Project Management Basics

Basic knowledge of leadership expectations for continuous improvement

Module 6

Online or single module version
Approximate time to complete: 30 minutes

Updated May 2016

COURSE INFORMATION

Title: Project Management Basics– Module 6: Basic Knowledge of Leadership Expectations for CPI

Target Audience: Sharp HealthCare affiliated physicians, pharmacists, and other healthcare providers interested in continuous process improvement

Educational Objectives: Following this activity, learners should be able to:

- Outline expectations for project management at Sharp
- Describe the role leadership plays in supporting and facilitating project work
- Explain the Project and Team Charter
- List several tools a Project Manager could use for planning and running a project

Principal Faculty: ***Kathy Summers***
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Sharp HealthCare

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CME Credit: Sharp Healthcare designates this internet enduring activity for a maximum of **.5** *AMA PRA Category 1 Credits*™ after successful completion of the module with a minimum passing score of **100%**. Physicians should only claim credit commensurate with the extent of their participation in the activity.

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UAN: 0571-0000-016-023-H04-P or 0571-0000-016-023-H04-P

Cultural and Linguistic Competency: This activity is in compliance with California Assembly Bill 1195 which requires that all CME activities comprising a patient care element include curriculum addressing the topic of cultural and linguistic competency. The intent of this bill is to ensure that health care professionals are able to meet the cultural and linguistic concerns of diverse patient population through effective and appropriate professional development. Cultural and linguistic competency was incorporated into the planning of this activity.

Type of Activity: Internet Enduring Material with learning assessment and evaluation

Release Date: June 1, 2016 **Termination Date**: June 1, 2017

Requirements: Must pass learning assessment with 100% and complete evaluation to receive CME/CPE credit. **Estimated completion time**: 30 minutes

Hardware/Software Requirements: OS that supports modern web browser; Browser: IE 11; Google Chrome version 4 or higher; Safari version 10.8 or higher

Contact Information: Sharp HealthCare CME at cme@sharp.com

Tuition: None **Commercial Support:** None

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ASSEMBLY BILL 1195: As an accredited provider, Sharp HealthCare is required to comply with California Assembly Bill 1195, which states that all CME activities must address cultural or linguistic competency. At a minimum, cultural competency is recommended to include:

- Applying linguistic skills to communicate effectively with the target population.
- Utilizing cultural information to establish therapeutic relationships.
- Eliciting and incorporating pertinent cultural data in diagnosis and treatment.
- Understanding and applying cultural and ethnic data to the process of clinical care.

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CME Portal is for Physicians **ONLY**

Nurses will be awarded credits via the Learning Center.

Pharmacist credit will be addressed by the CME Department.

Physicians– Use CME Portal

1. Complete the Test/Quiz
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3. CME Portal will generate a certificate for you – save for your records
4. CME credits will also be noted on your transcript

QUESTIONS?

Contact Heather Clemons, CME Department
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Leading Performance Excellence

Lean Six Sigma basics for every leader

White Belt

#1 Introduction

LSS awareness, roles and responsibilities

#2 LEAN Basics

How we eliminate waste in our work

#3 A3 Daily Problem Solving

Reporting tool for resolving daily issues / defects

#4 Team and Meeting Facilitation

How we collaborate and engage talent

Yellow Belt

#5 Change Management

Assuring acceptance and accountability

#6 Project Management

Managing time and resources for continuous improvement

#7,8,9 DMAIC

'Six Sigma' How we reduce variation and Defects

#10 LEAN Thinking and Intermediate A3 Skills

How we eliminate waste and create flow

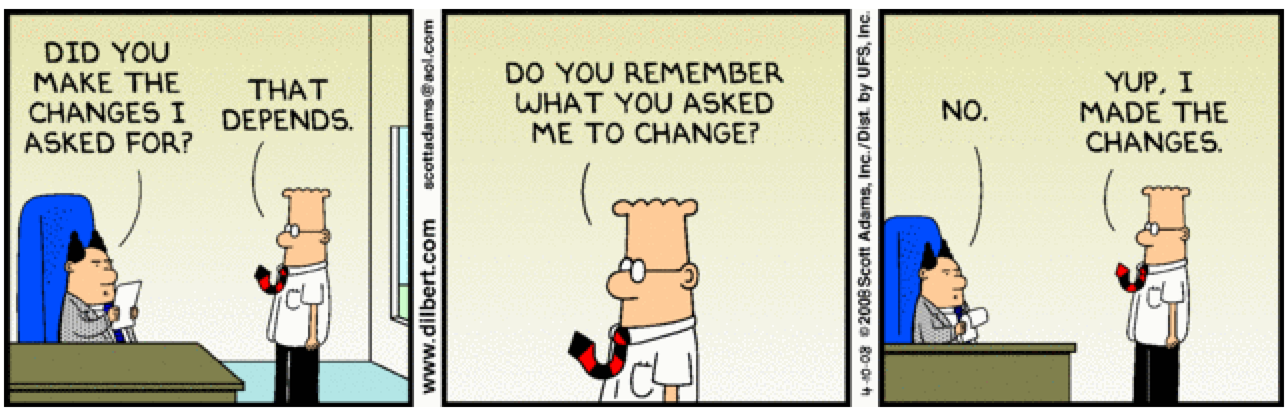
Yellow Belt Workshop

Hands on use of the tools and concepts

Leaders Improve Healthcare

Reflection:

Attention to how you manage your project not only will help reach success, it will help better manage resources.



