



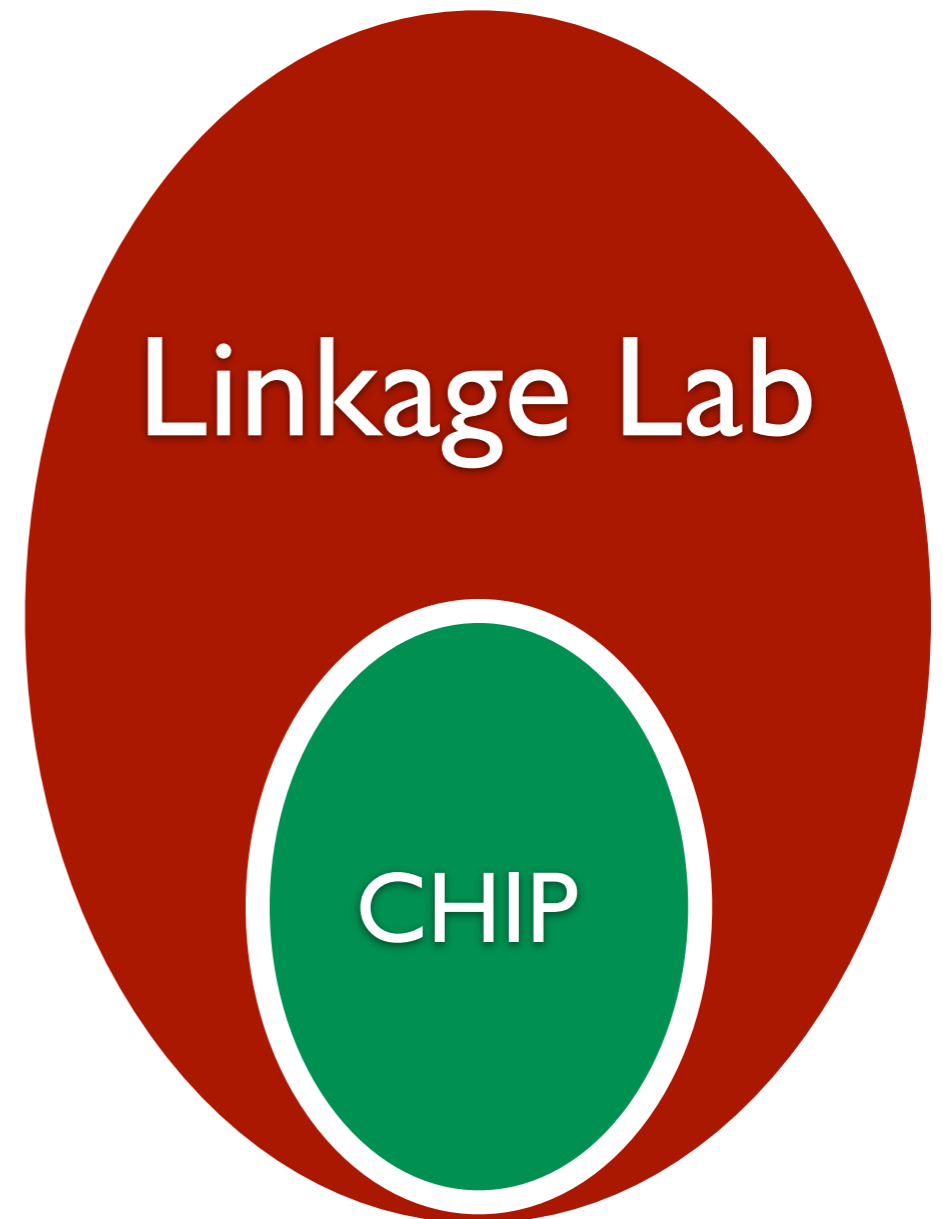
Project Management

Dr. Victor Tabbush



AGENDA

- What is the CHIP?
- Framework for Project Management
- Conceiving of your own CHIP

