

Integration Learning Community Webinar 2: Project Management *Understanding and Using 6 Basic Tools*

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Referral		Co-Located		Integrated	
Key Element: Communication		Key Element: Physical Proximity		Key Element: Practice Change	
Level 1 Minimal Collaboration	Level 2 Basic Collaboration at a Distance	Level 3 Basic Collaboration On-Site	Level 4 Close Collaboration On-Site with Some System Integration	Level 5 Close Collaboration Approaching an Integrated Practice	Level 6 Full Collaboration in a Transformed/ Merged Integrated Practice

Our organization’s current level of integration is best described as:

- Level 1
- Level 2
- Level 3
- Level 4
- Level 5
- Level 6

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A year from now, we would like to move to

- Level 1
- Level 2
- Level 3
- Level 4
- Level 5
- Level 6

- Statement of Work
- Milestones and Deliverables
- Work Plan/Project Schedule
- Risk Management Plan
- Communication Plan
- Change Management

- A formal document that defines, guides the work
 - Provides a project Executive Summary
 - Details the business need for the project
 - Defines the product requirements
 - Defines the project milestones
 - Provides a summary schedule around project milestones with any necessary terms and conditions
 - Provides an area of signing approval

Do you have a Project Statement of Work?

Yes

No

Typical areas covered in an Integrated Health Work Plan

- Governance/Leadership (how IH fits in with the agency mission, leadership development and ongoing support)
- Financing
- Health Network (partnerships, contracts...)
- Integration team design (staff roles/responsibilities)
- Staffing (job descriptions, policy and procedure development, training)
- Access to Care (no show rates, same day access...)
- Clinical Services
- Wellness Programing
- IT/Data/QI

Milestone	Deliverables	Role	Name	Completion Date
Milestone 1: Quality Improvement Team (QIT) guides integration efforts.	1.1 Establish who will be on the QIT.	Executive Leadership	Kathy B.	2/15/14
	1.2 Establish a written schedule of when the QIT will meet.	Project Manager	John H.	2/30/15
	1.3 Outline key tasks of QIT.	Executive leadership	Mark M.	2/30/15
Milestone 2: Staff and clients are aware of the new integrated health initiative and developing agency-wide wellness culture.	2.1 Develop a Communication Plan.	Executive leadership	Janice K. and Kathy B	3/30/14
	2.2 Disseminate Communication Plan.	Project Manager	Susan D.	4/5/14
	2.3 Evaluate whether staff are getting the message.	Project Manager	Mark M.	6/30/14
Milestone 3: Information technology components to support implementation are in place.	3.1			
	3.2			
	3.2			

- The project schedule guides day-to-day project execution and is used for exercising control and monitoring progress
 - Lists Activities that are in scope (linked to milestones and deliverables)
 - Steps to completing the Activities are broken out into Tasks with estimated start / finish dates, and a way to show progress towards completion
 - Each Task has an identified “owner” who is responsible for ensuring the task is completed
 - Schedule needs to be closely monitored and controlled, and corrective action taken when it goes off track

Do you have Work Plan and Project Schedule?

Yes

No

- Identifies the factors that may interfere with project success in time, cost and scope
 - Details the actual nature of the risk
 - Specific strategy for how to address that risk
 - Mitigate
 - Manage
 - Avoid
 - Central to communicating around issues that may impede or are actually impeding progress

Do you have a Risk Management Plan?

Yes

No

- Defines the communication requirements for the project and how information will be distributed.
 - Role-based
 - What information will be communicated
 - How the information will be communicated
 - When will information be distributed
 - Who does the communication
 - Who receives the communication
 - How communications are archived for reference

- Face-to-Face Meetings with All Staff
- Monday Morning Memo (MMM) from CEO
- Governing Board Presentation
- Clinical & Administrative Supervisors
- Staff and Public Area Notices
- Community/Network Presentations
- Celebrations of Success

Do you have a Communication Plan?

Yes

No

- How the project aligns with the organization's mission and the strategic plan goals and objectives
- Develops a vision in partnership with project stakeholders
- Ensures clear understanding of how the project will impact individual responsibilities
- Identifies project champions who keep project momentum when things get difficult

1. Address change systematically and proactively
2. Start with executive level leadership (via the Project Steering Committee)
3. Involve every layer of the organization
4. Make a formal case – why and how
5. Leadership has “ownership” of the change
6. Communicate the change plan
7. Consider the organizational culture
8. Address the organizational culture
9. Expect the unexpected
10. Engage the individual

**Ten Guiding Principles of Change Management (2004).* Reggie Van Lee, John Jones, Paul Hyde, Gary Neilson, Andrew Tipping, DeAnne Aguirre, Wolfgang Schirra, Jörg Krings, and Claudia Staub. Booz Allen Hamilton, 2004.