Course Objectives

At the conclusion of this module, participants should be able to:

- Outline expectations for project management at Sharp
- Describe the role leadership plays in supporting and facilitating project work
- Explain the Project and Team Charter
- List several tools a Project Manager could use for planning and running a project

Have a plan

The tools and templates explained in this module will help you organize your efforts and provide your key stakeholders with the information they will need to support the efforts of the project.

Issues and opportunities are easier to identify with a written plan!

Project Leadership

It is important to identify and have agreement on ownership and responsibility for the project.

You need someone who will be “Leading Change”, per our change management model CAP. (Module 5)

Here is a list of project roles to consider:

- **Project Manager**: Organizer of the tools in this module.
- **Project Sponsor**: Person who can authorize expenses and changes.
- **Process Owner**: Person that will own and execute the improvements. Recipient of the project handoff.
- **Front Line Staff**: The individuals that will need to understand, contribute, follow and accept the improvement strategy.

Sponsor Responsibilities

An Executive Sponsor approves the project as a top organizational priority, dedicates resources, and holds the Process Owner accountable

- Remove barriers that will inhibit the team; Create an environment for success
- Structure accountability - Assure roles, responsibilities, and expectations are understood
- Recognize and celebrate incremental success
- Facilitate the expectation for sustainable improvements
- Attend reviews of Team progress with Project Manager or Team Leader
  - Receive updates; probing and listening; joint problem-solving
  - Reinforcing success; encouraging
  - Coaching for improved Team Leader performance
  - Committing to actions
- Accountable for implementation of Action Plan
- Plan for financial measures, both as a benchmark and a measure of success

Process Owner Responsibilities

A process owner is the person who has the authority to determine how a process operates and the responsibility to make sure it continues to meet customer and business needs today and into the future.

- Takes ownership of improvements identified through project, ensuring they are incorporated and maintained in the process
- Knows what is critical about the process
- Monitors process performance with data
- Makes sure the process identified is documented and that the documentation is used and updated regularly
- Makes sure the process management plan is in place
- Holds regular reviews
- Provides linkage to customers and other processes
- Makes sure that process operators have the training and resources to do their jobs well

Assemble your ARMI

In addition to your sponsor and process owner, you may need to work with extended group of stakeholders. Add to your plan the names of all the stakeholders and their role. This is called your ARMI:

Approver

Resource

Team Member and

Interested Party

Take your ARMI to the next level with a Stakeholder Analysis described in the CAP training: For detailed instructions Tool Kit Link HERE

ARMI

Name	A Approver	R Resource	M Team Member	I Interested Party
Jamie (COO)	x			
Jack (CE analyst)		x		
John (Nurse)			x	
Kari (CFO)				x
Sharron (Dir)	x		Core	
Dr. Ripple		x		x

- **Start ARMI with your sponsor and process owner while scoping**
- **Complete list before announcing a team**
- **This list will help determine who should be part of your communications**

Project Scoping

Identifying your stakeholders is the start of the scoping process. The objective of scoping a project is to set expectations and boundaries that will dictate the success of the project.

Scoping is much like “Define” in DMAIC, however information is still being assembled in order to seek project approval to proceed.

Use the “Project Charter” to assemble the scope of your project.

Sensing Sessions

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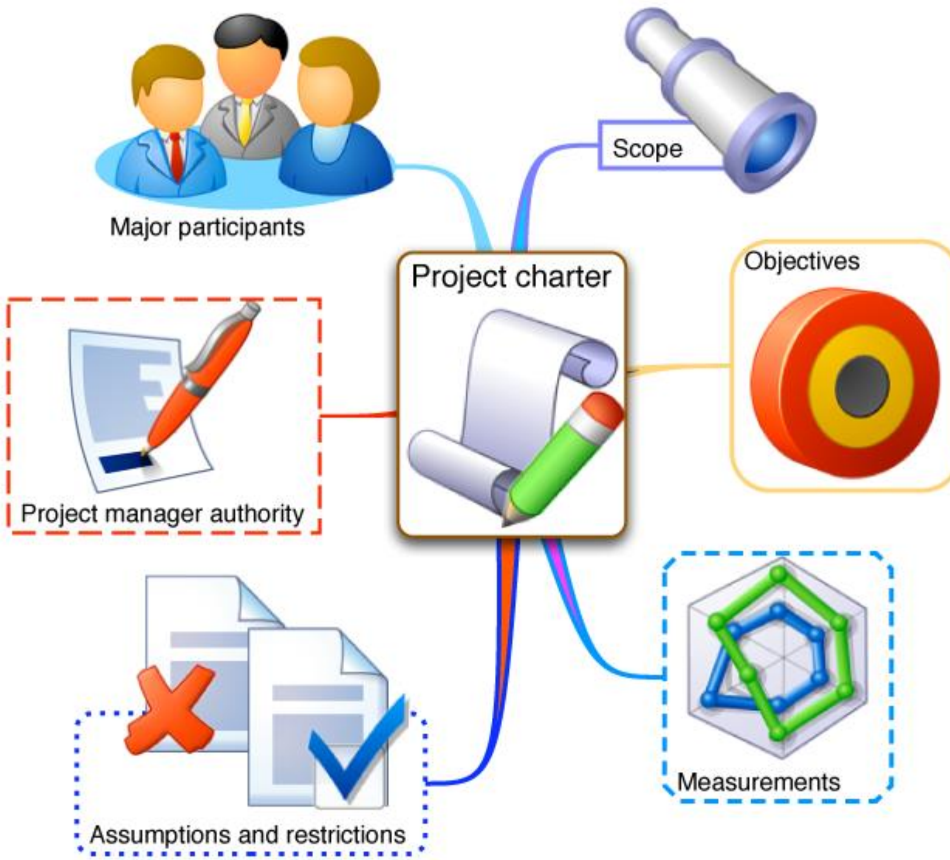
You need to get out and talk with your stakeholders, especially the front line staff, in order to really understand the current condition. This is called conducting Sensing Sessions.