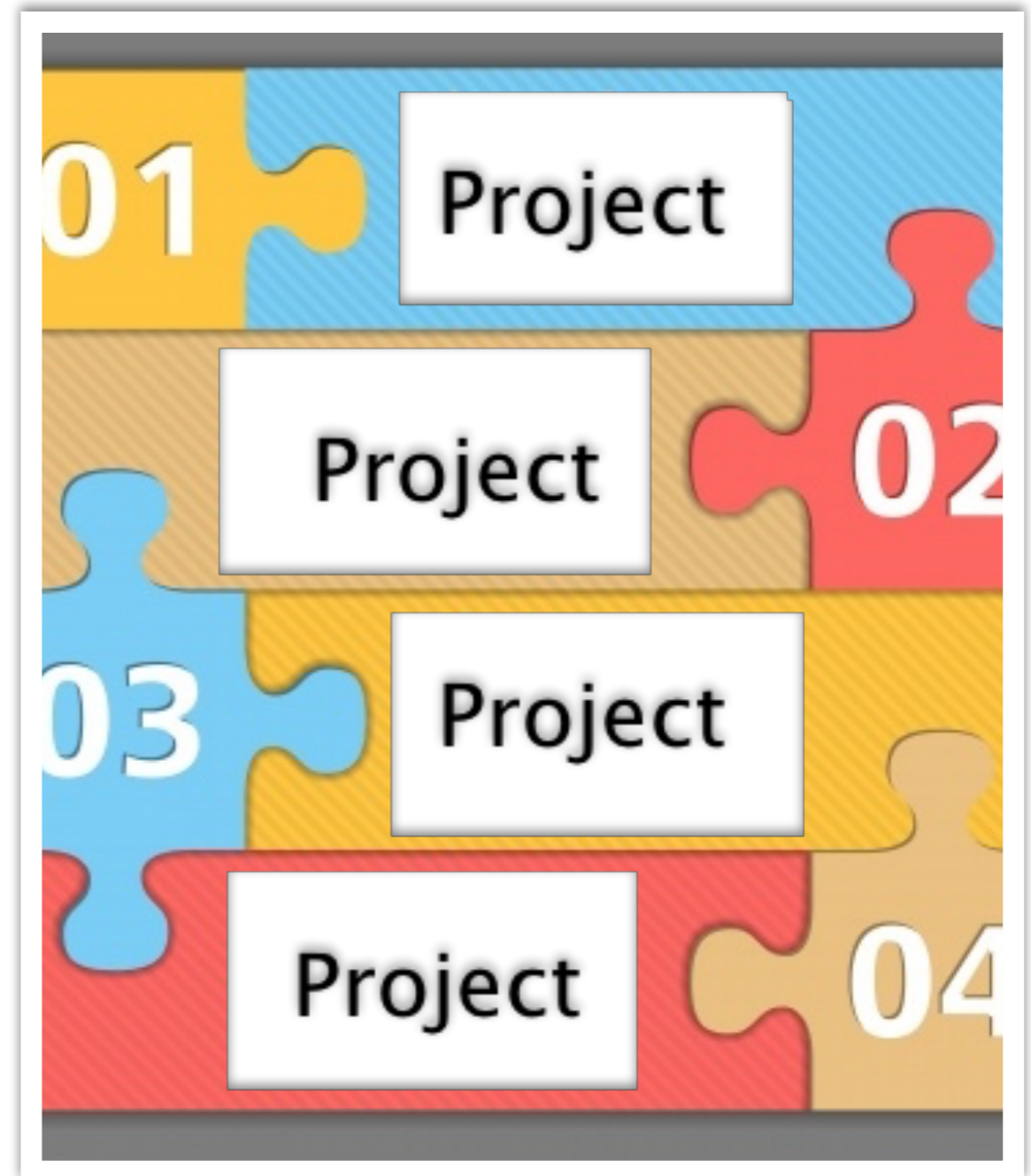


(PARTNER) CHIP - COMMUNITY HEALTH INTEGRATION PROJECT

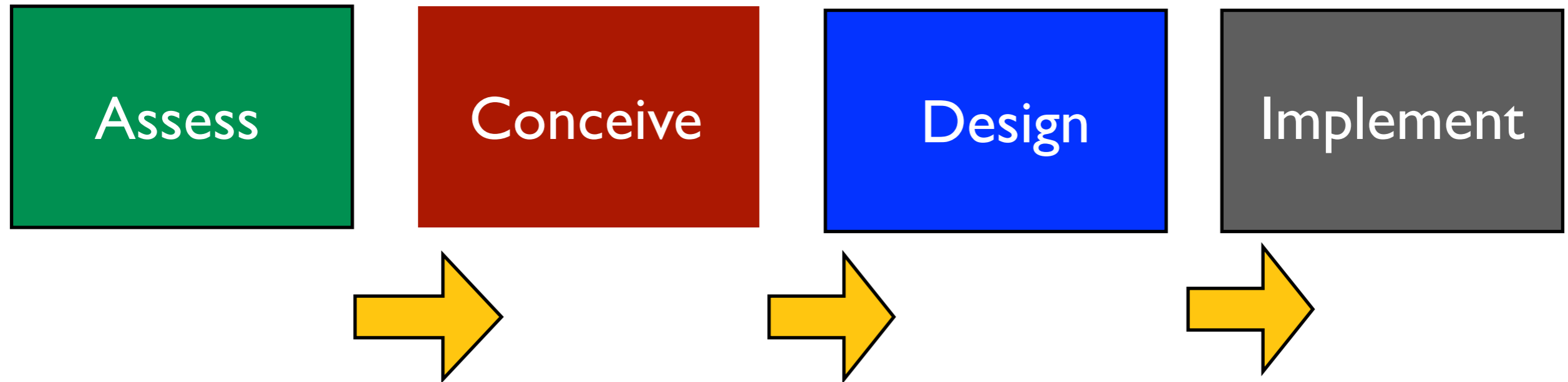
- Your project for the Linkage Lab.
- To conceive, design and implement a plan to foster integration of your services with the health sector.

THE CHIP: COLLECTION OF COMPONENT PROJECTS

The CHIP is a bundle of individual projects that must be conceived, designed, and implemented to complete the CHIP.



