

IOWA STAR-SI PEER MENTOR TRAINING
Detailed Agenda
Sept. 28, 2007

Objectives:

- To prepare Peer Mentors to support STAR-SI provider sites
- Clarify expectations
- Review PI tools

9:30 Welcome and Introductions - **DeAnn**
Feedback about Learning Session

9:40 Peer Mentor Role

- [Interactive Exercise: Reflections on Experiences with Peer Mentors - What worked? What didn't?](#) - **Gena**
- Key Principles – LISTEN using MI principles; Teach the process; provide the solution only when it is clear that direction is needed; Provider is decision-maker – **Cathy**
Handout: Mark Dodd MI Handout
- Summary - **Elizabeth**
 1. Help guide Change Leader and Executive Sponsor
 2. Provide support for PI process
 3. Provide support about how to find change ideas
 4. Share stories about your experience with PI
 5. “Cheerleading” - Provide encouragement and hope
 6. Help Provider maintain momentum
 7. Other?

10:40 Provider Project Set-up – **Elizabeth**

- Do Walk-through with Executive Sponsor and Change Leader
Handout: Walk-through Instructions and Response Sheet
- Review Walk-through results – 2 salient findings
- Confirm that project charter has been created (first page of Change Project Form), including:
 - > Aim statement
 - > Define measure and how data will be collected
 - > Baseline data
 - > Business case
- Confirm that Change Leader is influential, experienced and knowledgeable, and has time to devote to Process Improvement
- Confirm that Change Team has been established
 - > No more than 7 people
 - > If Change Leader is not a 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 hour every other week
- Confirm that Executive Sponsor has been involved and has signed off on project charter
- [Interactive Exercise – Review a sample completed Change Project Form; What questions would you ask the Change Leader?](#)
Handouts: Sample Change Project Form, Checklist for Review of Change Project Form

11:00 *Break*

- 11:10 Provider Project Set-up (continued)
- 11:30 PI Toolkit for Providers
- Flowcharting (demonstration with group) – **Cathy** (25 min.)
 - Nominal group process – **Kevin** (20 min.)
- 12:30 *WORKING LUNCH*
- 1:00 PI Toolkit for Providers (continued)
- NIATx website (live) – **Heidi** and others
 - Interactive Exercise: Participants will show what they've found to be most useful, e.g.**
 - NIATx Workbook
 - Promising Practices
 - Nominal Group Technique instructions
 - Flowcharting instructions
- 1:30 Coaching Styles and Concepts - **Elizabeth**
- When to listen, when to tell
 - What to look for and listen for
 - When to add structure, when not to
 - What to watch for – Potential problem areas
 - Interactive Exercise: Group discussion of common pitfalls**
 - > Too much, too quick
 - > Not holding people accountable
 - > Multiple changes made simultaneously
 - > Improvements aren't affecting bottom line
 - > Waiting for aim measure results to see if there's improvement
 - > "No authority/control" to change cause of problem
 - > Resistant staff
- 2:15 Performance Management Reporting - **Elizabeth**
- Interactive Exercise: Review sample data; What questions would you ask the Change Leader?**
- Refer to Handout from Thurs. LS: Sample NIATx OP Report
- Intermediate measures
 - > Next available appointment tracking/graphing forms
 - > No-show tracking/graphing forms
 Handouts: Sample Next Available appointment Tracking form, Sample No-show Tracking form
 - Track data by week or month, not just before and after change
- 2:45 *Break*
- 2:55 Activities and Support
- New approach to Aims (at request of year 1 providers) – **Gena**
 - Reduce wait time
 - from 1st request to Assessment/ Screening (Nov.-Jan.)
 - from Assessment/Screening to 1st Treatment Session (Feb.-Mar.)
 - Increase retention
 - from 1st request to Assessment/ Screening (Apr.-June)
 - from Assessment/Screening to 1st Treatment Session (July-Sept.)
- (Exceptions allowed, to focus on what keeps the CEO awake at night)
- For example focus on other aims:
- Increase continuation from admission to 4th treatment session
 - Increase admissions
 - Other, e.g. Increase fee collections

- Peer Mentor Activities - **Elizabeth**
 - > Site visits
 - 1st site visit – Walk-through (Oct.)
 - 2nd site visit – Change Team Meeting
 - Review Sample Site Visit Agendas
 Handouts: Sample Site Visit Agendas
 Interactive Exercise: [What would you change?](#)
 - Site visit with Coach (April/May)
 - > 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
 Handout: PI Checklist
- Support for Peer Mentors: Coach Elizabeth is resource to Peer Mentors – **Elizabeth**
 - Participate in monthly Peer Mentor conference calls (opportunity to collaborate with other Peer Mentors and Coach)
 - Call or email, as needed
- [Interactive Exercise: Concerns? Questions?](#)

3:25 Timeline and Next Steps - **Gena**

- Provider/Peer Mentor Assignments
- Call provider to arrange walk-through
- Prepare [Peer Mentor Quarterly Report](#)

Handouts: Peer Mentor Quarterly Report, PI Checklist

3:40 Review of the day - **Gena**

- Feedback – What should we do differently in next Peer Mentor Training? What should we do the same?

3:45 **ADJOURN**

IOWA STAR-SI PEER MENTOR TRAINING HANDOUTS

Handouts in Binder (to be presented in this order during Training Session)

- Brief Agenda
- Ppt presentation
- Mark Dodd MI handout
- Walk-through Instructions and Response Sheet
- Sample Change Project Form
- Change Project Form Instructions
- Checklist for Review of Change Project Form
- Project Profile
- Flowchart Instructions (OPTIONAL as handout – they can check website)
<http://chess.chsra.wisc.edu/NIATx/PDF/PIToolbox/Flowcharting.pdf>
- Nominal Group Process Instructions (OPTIONAL as handout - they can check website)
<http://chess.chsra.wisc.edu/NIATx/Content/ContentPage.aspx?NID=33>
- Promising Practices (OPTIONAL as handout – they can check website)
<http://chess.chsra.wisc.edu/NIATx/Content/ContentPage.aspx?NID=100>
- Sample Next available appointment tracking form
- Sample No-show tracking form
- Site Visit Agendas
- STAR-SI Timeline/Milestones ?
- Peer Mentor Quarterly Report
- PI Checklist
- Feedback form (from DeAnn) (or do verbally)

Other materials:

- ¾" sticky dots
- flip chart
- post-it notes – yellow, red, blue
- tape

Send electronically:

- Change Project Form
- Project Profile
- Peer Mentor Quarterly Report
- PI Checklist
- Next Available Appointment Tracking (doc and xls)
- No-show Tracking (doc and xls)
- Site Visit Agendas
- Walk-through Instructions and Response Sheet