Peer Mentor Role – *Reflections on Experiences as Peer Mentors*

- What worked?
- What didn't?

Peer Mentor Role – Key Principle

Listen

Peer Mentor Role – Summary

- Help guide Change Leader and Executive Sponsor
- Provide support for PI process
- Provide support about how to find change ideas
- Share stories about your experience with PI
- "Cheerleading" - Provide encouragement and hope
- Help Provider maintain momentum
- Other?

Provider Project Set-up – Checklist for Peer Mentors

1. Go on Walk-through and review results

2. Review Project Charter

3. Confirm that Change Leader is appropriate and has time to devote to PI

4. Confirm that Change Team has been established

5. Executive Sponsor is involved and has signed-off on Project Charter

Provider Project Set-up – Checklist for Peer Mentors

1. Go on walk-through with Provider
2. Review walk-through results –
    two salient findings

Provider Project Set-up – Checklist for Peer Mentors

2. Review Project Charter (1st page of Change Project Form)

- Aim statement

- Define measure and how data will be collected

- Baseline data

- Business case

What do we mean by the "Business Case"?

- Improving the financial bottom line, i.e. increasing revenue or decreasing expenses, or increasing the positive difference between the two.

- There is almost always a direct connection between these financial measures and:

    – Efficiency and productivity

    – Relationship with referral sources and payers

    – Staff retention

What do we mean by the "Business Case"?

- What is the justification for the time and effort invested in PI?

- Without a business case, changes are often not sustained.

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The Business Case – Financial Bottom Line

- Decreasing time to treatment may increase admissions

- Increasing admissions may increase revenue

- Balancing the mix of admissions from different contracts may increase revenue

- Reducing no-shows may increase billable services

- Increasing continuation in treatment may increase billable services

- Others??

The Business Case – Efficiency and Productivity

- Reducing waste and rework in duplication of or excessive paperwork may free up staff time
- Reducing no-shows may improve staff utilization of time
- Assigning non-clinical tasks performed by clinicians to non-clinical staff may increase billable clinical hours
- Others??

The Business Case – Relationships with Referral Sources and Payers

- Developing ongoing relationships with referral sources may increase admissions

- Improving access and retention may result in a competitive edge that results in more referrals and ability to attract contracts

- Others??

The Business Case – Staff Retention

- Staff members who are contributing to improving the organization may be more likely to stay

- Improved staff retention means less retraining and disruption to clients

- Others??

Summary: What do we mean by the "Business Case"?

- Improving the financial bottom line, i.e. increasing revenue or decreasing expenses, or increasing the positive difference between the two.

- There is almost always a direct connection between these financial measures and:
  - Efficiency and productivity
  - Relationship with referral sources and payers
  - Staff retention

Provider Project Set-up – Checklist for Peer Mentors

3. Confirm that Change Leader is influential, experienced and knowledgeable, and has freed up enough time to devote to PI

Provider Project Set-up – Checklist for Peer Mentors

4. Confirm that Change Team has been established

- No more than 7 people

- If Change Leader is not clinical person, make sure to include clinician on team

- Make sure to include someone who represents customer's perspective

- Plan frequency of team meetings, e.g. 1.5 hrs. every other week

Provider Project Set-up – Checklist for Peer Mentors

5. Executive Sponsor is involved

- Has thought about how to integrate PI with Strategic Plan and QI

- Is committed to support PI efforts

- Is committed to sustain changes that result in improvement

- Has signed-off on Project Charter

Review Sample
Change Project Form

- What questions would you ask the Change Leader?