THE FOUR PHASES OF THE CHIP

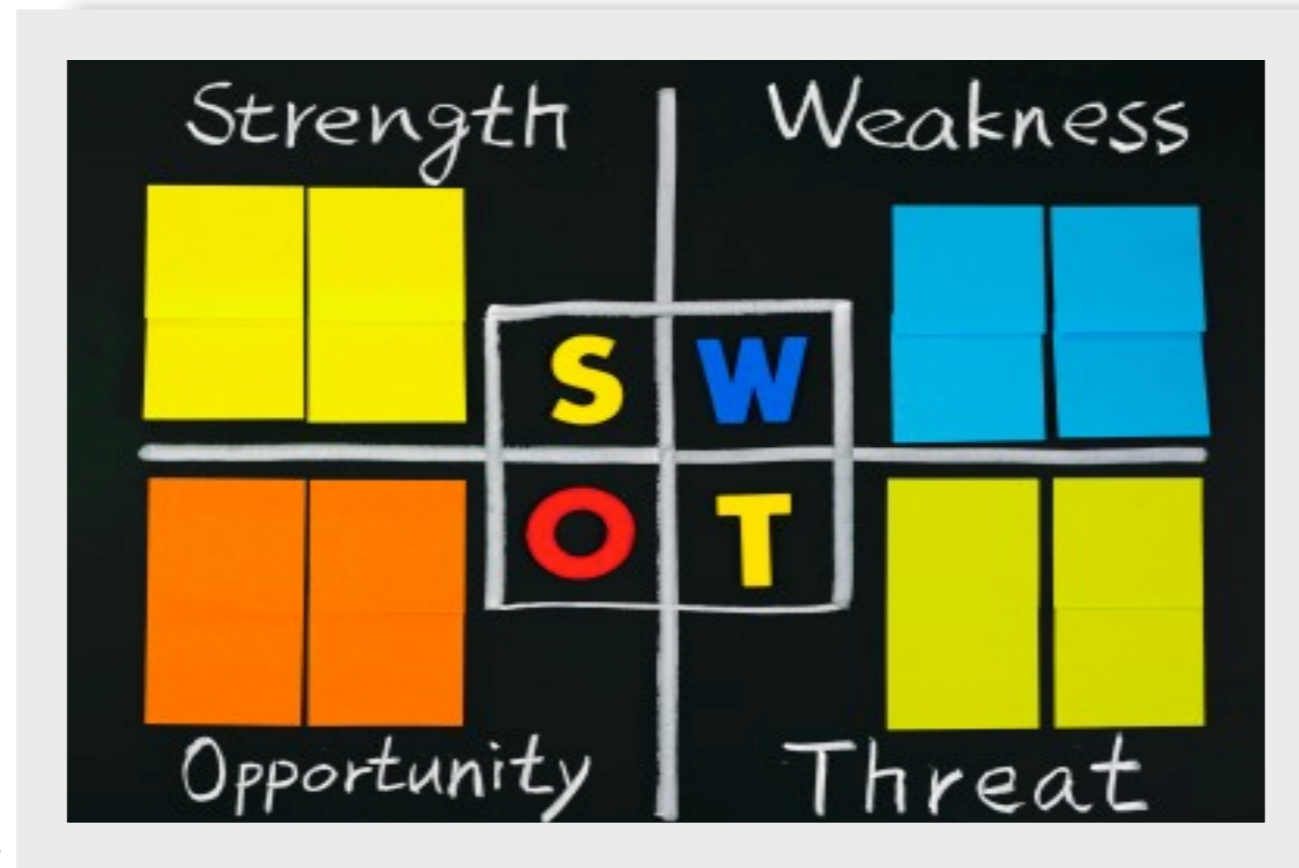


- Formative evaluation takes place during the Conception phase.
- Process evaluation is done during the Implementation phase.
- Summative evaluation is done at the end of the Implementation phase.

ASSESSMENT PHASE: FIVE STEPS

- (1) Assess the external environment for opportunities and threats
- (2) Establish the CHIP Goal and Objectives
- (3) Examine and refine your mission statement as appropriate
- (4) Assess internal strengths and weaknesses
- (5) Identify the causes of the weaknesses

FIRST STEP: EXTERNAL ASSESSMENT



What opportunities do policy changes and payment reform present?

What threats are you facing that might imply new business models?

SECOND STEP: GOAL STATEMENT



Identify organizational goal of your participation in the Linkage Lab - the key result, stated broadly and qualitatively.

SAMPLE CHIP GOAL STATEMENTS

- To establish a profitable relationship with the medical sector to deliver LTSS
- To be the provider of choice for our local hospitals in conducting care transitions
- To become a partner in an ACO
- To have our LTSS integrated into the medical sector
- To generate a revenue stream from the commercial offering of LTSS to health plans
- To partner with health plans in the design of individual care plans for duels
- To partner with health plans in the delivery of services that are part of individual care plans for duels

GOALS MUST BE MADE “SMART”



Objectives are converted Goals

MEANING OF “SMART”

- **Specific** - Means that the general Goal is recast in a way that affixes to it a specific value or magnitude.
- **Measurable** – Means that a metric or measure is stated that allows a determination of whether the Goal is achieved or not.
- **Achievable** - Means that the Goal, while ambitious, is capable of being achieved. If the Goal is unattainable, you and others might shrink from the challenge.
- **Relevant** – Means the that Objective is directly related to the program Goal.
- **Time dated or bound** – Means that a time frame is established for the attainment of the Goal is stated.

EXAMPLES OF GOAL CONVERSIONS

- **Goal:** To establish a profitable relationship with the medical sector to deliver LTSS.
- **Objective:** Ten percent of our total revenues will emanate from commercial contracts to provide LTSS and these contracts will deliver a 5% profit margin by the end of 2017.
- **Goal:** To be the provider of choice for our local hospitals for care transitions.
- **Objective:** We will be the exclusive provider of at least 24 care transitions for three selected conditions for at least one local hospital by the end of 2017.
- **Goal:** To become a partner in an ACO.
- **Objective:** We will have begun delivering LTSS services to at least 100 clients as part of an ACO MOU by the end of 2017.

Exercise

Converting Goals into Objectives

Goal	Objective
To provide food support and security to our clients upon discharge from the hospital	
To reduce emergency events stemming from drug interaction effects for our poly-pharmacy clients	
To increase awareness of caregivers on ways to detect depression of their clients	

Possible Answers

Goal

- To provide food support and security to our clients upon discharge from the hospital
- To reduce emergency events stemming from drug interaction effects for our poly-pharmacy clients
- To increase awareness of caregivers on ways to detect depression of their clients

Outcome Objective

- A program will be in place by June 30 2016 whereby the nutritional needs will be assessed for 100% of clients within two days of discharge, and meals on wheels delivered to all those in need for a period of ten days.
- Medication reconciliation will be performed for 100% of our poly-pharmacy clients within 24 hours of discharge so that by the end of September 2016 the ED utilization rate stemming from medication errors will fall by 15%.
- By the end of the training program, 85% of those attending the training will be able to correctly state five depression indicators.

DO NOT CONFUSE OUTPUTS WITH OUTCOMES

- **Outputs:** The immediate results of an action, activity or process that document that the action, activity or process has been completed.
- **Outcomes:** Changes that occur that the achievement of the ultimate goal of the project. Outcomes logically result from outputs.



DIFFERENCES BETWEEN PROCESS & OUTCOME MEASURES

Process Measures (Outputs)	Outcome Measures
How are you doing?	How did you do?
What key actions have you undertaken?	What results have you achieved?
Are those actions indicative of success?	Are those results meaningful?

EXAMPLES OF OUTPUT (PROCESS) VERSUS OUTCOME MEASURES

Goal	Output Measures	Outcome Measure
To establish a profitable relationship with the medical sector to deliver LTSS.	A signed MOU.	Revenues and net income achieved from commercial contracts to provide LTSS.
To be the provider of choice for our local hospitals in conducting care transitions.	Contractual terms with a hospital to provide care transitions agreed upon.	Extent of care transitions provided for local hospitals.
To become a partner in an ACO.	Invitation to negotiate terms with a ACO to deliver selected services.	Initiation of the delivery of LTSS services within an ACO context.



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External Assessment, Goal and Objectives

Sections 1, 2 and 3

ASSESSMENT PHASE: FIVE STEPS

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- (4) Assess internal strengths and weaknesses
- (5) Identify the causes of the weaknesses

EXAMINE AND MODIFY MISSION STATEMENT



STATEMENT

“To be the primary care provider of choice through the offer of clinically excellent and sensitive care”

“To serve the needs of the San Felipe community by being culturally competent”

“To deliver care, treatment and prevention services in disease management for the underserved residents of our community.”

MISSION STATEMENTS SHOULD CONTAIN THREE PARTS

What



For
Whom

Does Yours?

How

Example

- The mission of our organization is to provide integrated outpatient mental health care to the patient population in Los Angeles County by collaborating with primary care clinicians, focusing on the disease processes which most affect the patient's ability to function in activities of daily living and to self-manage his/her health issues.

