WELCOME!

Presented by: Sara del Campo de Gonzalez, M.D.

Recorded: Wednesday, October 20, 2021
11AM – 1PM CT
Sara del Campo de Gonzalez, MD, FAAP, is a general pediatrician and former medical director at the Young Children’s Health Center, a community-based clinic of the University of New Mexico. As former director of the Advocacy Program in Pediatrics for UNM, she had the opportunity to educate all pediatricians-in-training that graduate from the UNM Pediatrics Residency program in advocacy and community engagement. Her special interests are in trauma-informed care, excessive childhood stress activation, resilience and protective factors, early childhood development and immigration. As of February 2021, she now resides in San Antonio, Texas, where she serves the Harvard Center on the Developing Child in providing expert consultation, connections and thought partnership in support of the Center’s strategic planning.
Addressing Social Health and Early childhood Wellness
Implementation and Change at the Practice Level: “Engaging Leadership to Support Practice Transformation”
October 29, 2021 – October 29, 2023

Attendees: Prior to the start of the activity, please review the below information to ensure successful participation in this enduring material

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Purpose of Course
This webinar will explore how to identify any organizational levels and members of leadership that need to support the practice change, identify where in your practice flow you can propose the practice change and where it should be implemented, develop a Practice Change Proposal, develop an initial presentation to leadership, and develop ongoing communication strategies.

Learning Objectives
After completing this course, you should be able to:

- Identify strategies for determining organizational level and leadership team to approach for support, as well as where in the structure or practice flow the change needs to be made.
- Outline components of a practice change proposal to present to leadership, including steps for preparation of practice environment and comprehensive implementation plan.
- Outline a communication plan with leadership, including progress updates on goals, as well as sustainability needs.
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<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Relevant Financial Relationship (Please indicate Yes or No)</th>
<th>Name of Commercial Interest(s)*</th>
<th>Disclosure of Off-Label (Unapproved)/Investigational Uses of Products</th>
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<tbody>
<tr>
<td>Sara del Campo de Gonzalez, MD</td>
<td>Faculty and Planner</td>
<td>No</td>
<td>NONE</td>
<td>Do not intend to discuss</td>
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<tr>
<td>Eileen Reilly</td>
<td>Planning Group</td>
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<td>Jamie Ciccone</td>
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<tr>
<td>Abby St. George</td>
<td>Staff</td>
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<tr>
<td>Hilary Haftel, MD, MHPE, FAAP</td>
<td>COI Reviewer and Resolver</td>
<td>NO</td>
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<td>Do not intend to discuss</td>
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**List of Principal Faculty and Credentials**
Andrew Garner, MD, PhD, FAAP  
Nerissa Bauer, MD, MPH

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Learning Objectives

1) Identify strategies for determining organizational level and leadership team to approach for support, as well as where in the structure or practice flow the change needs to be made.

2) Outline components of a practice change proposal to present to leadership, including steps for preparation of practice environment and comprehensive implementation plan.

3) Outline a plan for keeping leadership updated regarding progress on practice change goals, as well as sustainability needs.
A few key principles:

• Pick the right leader to approach!
• Come prepared.
• Build a relationship → Communicate
• What appeals to the leader?
  • The Organization: Think mission, values, standards.
  • Numbers? Think funding/costs, sustainability, impact, outputs/outcomes.
  • Best practice? Think recommendations, guidelines, impact of interventions.
  • Program visibility? Think publications, presentations, recruitment, marketing.
Identify strategies for determining organizational level and leadership team to approach for support, as well as where in the structure or practice flow the change needs to be made.

Objective 1
Determine any organizational levels and members of leadership that need to support the change.

Key Questions to Consider:

Which steps in your practice change will require a change in organizational infrastructure or leadership support?

Can you identify at which level of organization/infrastructure the change would need to be made?

Who are the members of leadership to approach for support?

For example, a change to EHR will require x, y, and z at a higher level than our practice...

Institution-wide?
Department-wide?
Practice-wide?

Medical Director?
Department Chair?
Hospital administrators?
Where in your practice flow will you propose the practice change should be implemented?

Workflow Mapping
(aka Value Stream Mapping)

Common methodology used in many industries to examine processes.

Workflow mapping helps you “see” your processes in a way that helps give you a better idea of the experiences of families, staff, providers, and community practices as they engage with your practice.

Once visualized in this way, practices can begin to develop solutions into your processes.
Workflow Mapping
(aka Value Stream Mapping)

Examining the current state, designing the ideal state:

• It is a graphical representation of the steps in any given process--and in a clinical setting can depict the flow of patients, services, or information.

• This detailed look at how activities are carried out helps to eliminate waste, improve efficiency, and ensure value in every step along the way.

• This strategy can also help teams identify areas in the “flow” where challenges can be addressed, and opportunities for innovation can be discovered.
Workflow Mapping
(aka Value Stream Mapping)

Example: Value Stream Map of WCC
Workflow Mapping
(aka Value Stream Mapping)

✓ Encourages continuous improvement
✓ Empowers stakeholders to give ideas about small changes to the flow that can be tested in rapid form (QI, PDSA!)
Outline components of a Practice Change Proposal to present to leadership.