- One-on-one or group sessions to get a sense of what people think about the problem and/or solution
- Questions to consider asking:
  - "What is working really well in your department?"
  - "What makes your job run smoothly?"
  - "What gets in the way of doing your job?"
  - "Where do you notice we waste time, money and resources?"
  - "Show me how …."

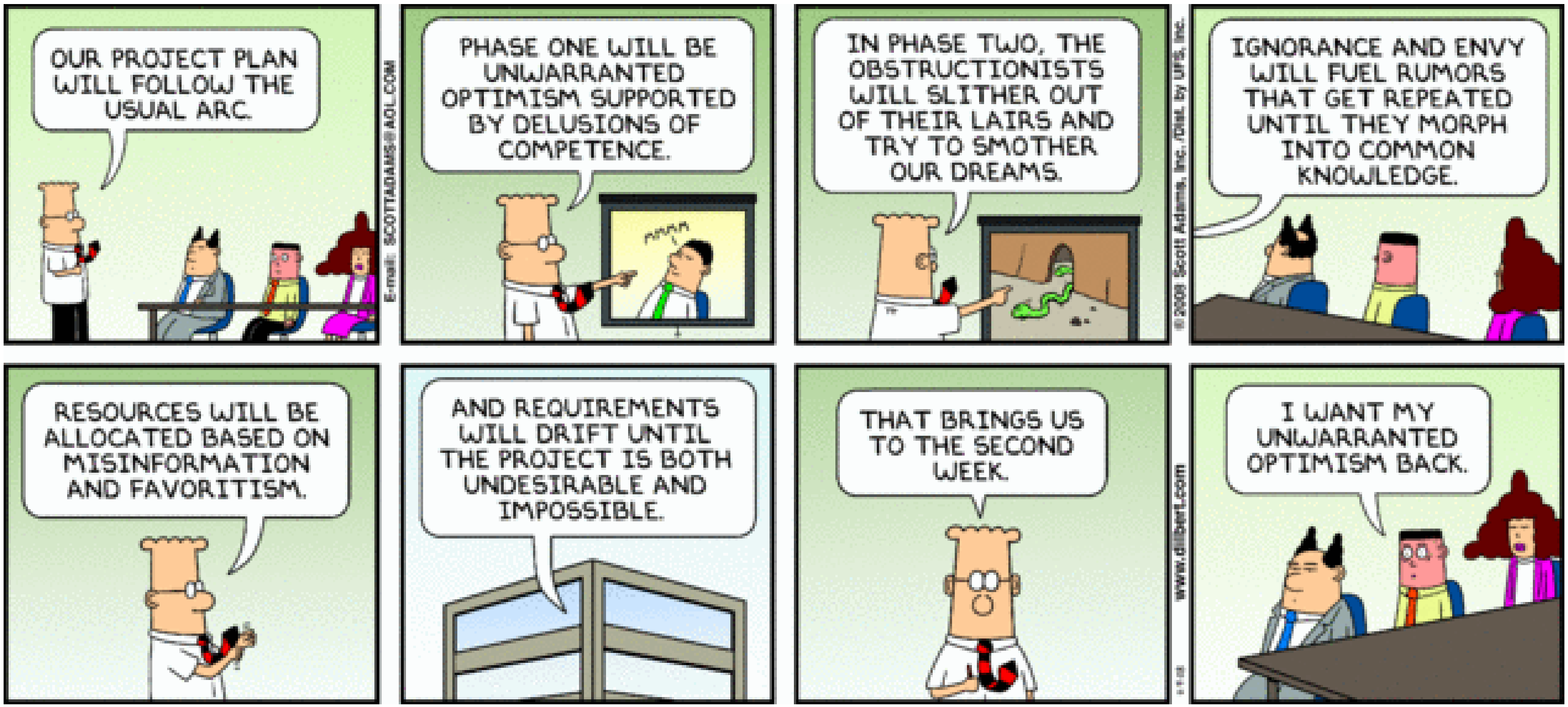
For detailed instructions Tool Kit Link HERE

Project Charter



Project Charter is a contract…

To help set you and your team up for success



Project Charter Template

- Contains key elements for a well-defined project
- PowerPoint / ready to share
- Instructions embedded in the template
- Process Owner and Sponsor sign off
- Corresponding Worksheet
- Includes a SIPOC

Project Charter Contents:

The following four slides are the template for the standard Project Charter at Sharp. Following the slides are detailed explanations to the content.