Second Example

- The mission of the ambulatory services division of our Community Health Center is to optimize the health and well being of the residents of San Mateo County through the delivery of high quality ambulatory care in a culturally competent and cost-effective manner.

IS YOUR MISSION STATEMENT RELEVANT & CURRENT?



In light of your intention to enter into commercial partnerships with the medical sector, does your statement need updating?

Boulder County Area Agency on Aging

- Our mission is to promote the health and well-being of older adults by building on individual, family, and community strengths.

Denver Regional Council of Governments

The Denver Regional Council of Governments is a planning organization where local governments collaborate to establish guidelines, set policy and allocate funding in the areas of:

- Transportation and Personal Mobility
- Growth and Development
- Aging and Disability Resources

Easter Seals

- Easter Seals Colorado's (ESC) mission is to partner with individuals and families to reduce the impact of disability or health challenges to enhance quality of life.

Lutheran Family Services Rocky Mountains

- Inspired by the compassion of Christ, Lutheran Family Services walks with the vulnerable through services that heal, strengthen and provide hope.

Seniors Resource Center

- The SRC is a community partner providing person-focused, coordinated services to enhance independence, dignity, and quality of life.

Southwest Center for Independence

- To support independent living by and for people with disabilities, and to facilitate change within the community for the inclusion of all people.

The Independence Center

- Working with people with disabilities, their families and the community, we create independence so that all may thrive.

Visiting Nurse Corporation of Colorado

- Visiting Nurse Association is committed to a continuum of health care in the home and community supporting optimal well-being, independence, and dignity.



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Mission

Section 4

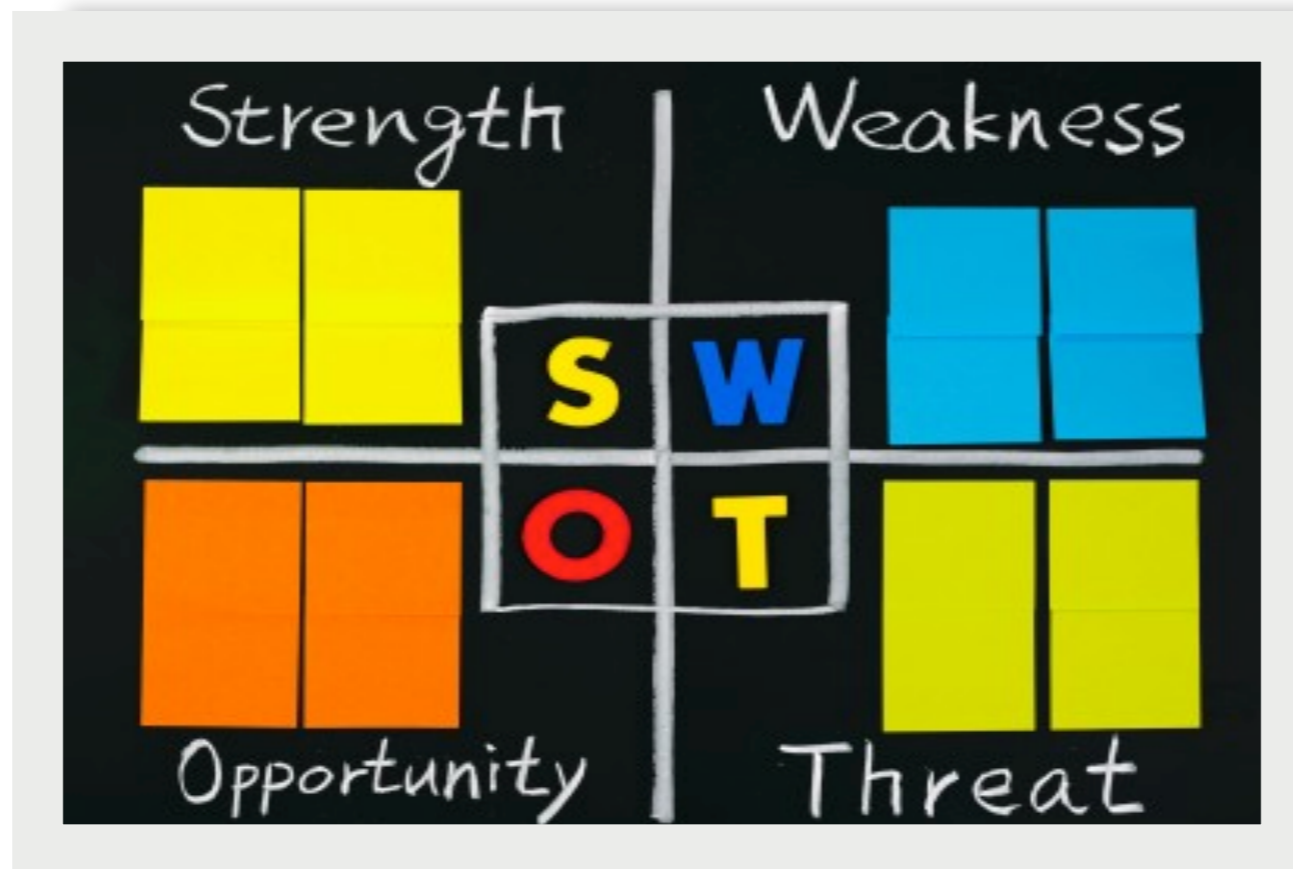
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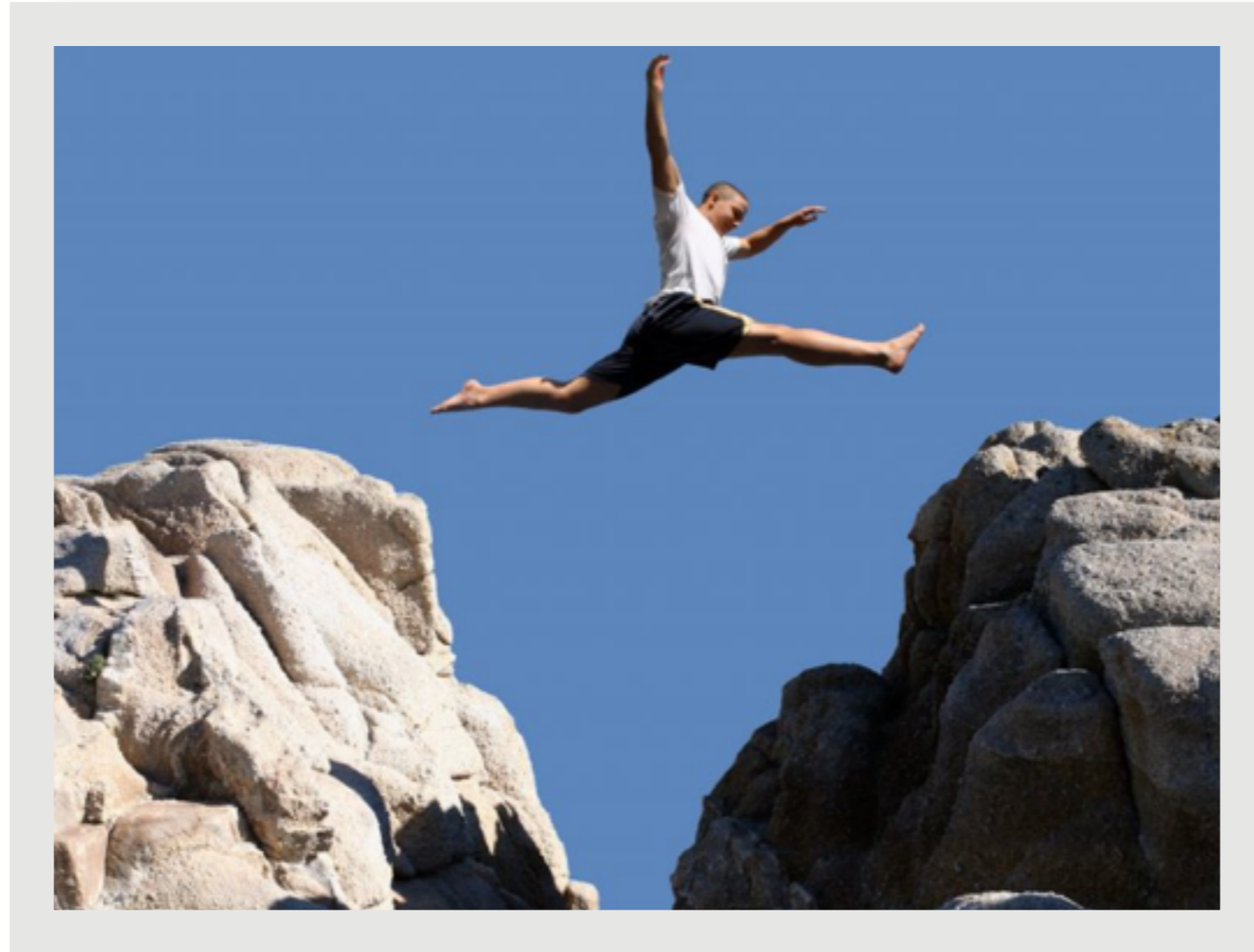
INTERNAL ASSESSMENT

