

## Sample Peer Mentor Walk-through Site Visit #1 Agenda

Objective: To familiarize peer mentor with agency and connect with Executive Sponsor and Change leader to enhance ongoing mentor/provider relationship

- Meet with Executive Sponsor and Change Leader to discuss plan for walk-through
- Do Walk-through with Executive Sponsor and/or Change Leader
- Review planned data collection/Performance Management System, especially for capturing 1<sup>st</sup> request date (30 min.)
- Tour agency (30 min.)
- Debrief with Executive Sponsor and Change Leader and discuss what's next (30 min.)
  - Schedule phone calls, e.g. weekly or biweekly initially, soon after Change Team Meeting
  - Questions/Concerns about roles, e.g. Has Change Leader cleared enough time to focus on PI?
  - Discuss your role with Executive Sponsor and Change Leader – their expectations and yours
  - Show [www.niatx.net](http://www.niatx.net)

## Sample Peer Mentor Site Visit #2 Agenda

(Allow approximately 3 hours)

Objective: To familiarize peer mentor with Change Team and support Change Leader

- Meet with Executive Sponsor and Change Leader (30 min.)
  - Plan for the day
  - How does PI fit into agency's QI system and strategic plan?
  - Review baseline data
  - Review Project Charter, with a detailed focus on making sure that:
    - > The aim is clear and measurable
    - > The measure to support the aim is relevant and obtainable
  
- Attend Change Team meeting (2 hours)
  - Introductions
  
  - Story about impact of PI on Peer Mentor's agency (including an example of what was learned from what didn't work)
  
  - Review PI 101; present Intro to PI ppt to all staff and/or Change Team, if desired
  
  - Review Walk-through discoveries
  
  - Review Project Charter
  
  - Support Change Leader in use of appropriate tools, e.g.
    - > Airplane Exercise or Mastermind to illustrate PDSA cycles
    - > Nominal Group Technique to brainstorm change ideas and assign priorities
    - > Group Flowchart
  
- Debrief with Executive Sponsor and Change Leader and discuss what's next (15 min.)