Objective 2
Develop Practice Change Proposal

Project Planning Tool

Project Proposal Summary
Develop Practice Change Proposal

Project Planning Tool

Project Proposal Summary
Practice Change Proposal: Project Planning Tool

- The Prep:
  - preparation of practice environment
  - analysis of current state (Value Stream Map, aka Workflow Map)
  - Community Asset Mapping

- The Plan:
  - project vision, goals, timeline, assessment/evaluation, sustainability plans

- Engagement:
  - plan for communication/input/feedback with all stakeholders
Practice Change Proposal: Project Planning Tool

- The Prep:
  - preparation of practice environment
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  - plan for communication/input/feedback with all stakeholders
Preparation of Practice Environment

Innovative and Agile

Change-Ready

Risk-tolerant
Preparation of Practice Environment

- Establish a learning and growth culture among staff.
- Review the practice’s mission, vision, and value statements with practice staff, and modify as needed.
- Evaluate and assess the practice environment.
- Identify what needs to be changed.
- Identify members of a staff team, including a team leader, that will plan and lead the change process.
- Communicate and implement the change.
- Manage resistance.
- Regularly solicit feedback from staff, and patients/families.
- Honestly evaluate change, celebrate successes and acknowledge failure.
Practice Change Proposal: Project Planning Tool

- The Prep:
  - preparation of practice environment
  - analysis of current state (Value Stream Map, aka Workflow Map)
  - Community Asset Mapping
- The Plan:
  - Project vision, goals, timeline, assessment/evaluation, sustainability plans
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Workflow Mapping
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Example: Value Stream Map of WCC
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  - plan for communication/input/feedback with all stakeholders
What is a Community Asset Map?

- Provides information about the strengths and resources of a community.
- Goal is to inform and uncover solutions.
- Includes:
  - Capacities and abilities of the community members, patients, families.
  - Physical structures, places.
  - Business, social agencies, associations, nonprofit organizations, etc.
- Format is variable:
  - Database or list
  - Diagram
  - Community map with “pins”

Where to start...

1) Define community boundaries
2) Identify and involve partners
3) Determine what type of assets to include
4) List the assets of groups
5) List the assets of individuals
6) Organize assets on a “map”

Visual Diagram depicting resources for a specific question:

“What resources are available for my two-year-old patient who is in need of a high-quality child care center, but will also likely need speech therapy services and a Developmental Pediatrician to evaluate them further?”

Many of the maps that are created to address a specific issue are “dynamic” in that the resources change, perhaps as agencies lose or gain funding, change eligibility criteria, undergo changes in management, and so on.
Geographic Map of the Community Served:

A general approach where assets, and often challenges, are “pinned” on a map and labeled.

A balance of assets and “deficits” are labeled, because some challenges can be seen as assets, depending on the lens. Plus, this helps us get a bigger picture of the community’s experience.
Asset Map: The resources in our Clinic ecosystem related to Child Development
Practice Change Proposal: Project Planning Tool

- The Prep:
  - preparation of practice environment
  - analysis of current state (Value Stream Map, aka Workflow Map)
  - Community Asset Mapping

- The Plan:
  - project vision, goals, timeline, assessment/evaluation, sustainability plans

- Engagement:
  - plan for communication/input/feedback with all stakeholders
Practice Change Proposal: Project Planning Tool

- The Plan:
  - The Vision Statement, Goals, Objectives
  - Timeline
  - Team Leads/Champions
  - Assessment and evaluation
  - Stakeholder engagement
  - Sustainability, Budget
# Practice Change Proposal: Project Planning Tool

**Mission Statement:** To provide holistic, coordinated, compassionate care to children and families in their own community.

<table>
<thead>
<tr>
<th>Goals</th>
<th>Description</th>
<th>Work Plan</th>
<th>Timeline/Date due</th>
<th>Project Lead</th>
<th>Comments</th>
<th>Next Steps</th>
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<tbody>
<tr>
<td>Develop project goals and objectives</td>
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<td>Develop Timeline</td>
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<td>Goal 1:</td>
<td>Detailed item for Goal 1</td>
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<td>Goal 2:</td>
<td>Detailed item for Goal 2</td>
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<tr>
<td>Develop assessment and evaluation plan</td>
<td>project metric 1</td>
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<td>project metric 2</td>
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<td>project metric 3</td>
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<td>project metric 4</td>
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<tr>
<td>Staff/provider feedback plan</td>
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<tr>
<td>Community partner feedback</td>
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<tr>
<td>Family/patient feedback</td>
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<tr>
<td>Perform exploration of funding streams</td>
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<tr>
<td>Submit grant proposal for funding</td>
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<tr>
<td>Plan for</td>
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</tbody>
</table>

**Table Notes:**
- Vision, Goals, Objectives
- Planning Table
- Master Timeline
- Budget, Finances, etc.
Practice Change Proposal: Project Planning Tool

- The Prep:
  - preparation of practice environment
  - analysis of current state (Value Stream Map, aka Workflow Map)
  - Community Asset Mapping
- The Plan:
  - project vision, goals, timeline, assessment/evaluation, sustainability plans
- Engagement:
  - plan for communication/input/feedback with all stakeholders
Practice Change Proposal: Project Planning Tool

Engagement:

- plan for communication, input and feedback with all stakeholders:
  - Community/families
  - staff
  - providers
  - partner agencies
Develop Practice Change Proposal

Project Planning Tool

Project Proposal Summary
One-Page, “The Ask”:

- Highlight the issue.
- High level overview of project planning tool.
- Appeal to priorities of leadership team.
- Propose solution with contributions from Community Asset Map and Workflow Map.