What are your core competencies?

What are your gaps?



THE MEANING OF A GAP



A Gap is the difference between what is required for successful fulfillment of your goal and the current capacity of your organization to achieve it.

GAP CATEGORIES

External

- ◆ Shallow relationships with medical sector
- ◆ Lack of relationships with complementary CBOs
- ◆ Lack of competitiveness

Internal: Resources

- ◆ Financial
- ◆ Infrastructure - computers, building equipment
- ◆ Staffing

Internal: Systems

- ◆ Governance
- ◆ Marketing
- ◆ Financial (costing, pricing)

EXAMPLES OF GAPS (WEAKNESSES)

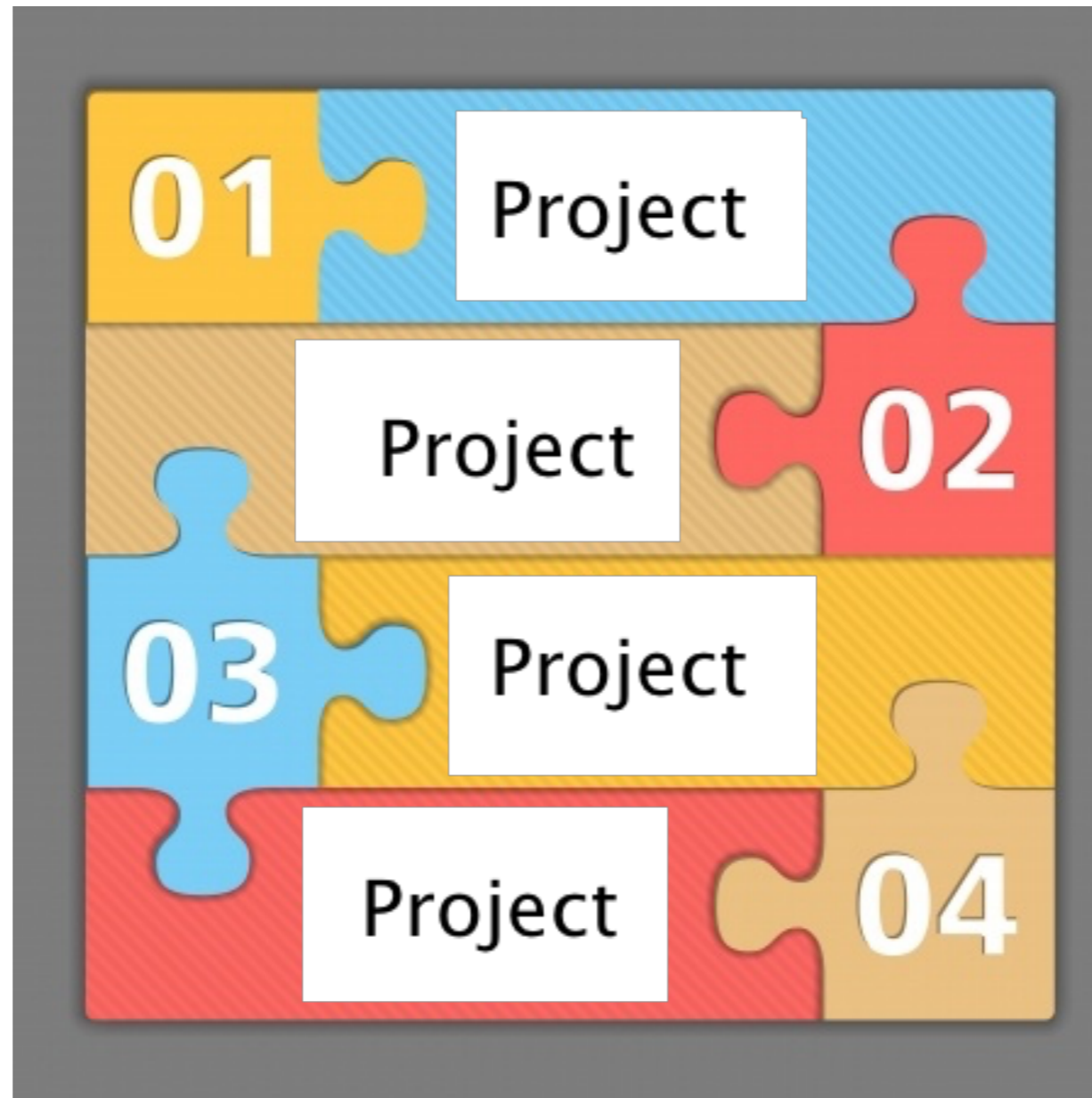
Actual State	Desired State
<p>Our IT system is ill equipped to communicate with the hospital's EHR & billing systems.</p>	<p>An IT system that seamlessly articulates with the hospital's EHR and billing systems.</p>
<p>We lack the methodology and the data to make the business case for our temporary housing program.</p>	<p>To understand and adopt a sound and appropriate methodology that can be combined with experienced-based data to make the business case for our temporary housing program.</p>
<p>We have no experience nor expertise with the pricing of our care transition services in a commercial arena.</p>	<p>To possess the capacity to price our care transition services for the purpose of net income maximization.</p>
<p>A staid organizational culture that does not recognize the need nor have the willingness to be business-minded.</p>	<p>An nimble, client-oriented and entrepreneurial culture attuned to the commercial world.</p>