The second slide is for your SIPOC. This is a high level process map that includes identifying Suppliers, Inputs, Outputs and Customers.

For a copy of the Charter template along with slides for reporting your project, see the Tool Kit Link HERE

This tool will help you describe and understand the broader system your project will address. For further instruction on how to construct a SIPOC, view the instructional video at the Tool Kit Link HERE

Define Measure Analyze Improve Control

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Project Title *dates of duration*

Project description here. “What it is about” in only one or two sentences describe the project purpose. A Third sentence is okay as long as it is short. This is a spacer in case you need a third line too. State Location if not in title.

Goal Statement

Increase the percentage of or the number of from X to Y by a given Date. Try not to go to a third line.

Team

Sponsor: Name

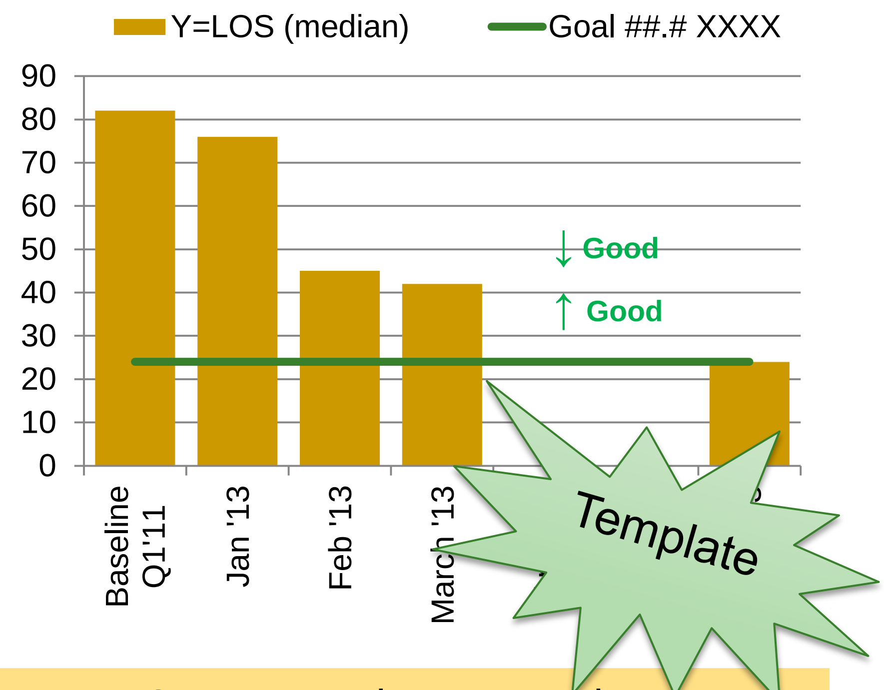
Process Owner: Name

(Pick one) Project Lead, Green, Black Belt: Name
Person One, Person Two, Person Three, Person Four, Person Five, Person Six, Person Seven, Person Eight, Person Nine, Person Ten. This list can keep going on until you run out of room. Perhaps list groups of resources.

Link to Strategic Goals

State the pillar that best reflect the main objective, strategic planning document or any type of linkage to overall organizational goals.

Measurement



Customer: The XYZ Patient

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Project Title *dates of duration*

In Scope	Out of Scope

Critical Success Factors	Boundaries / Non- Negotiables

Template

Lean Six Sigma

Project Title *mm/yy – mm/yy*

SIPOC				
Supplier	Process Inputs	Process	Process Output	Customer
		Starts when:		
		Complete when:		

Template

Lean Six Sigma

Project Title *mm/yy – mm/yy*

DEFINE	MEASURE	ANALYZE	IMPROVE	CONTROL
• Develop Charter (due date) • Process Map / SIPOC (due date) • Sensing / Observation (due date) • Capture VOC / CSFs (due date) • Form Team (due date)	• Identify Causal Factors (due date) • Develop Data Collection Plan (due date) • Develop Communication Plan (due date) • Execute Communication Plan (due date) • Execute Data Collection Plan (due date)	• Develop Statistical Analysis Plan (due date) • Perform Analysis (due date) • Identify Root Cause(s) (due date)	• Develop Future State (due date) • Identify / Prioritize Improvements (due date) • Develop Deployment Plan (due date) • Execute Deployment Plan (due date) • Measure Results (due date)	• Develop Process Control Plan (due date) • Execute Process Control Plan (due date) • Finalize Lessons Learned (due date) • Document Project Outcomes (due date) • Transition to Sponsor & Process Owner (due date)
DEFINE COMPLETE (due date)	*MEASURE COMPLETE (due date)*	*ANALYZE COMPLETE (due date)*	*IMPROVE COMPLETE (due date)*	*CONTROL COMPLETE (due date)*

Project Milestones:

Sponsor: Supports use of resources assures alignment with Sharp goals and will address barriers as needed for a successful effort.

Process Owner: Will take ownership for the process being changed, the implementation and longevity of the improvement plan and provide support for a successful effort.