The Organization: Think mission, values, standards.

Numbers? Think funding/costs, sustainability, impact, outputs/outcomes.

Best practice? Think recommendations, guidelines, impact of interventions.

Program visibility? Think publications, presentations, recruitment, marketing.
Solicit input and modifications to proposal from core practice change team.

Include a discussion where team anticipates possible requests for clarification, resistance, noncommitment.
Outline a plan for keeping leadership updated regarding progress on practice change goals, as well as sustainability needs

Objective 3
Initial Presentation to Leadership

Present Practice Change Proposal:
• One-page Summary
• Refer to Planning Tool
The Ask:

- Highlight the issue.
- High level overview of project planning tool.
- Appeal to priorities of leadership team.
- Propose solution with contributions from Community Asset Map and Workflow Map.
- Consider presenting anticipated challenges and how team might address...

The Organization: Think mission, values, standards.

Numbers? Think funding/costs, sustainability, impact, outputs/outcomes.

Best practice? Think recommendations, guidelines, impact of interventions.

Program visibility? Think publications, presentations, recruitment, marketing.
Ongoing communication strategies

Leadership progress updates:

- Schedule regular updates.

- “Communicating Your Progress” worksheet: Adapt the project planning tool/project proposal summary to depict goals, progress, as well as to communicate ongoing needs and sustainability goals.
Leadership progress updates:

<table>
<thead>
<tr>
<th>Statement of Vision, Key Aims, Major Goals and/or Objectives:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Our Team Highlights:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Consider a short narrative summary. Here you might report a high-level progress update that will be detailed below, for example &quot;Our project is officially up and running! Screening has initiated...&quot; or perhaps, &quot;We had an incredible session with our family advisory group this quarter, where we gained significant insights about the issues that are priorities to them&quot;).</td>
</tr>
</tbody>
</table>

| Challenges, concerns, questions: "Our team was met with a significant challenge this quarter due to a sudden staffing shortage, but we developed an innovative strategy to address the issue, which I'll review below..." |

<table>
<thead>
<tr>
<th>Progress on Key Objectives</th>
<th>GOAL: Optimize the practice environment for change and innovation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team reviewed and completed the list of steps toward preparing our clinic culture for change</td>
<td>Staff will complete post-training survey to assess whether culture change is in progress.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Preparation</th>
<th>GOAL: Workflow map</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed a workflow map, now with the involvement of our family advisor group as well as a separate map with the nursing staff.</td>
<td>Team will present to All Staff Meeting to brainstorm where screening tool might be implemented in round two of our POSA cycle.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GOAL: Community Asset map</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical students worked together with community partners to put together a first draft of a community asset map around social determinants of health.</td>
</tr>
</tbody>
</table>
Leadership Buy-In: Harvard Business Review

Issue-Selling Prompts

These questions will help you use the seven tactics effectively:

**Tailor your pitch**
Where does my audience stand on this issue?
What does my audience find most convincing or compelling?

**Frame the issue**
How can I connect my issue to organizational priorities?
How can I best describe its benefits?
How can I link it to other issues receiving attention?
How can I highlight an opportunity for the organization?

**Manage emotions on both sides**
How can I use my emotions to generate positive rather than negative responses?
How can I manage my audience’s emotional responses?

Leadership Buy-In: Harvard Business Review

Get the timing right
What is the best moment to be heard? Can I “catch the wave” of a trend, for example, or tap into what’s going on in the outside world?

What is the right time in the decision-making process to raise my issue?

Involve others
Which allies from my network can help me sell my issue, and how can I involve them effectively?

Who are my potential blockers, and how can I persuade them to support me?

Who are my fence-sitters, and how can I convince them that my issue matters?

Adhere to norms
Should I use a formal, public approach to sell my issue (for example, a presentation to upper management)? Or an informal, private approach (casual one-on-one conversations)? Or a combination of the two?

Suggest solutions
Am I suggesting a viable solution?

If not, am I proposing a way to discover one instead of just highlighting the problem?
Practice Level Implementation Tools:

• Organizational Change (Worksheet)
• Practice Change Proposal:
  o Community Asset Mapping (Guide with examples)
  o Workflow Mapping (Guide with examples)
  o Project Planning Tool (Worksheet)
  o Project Proposal Summary (Worksheet)
• Communicating Your Progress (Worksheet)
Learning Objectives

1) Identify strategies for determining organizational level and leadership team to approach for support, as well as where in the structure or practice flow the change needs to be made.

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