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Internal Assessment
Section 5

YOUR CHIP IS A BUNDLE OF PROJECTS



DO NOT CHOOSE THE SOLUTIONS
(INDIVIDUAL PROJECTS) YET!



*You must FIRST understand
the causes behind the gaps.*

Do you know what this is?

The Federal Aviation Administration decided on April 19, 2013 to allow US Dreamliners to return to service after changes were made to their battery systems to better contain battery fires.[57] Japanese authorities announced they were doing the same for their airplanes. The causes of the battery failures are still unknown. There is still concern that because the root cause of the fires were not identified, the solutions put in place by Boeing will not be able to cover the full range of possible failure modes. These include problems that may arise from poor systems integration between the engine indicating and crew alerting system (EICAS) and the battery management system



ASSESSMENT PHASE: FIVE STEPS

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A LEXICON OF CAUSES

Type of Cause	Definition
Proximate	A cause that immediately precedes and produces the effect, as distinct from an Underlying cause.
Underlying	The cause of another cause.
Root	The most fundamental of Underlying causes – the one that lies at the root of the problem.
Principal	The cause that is most responsible and influential for the problem.
Secondary	A cause that is contributing to the problem but is subsidiary in influence to the Principal cause.
Addressable	A cause that the problem solver can do something about because it lies within their span of control.

EXAMPLE

Problem	House Destroyed	
Proximate Cause	Fire	
Underlying Cause	Fireplace Ember	
Underlying Cause of Underlying Cause	Faulty Screen	
Root Cause	Screen Not Maintained	
Secondary Cause	Wood Structure	
Addressable Cause	No Fire Extinguisher	
Non-Addressable Cause	Late Arrival of Fire Engine	

