What Matters survey questions. Present findings and receive coaching on ways to incorporate feedback into action planning.
- Content Session 4: What is the Patient Centered Value System (PCVS)? Review overview and steps 1-3: Discover the Current State through patients' and families' eyes. Application of shadowing tool and methods through training videos to objectively and empathetically "see" through any stakeholders' eyes.
    - Action Assignment Coaching Session 4: Observe 1-2 patients in selected pilot care experience. Present and review recorded findings. Debrief observations and feelings from patients, families, and providers.
- Content Session 5: Deep dive into Shadowing. Practical guidance (who, what, where, and when), goal setting, motivational interviewing, and review of care experience-specific approaches using hard and soft data. Review analysis and aggregation of hard and soft data into domains, review did well/do better opportunities.
    - Action Assignment Coaching Session 5: Debrief shadowing experiences and how to communicate findings with clinical and administrative stakeholders through reporting. Develop and provide pilot team with reports (flow maps, time studies, opportunity and accolade reports) and recommendations for next steps. If opportunities for improvement exist, engage key stakeholders to form patient-centered working group.
- Content Sessions 6: Recruit and engage patient-centered teams. Deepdive into selected shadowing pain points and associated data to identify low hanging fruit and how to build a project list with the pilot team. Iteratively re-shadow and ask What Matters to measure financial, emotional, and outcomes-oriented impact on patients and employees.
    - Action Assignment Coaching Session 6: Perform gap analysis, and write the ideal state for selected experience from patient's and employee's points of view. Determine what is needed to go from the true current to the ideal state and how

to measure your way there.

- Review of Training and presentation of certificate. How to blueprint and scale ideal pathways at the same time as continuing to engage frontline teams, clinicians, and administrators through best practice sharing, asking What Matters, shadowing, and data analysis.

Who should attend?

Clinical and Non-Clinical Champions:
Identify champions who are well-respected and enthusiastic catalysts for change to help lead the effort. Consider physicians, administrators, managers or staff who are inspiring and passionate about transforming care delivery. While it is always suggested to form a team to maximize immediate benefit to the organization, individual champions are always welcome and encouraged to network with other attendees.

Want to send a team? Here's the type of people who should attend for the greatest impact:
There is no set number required in each category.

1. **Administrative Champion or Co-Champions:**
   a. These are managers, directors, administrators, and executives who demonstrate the organization's commitment and serve as high-level resources and catalysts for removing barriers.
2. **Clinical Champion or Co-Champions**:
   a. Consider physicians, clinicians, nurses, and technicians involved with the care experience who will inspire colleagues to make and sustain needed changes. Also, involve Champions from non-clinical areas such as human resources, housekeeping, food services, etc.
3. **Coordinator**:
   a. The primary organizer, record-keeper, communicator, and connector for the team.

Additional Options (additional fees apply):
If requested, a site visit can be made in 2021 to build person-centered teams, to deep dive into application and practice of learned concepts (below), as well as to collect, aggregate, and analyze qualitative and quantitative shadowing data-real time.

Virtual and project-specific coaching can be offered for teams that include data collection, aggregation, analysis, and improvement coaching.

Fees:

Individual fees are $1500 for the course. Discounts are offered upon inquiry and for teams. Customized training for organizations is available upon request. Please email info@goshadow.org for additional information.