Define
Process Owner:____________________

☐Charter ☐SIPOC ☐Customer Metrics ☐Team

☐Process Map ☐ Goal ☐ Approval to proceed

Sponsor: ____________________

Measure
Process Owner:____________________

☐Main Metric ☐ Baseline ☐Data Collection Plan ☐Key Inputs

☐ Approval to proceed

Sponsor: ____________________

Analyze
Process Owner:____________________

☐Gap identified ☐Root Cause ☐Graphical Analysis

☐Descriptive Analysis ☐ Approval to proceed

Sponsor: ____________________

Improve
Process Owner:____________________

☐Strategy ☐Test Solutions ☐Implementation Plan

☐Improve Analysis ☐ Communication Plan ☐ Approval to proceed

Sponsor: ____________________

Control
Process Owner:____________________

☐Documentation ☐ Control Analysis ☐Control Plan ☐Next steps

☐Spread ☐ Project Closure! ☐ Approval Close Project

Sponsor: ____________________

Template

Project Charter Details

Next we will review each element of the Project Charter.

The work to complete the charter will help you and your stakeholders to better understand the task at hand and to better manage the project.

- Project Description/ Problem Statement
- Goal Statement
- Project Resources
- Link to strategic goals
- Declare the customer
- Main Measure Graph and Goal
- SIPOC
- Scope
- Critical Success Factors
- Boundaries / Non-Negotiable
- DMAIC Milestones

Project Description

What is the project about?

- **In 1-2 sentences to describe the project purpose.**
- **Describe in terms of what is the defect or waste.**
- **Good to tie into the statement the location, situation and process where the defect is detected or occurs.**

Examples:

Focus: To reduce inpatient Heart Failure (HF) 30-day readmissions at Sharp Grossmont Hospital (SGH).

This project will increase the number of Sharp Coronado Long Term Care (LTC) non-medication related Quality Variance Reports (QVRs) containing the two essential elements of a complete follow up: follow up and actions.

Focus: To increase appropriate utilization of blood products based on clinical evidence.

Project Description Structure

We are experiencing a *problem* with:

The *area* where this problem is occurring is:

The problem has *existed* for at least:

The *magnitude* of the problem is:

and the *expected performance* is:

The *effect* this problem is having on our business is:

This is *costing* us a much as $___________ per__________.

Select the most meaningful attributes to include in your statement.

Goal Statement Format

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Increase the percentage of or the number of from X to Y by a given date.

- **Describe the gap or improvement range.**
- **Include the target date for achieving the goal.**
- **Review the statement being SMART**

  Specific, Measureable, Achievable, Results and Time Bound.

Examples:

Increase the percentile ranking of Overall Meals Satisfaction from 68th to 90th by Jan 2013.

Improve the percentage of blood transfusions meeting established guidelines from 23% to 50% by December, 2013.

Reduce the number of HF inpatient 30 day readmissions at SGH by 20% by June 30th, 2013.

Sponsor vs. Process Owner

Process Owner

- Will take or has <u>ownership</u> for the process being changed
- Will be in charge of implementation of the improvement plan
- Provides support for a successful effort
- Signs off and owns the Control Plan

Sponsor

- Supports use of resources and their availability
- Assures alignment with Sharp goals
- Will address barriers
- Holds Process Owner accountable for implementing improvements
- Helps resolve conflicts when working across silos

Team Structure

Core Team / Steering Team

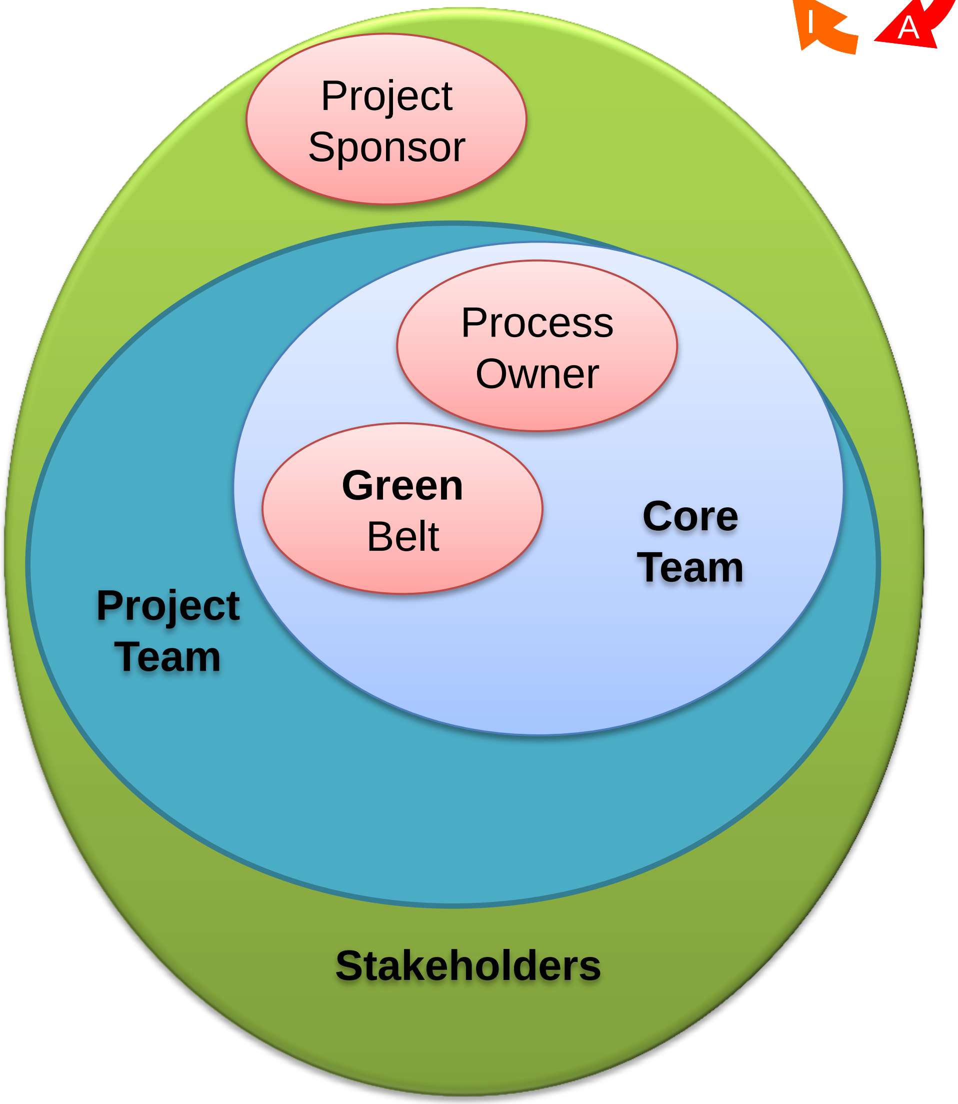
- Consider identifying a smaller team to lead the project (3-4 persons)
- Include the Process Owner and secondary owners
- Team will meet regularly to develop and monitor project strategy
- Meet with the Sponsor
- Share project responsibilities and work