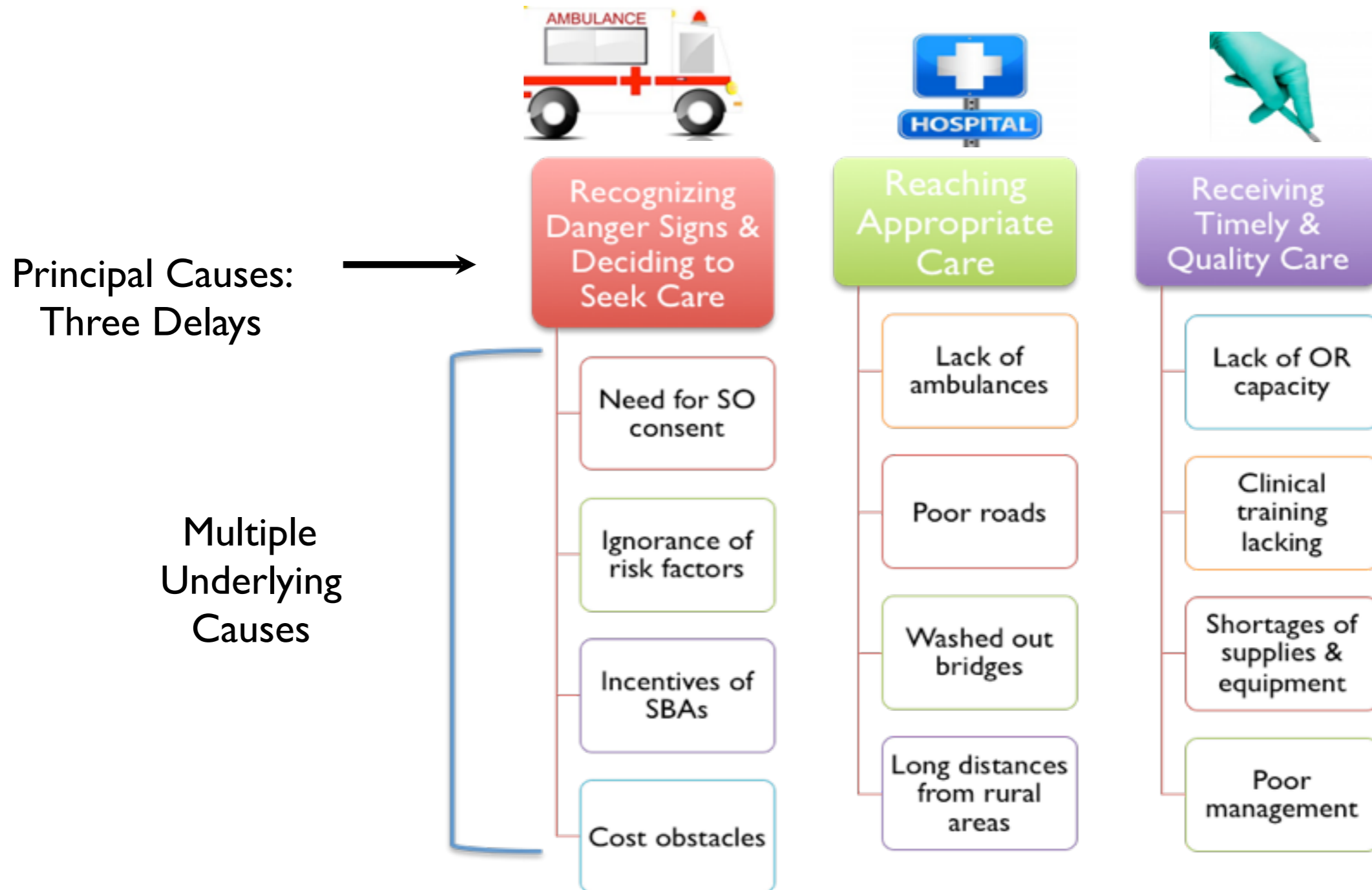
APPROACH TO CONDUCTING CAUSE ANALYSIS

Multiple Perspectives Required



- Employees
- Clients & Patients
- Vendors
- Community Members

STRUCTURE YOUR CAUSES

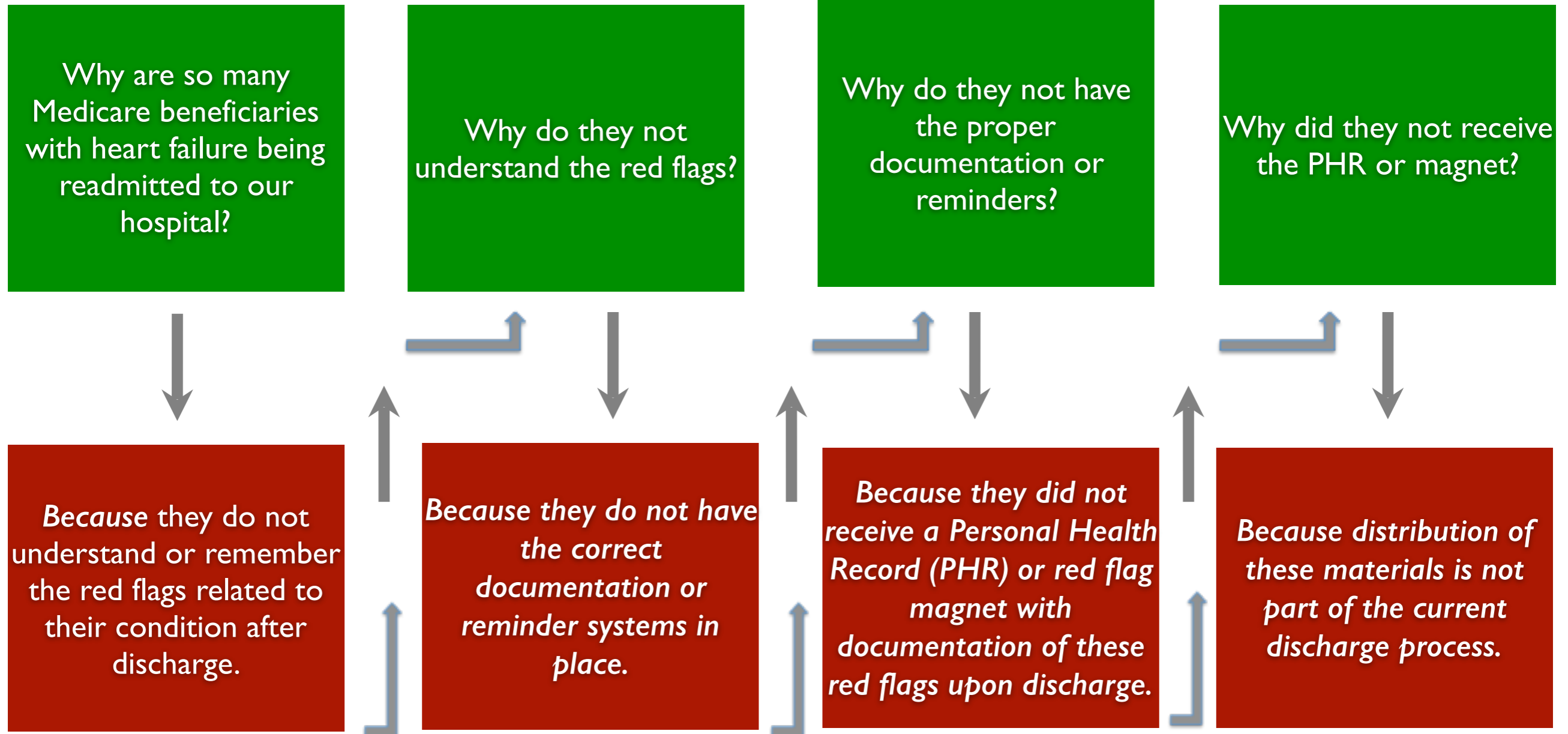


ROOT CAUSE ANALYSIS: FIVE WHY'S

Relentless
probing for the
underlying and
root causes.



EXAMPLE: READMISSIONS



ISSUE: MULTIPLE CAUSES: IDENTIFY THE PRINCIPAL CAUSE(S)



EXAMPLES OF PRINCIPAL CAUSES

Problem	Principal Cause
Medicare patients are being readmitted to the hospital within 30 days of initial discharge at above average rates	The discharge process does not involve distribution of the Personal Health Record (PHR) or red flag magnet upon discharge.
Our post-discharge clients are not showing up for their primary care appointments	Our clients lack reliable and affordable transportation
We have no good information on what our services costs us to deliver	Our accounting system was designed for grant funding rather than to support management decisions in a commercial world.

RATE CAUSES BY DEGREE OF INFLUENCE

Cause	Rating (1 – 5 where 5 is highly and 1 only modestly influential)
Lack of housing	1
Medication confusion	5
No care givers	3
Food insecurity	2
Lack of transport to primary care follow up	4

NOT ALL SOLUTIONS ARE PRACTICAL



Focus on solving the problems that you have the power and control to address.

RANKING CAUSES BY ADDRESSABILITY

Cause	Rating (1 - 5 where 5 is the most and 1 the least addressable)
Lack of housing	1
Medication confusion	5
No care givers	2
Food insecurity	4
Lack of transport to primary care follow up	3

COMBINE INFLUENCE AND ADDRESSABILITY

Cause	Influence	Addressability	Project Attractiveness
Lack of housing	1	1	1
Medication confusion	5	5	25
No care givers	3	2	6
Food insecurity	2	4	8
Lack of transport to primary care follow up	4	3	12

WHAT'S NEXT?