- See Checklist for ideas

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PI Toolkit for Providers – Mentors offer, as needed

- Flowcharting

- Nominal Group Process

- How to measure change
  - ➢ Next available appointment tracking/ graphing forms
  - ➢ No-show tracking/graphing forms

- NIATx website - Promising Practices

PI Toolkit – Flowcharting

GOLDEN RULE: Focus on fixing system, not individuals (no blame)

- Step 1   Define objective (e.g. see all clients within 24 hours of 1st contact, increase retention from 1st contact to admission)
- Step 2   Define process (e.g. admission process)
- Step 3   Define first and last steps
- Step 4   *Quiet Time* – Each person writes down current process steps (from customer's perspective)
- Step 5   As a group, note steps in process on yellow Post-its
- Step 6   Review flowchart

PI Toolkit – Flowcharting

- Step 7   *Quiet Time* – Each person uses red Post-its to identify and record bottlenecks/drop out points and blue Post-its to describe suggestions for process improvements

- Step 8   Place blue and red Post-its on flowchart

- Step 9   Review suggested changes

- Step 10   *Quiet time* – Prioritize areas to focus on. Each participant picks three changes, based on ease of implementation and impact on objective. Use colored dots to mark on flowchart.

- Step 11   Select changes to pilot test

- Step 12   Discuss next steps

Nominal Group Process
to brainstorm and assign priorities

STEP 1: Preparation

STEP 2: Silent idea generation

STEP 3: Round-robin recording of ideas

STEP 4: Serial discussion of ideas

STEP 5: Preliminary voting

STEP 6: Discussion of preliminary voting

STEP 7: Final voting

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www.niatx.net

- Promising Practices
- NIATx Workbook
- Instructions for Flowcharting
- Instructions for Nominal Group Technique

Coaching Styles and Concepts

1. When to listen, when to tell

   – When in doubt, listen

   – Respect organizational lines of authority and roles

Coaching Styles and Concepts

2. What to look for and listen for

- What kind of organization are you working with?

  - Take the idea and run - *Utopia*

  - Take the idea and run in the wrong direction – *Ask questions to make sure you understand why*

  - Tell me what to do – *Avoid this seduction/ dependence; find someone in the organization who can provide direction around improvement projects*

Coaching Styles and Concepts

3. When to add structure, when not to

– Feel the rhythm; watch what happens when they run a few cycles

- Great ideas, but trouble executing them – *help develop a plan*

- Great at implementation, but not at generating ideas – *teach them idea generation techniques, e.g. Nominal Group Technique; direct them to the NIATx website*

Each one of our projects is locally initiated and involves full community partnership. Our primary goal is to empower the local people by having them fully engaged in every aspect of a project.

Greg Mortenson, author of <u>Three Cups of Tea: One Man's Mission to Promote Peace… One School at a Time</u>

What to watch for – Common Pitfalls

1. Too much, too quick

2. Not holding people accountable

3. Multiple changes made simultaneously

4. Improvements aren't affecting bottom line

5. Waiting for aim measure results to see if there's improvement

6. "No authority/control" to change cause of problem

7. Resistant staff

Performance Management Reporting

- Review sample report
- What questions would you ask the Change Leader?

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Tracking intermediate data

- Next available appointment
- No-shows
- Other?

- If possible, track data by week or month, rather than "before" and "after" change

Peer Mentor Activities

Site Visits

- 1st site visit – Walk-through (Oct.)

- 2nd site visit – Attend Change Team Meeting

- Site visit with Coach (April/May)

- See sample Site Visit agendas

Peer Mentor Activities

Ongoing

- Phone calls to review progress and address challenges – weekly or biweekly, soon after Change Team Meeting

- Review Change Project Form - monthly

- Review Project Profile – 2/year

- Review Provider Performance Measure Data - monthly

- Review PI Checklist - quarterly

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Support for Peer Mentors

- Participate in monthly Peer Mentor conference calls (opportunity to collaborate with other Peer Mentors and Coach)
- Call or email PI Coach Elizabeth, as needed
  - 425.558.1026
  - elizabeth@blarg.net

Peer Mentor Role – Summary

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- Provide support for PI process
- Provide support about how to find change ideas
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- "Cheerleading" - Provide encouragement and hope
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Questions?
Concerns?

Have fun!

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