Project Team

- Greater team that can represent a cross-section of the process
- Consistent members and as needed members of the A.R.M.I
- Pool of resources to be involved in brainstorming related tools
- Schedule meetings as needed to accomplish current objectives

Project Team Structure

- Project Sponsor
- Process Owner
- Green Belt
- Core Team
- Project Team
- Team Leader
- Team Members
- Stakeholders



Project Team

- The project team members should be from multiple disciplines as needed by the project and include both clinical and business representatives.

- Make sure it is clear that the team members are representatives of the larger stakeholder group and are willing to:
  - Send a representative if not able to attend meetings.
  - Take on action items developed by the team.
  - Act as a liaison between the project team and functional areas!

Link to Strategic Goals

State the Sharp pillar that best reflects the main objective, strategic planning document or any type of linkage to overall organizational goals.

This statement is best derived by having a discussion with your Sponsor and Process Owner to describe the significance and linkage to strategic goals for the department, service line, entity or system.

Examples:

<u>Urgent Care Project</u>

Service Pillar: Increase patient satisfaction - Medical Group: Achieve overall medical group patient satisfaction score equal to or greater than the 90th percentile on the Press Ganey medical group patient satisfaction survey.

<u>Blood Culture Before Antibiotics</u>

Quality Pillar: Improve core measures being incorporated into Value-Based Purchasing. Improve the Clinical Process of Care Measures (Core Measures).

Customer

Listed above graph on charter first page

External: The Patient

- Primary choice when project outcome is seen by the patient as valuable
- Add a descriptor if patient type is specific
  ‘Cardiac Out Patient’, ‘Discharged Patients’, ‘Patients requiring blood’

Internal Customers:

Example: HR’s customer can be a hiring manager.

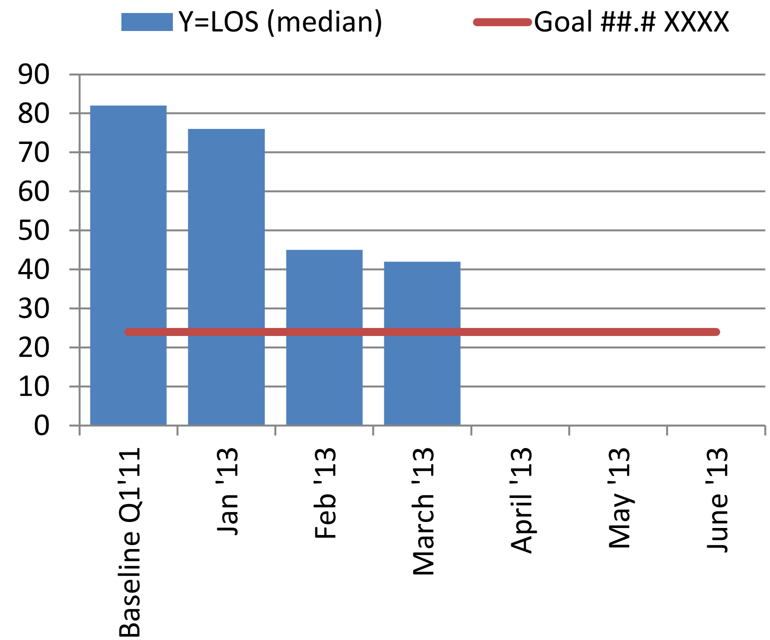
- Use only when the recipient of your process output is internal to the organization.
- Customer can be the next process step outside the project scope.
- Avoid listing the process owner or manager as the customer.
  - Customer: Finance Department
    - Appropriate: Incorrect or incomplete registration causes defects in the billing process.
    - Inappropriate: Finance needs to cut costs related to fixing billing defects.