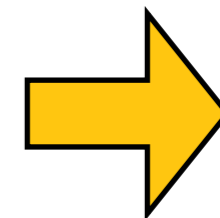
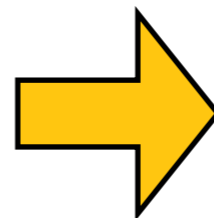
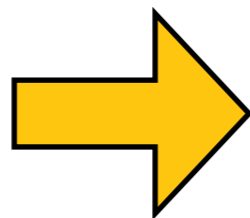


Assess

Conceive

Design

Implement



PROJECT CONCEPTION

Conceive the bundle of projects each of which is designed to address a shortfall or gap that might otherwise impede or prevent the achievement of the CHIP Goal.



DISCUSS PROJECTS WITH STAKEHOLDERS



IDENTIFY, AND CLASSIFY THE CHIP STAKEHOLDERS

	Who is in each box?	
	Not Influential	Influential
For	Problematic: Requires monitoring	Antagonistic: Needs active management
Against	Low priority	Champions: Keep involved

MANAGE THE STAKEHOLDERS

- What are their economic interests in the project?
- Will the project place demands on their time and energy?
- If they are not likely to be favorably inclined to support the project, what is your strategy to garner that support?
- If you think you will be unable to garner that support, how will you manage their opposition?
- Are there modifications to the project that will make support greater and opposition less?
- What information do they want from you?
- How do they want to receive that information?
- How frequently do they want to receive that information?

DESIGN PHASE

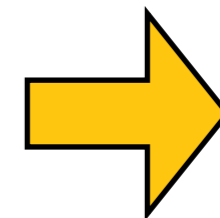
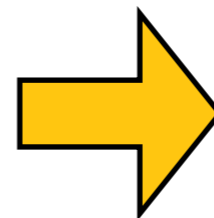
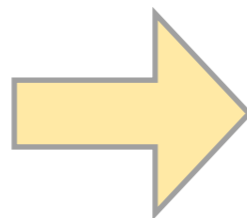


Assess

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CHIEF STEP IN DESIGN PHASE: DEVELOPING YOUR ACTION PLAN

Action steps are a comprehensive and sequential set of activities or tasks required to achieve a project's goal. The steps, placed in a logical order, include identification of the individual(s) responsible for each step, together with the time and financial resources required.



EXAMPLE: PROJECT ACTION STEPS

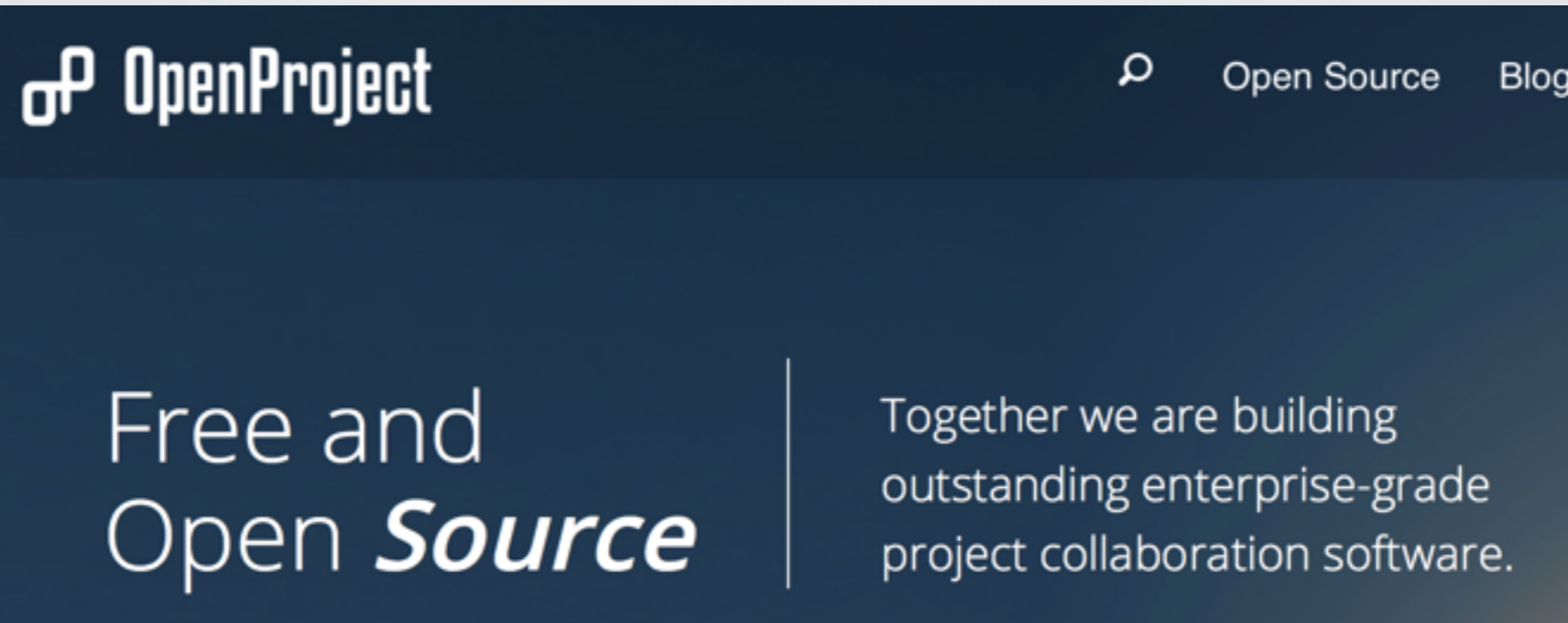
Example: Develop an IT data system that supports an integrated record management system.

- Step One: Assess current system's faults
- Step Two: Establish hardware requirements
- Step Three: Get hardware bids
- Step Four: Select hardware
- Step Five: Install hardware
- Step Six: Establish software requirements
- Step Seven: Etc.



Resources Required: Time
& Money





OPEN PROJECT

PROJECT MANAGEMENT SOFTWARE

IMPLEMENTATION PHASE

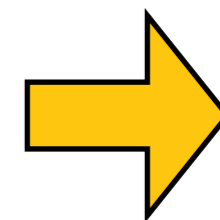


Assess

Conceive

Design

Implement



Complete prior to May 2016



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Cause Analysis (Section 6)
Project Statement, Goals & Objectives
(Section 7)
Action Planning (Section 8)