Charter Graph

Use only the standardized format

- Easier for audience grasp key elements:
  Baseline, Goal and Current measure / progress
- Present your one key measure

	A	B	C
1		Y=LOS (median)	Goal ##.# XXXX
2	Baseline Q1'	82	24.00
3	Jan '13	76	24.00
4	Feb '13	45	24.00
5	March '13	42	24.00
6	April '13		24.00
7	May '13		24.00
8	June '13		24.00
9			
10	To resize chart data range,		
11	drag lower right corner of range.		
12			



Scope Versus Boundaries

Are you getting ready to solve world hunger or a very specific issue for certain patient types and conditions that can be solved in a reasonable amount of time?

A well-scoped project can mean the difference between endless frustration and attainable incremental improvement.

Work with the Process Owner and Sponsor to identify exactly what elements of the broken process will be in and out of scope of the project. Boundaries and non-negotiable items refer to what can be added, deleted, resources or expenses related to the project outcome.

Scope Example

In Scope

IPE Patients
All payer types
ICD-9 Code 316
Transfers
Any time of day
All elective surgeries

Out of Scope

Rehab Patients
Behavioral Patients
Pediatrics
OPE Patients
Deceased
Women's Center

Boundary/ Non Negotiable

No Additional FTEs
No added overtime
No additional work for Nurses
No significant changes to Cerner
No new software
Executive approval

Avoid 'Scope Creep' (i.e. solving world hunger) or the project will linger on and die a slow death. Keep this tool handy for the duration of the project.

The three C's of controlling scope creep

1. Clarify business requirements: One of the most critical ways to prevent scope creep is to clarify the project scope and requirements with stakeholders from the very onset.

2. Collaborate on and communicate the Project Plan: Once business requirements have been fleshed out and clarified between you and all other stakeholders, you need to plan how the project will be executed.

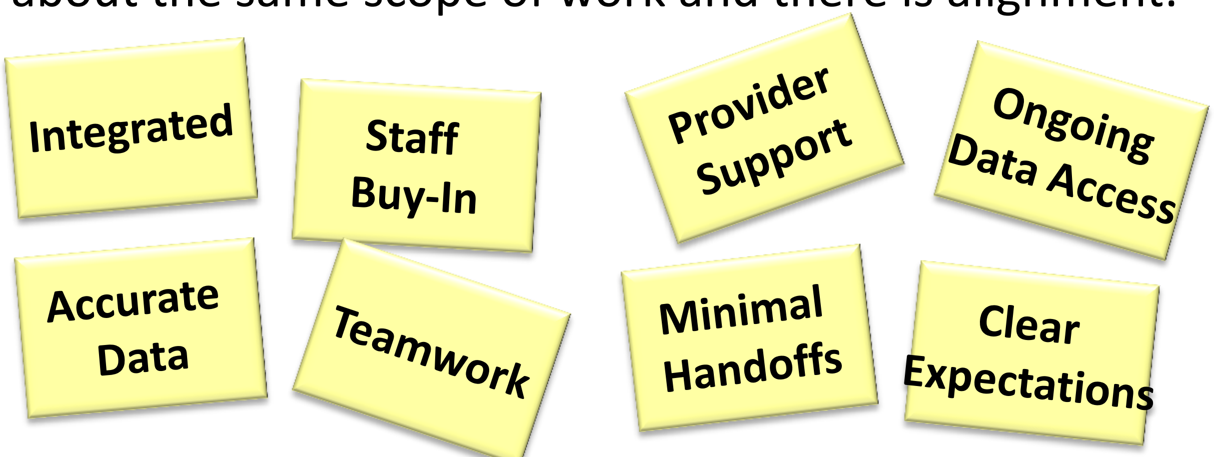
3. Control change: Accept that change is an inevitable part of all projects and plan for it. An effective Change Control process helps you to stay in control of your project.

Critical Success Factors

Brain storm the Must Do and the Must Haves to be successful:

- With the Sponsor when scoping the project.
- At the team kick off-meeting.
- When implementing an improvement strategy.

This is an alignment tool to generate and sort Critical Success Factors or Major Milestones/Indicators of progress if this project is to succeed. If they can reach general agreement on these, chances are the entire team is talking about the same scope of work and there is alignment.



For detailed instructions:
Tool Kit Link HERE

Risk Management

Although Risk Identification and Management is not included on the Project Charter, this is a good exercise to prioritize issues that may impact a successful project.

Brainstorm risks and evaluate the likelihood and impact on the project. Then develop a strategy to manage issues that could derail your efforts.

Risk Identification and Management

	Likelihood of Occurring Scale (1-10)	**Impact if Occurs** Scale (1-10)	**Total** * Likelihood x Impact
Risk 1			
Risk 2			
Risk 3			
Risk 4			

* Develop a strategy to address problems >50

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Team Charter

Instead of a project team, a Task Force or Steering Team may be formed. For the longevity and productivity of the team, create a Team Charter.

Elements to include:

Vision: What successful results will look like

Purpose: What function is the team to provide

Scope and Priorities

Organizational Reporting and Accountability

Membership, Roles, Responsibilities and Support

Decision Making Method

Meeting times

Consider including your Ground Rules and other facilitation tools explained in the Team and Meeting Facilitation Module 4.

Project Planning

The following five tools will help you plan your project, monitor the plan and resources keeping to the plan.

Time Line or Gantt Chart: "When"

Thought Map: "What"

ARMI: "Who"

Communications: Awareness of When, What and Who

Elevator Speech: Method for delivering the message.

Failing to plan is planning to fail.

Alan Lakein

Gantt Chart

A Gantt chart is a graphical way of showing a timeline.

- Shows expected start and stop times
- Simultaneous steps and steps dependent upon the completion of another
- Visual explanation of the project's duration
- May include outside events that may impact the project.

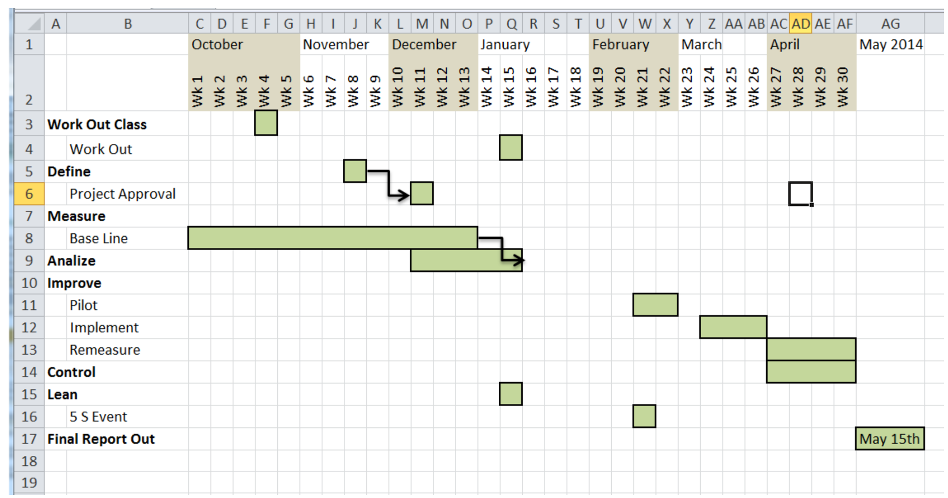
<u>Tips:</u>

Show major milestones

Start from the end and work your way backward.

Brainstorm using a Thought Map first

For detailed instructions:
Tool Kit Link
[HERE]

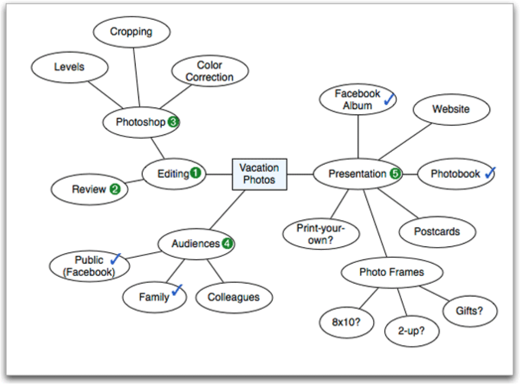


Thought Map

Trying to figure out where to start? What to do next? Consider making a Thought Map by yourself or with a small team.

On a wall chart, write the issue at hand in the center, or to one side and the goal on the opposite side. Proceed with brainstorming all the different avenues and opportunities that will lead you to your goal. Later, take the results and create a plan (steps to take or incorporate into a Gantt chart).

For further instruction on creating a Thought Map, see Instructional video Link [HERE]



Communications

An extremely important part of any plan!

What good is a plan if nobody knows about it?

Three Phases of Communication Strategy

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Prepare your stakeholders according to the stage of your project. Do you just need Awareness, Understanding or is it time for Ownership? Target your communications accordingly.

✓Kick-off
✓Project Org Structures
✓Charters & Responsibilities
✓Proof of Concept
✓Workflow Design Planning

Awareness

✓Communication
✓Design with SMEs, MDs, Nurses, Therapies, Staff
✓Meetings
✓Demos

Understanding

Go Live

✓Workflow Orientation
✓Division Demos
✓Training & Job Aids
✓New Metrics
✓Go Live Plans

Ownership

Month 1	Month 2	Month 3	Month 4	Month X	Month X_2

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Elevator Speech
aka One Minute Message

If you are writing an email, creating a poster or meet a project stakeholder in the elevator, the following message format is a concise way to get your project's message across.

Create an elevator speech with your team to help bring everyone onto the same page and delivering a consistent message.

A simple 4-part formula for your elevator speech:

1. **"What our project is about . . . ."**
2. **"Why it is important to do . . . ."**
3. **"What success will look like . . . ."**
4. **"What we need from you . . . ."**

For detailed instructions: Tool Kit Link [HERE]

Elevator Speech – Discharge Project example

- Our project is about improving bed availability by making the discharge process more efficient.
- It is important because sometimes it can take over 4 hours to discharge a patient, while other patients are waiting for a bed. This leads to decreased patient, staff and physician satisfaction.
- When successful, the discharge process will be organized, predictable, timely and safe.
- What we need from you is your support and openness to new ideas.

Use all the tools?

How large and critical the project is will determine what tools to use and when.

Practice using all the tools in order to understand what tools to use and when.

The effort to plan out your project up front will pay off in the long run.

Documenting and sharing your work will give your efforts the visibility and credibility it deserves.

Next Steps:

- Complete the Module 6 Quiz.
- Complete a 'One Minute Message' regarding any Process Improvement effort you or your department is involved in.

For Yellow Belt certification: Complete your 'One Minute Message' and record on your certification worksheet. Discuss with your leader the use of the tool.

Certification Worksheet Link HERE