PRACTICE CHANGE: THE PROCESS

AIM

Develop an action plan for implementing person-centered care (PCC) in your practice using the Ida tools.

DURATION

Preparation: 30 minutes

Session: 1 - 1.5 hours

PREPARATION

Supplies

- Sticky notes and pens
- Flip chart or whiteboard

Note...

If your team completed Mindset Change *earlier:*

- Revisit your team's mind map and the shared understanding of person-centered care that you wrote down. Think about how you will present it when you begin the Practice Change session.
- Remind all team members to try the Ida tool you chose with at least two clients before you begin the Practice Change session.

If your team is starting with Practice Change*:*

- Learn about an appreciative approach and how to facilitate discussions in an appreciative manner to get the most out of Practice Change.
- As a team, choose one Ida counseling tool. If you and the group are new to the Ida tools, we recommend that you start with the Motivation Tools to help your clients reflect on why they want to take action and what prevents them from doing so.
- Ask your team to try using the tool with at least two clients before starting Practice Change.

- For guidance on how to use the tools, consider having your team take one of our courses in the Learning Hall like "Getting Started with Person-centered Care" or "Client Engagement and Ida Motivation Tools."
- Arrange a training session on the tool if needed.

SESSION PROGRAM

Welcome

- It is not necessary to complete Mindset Change before you begin, but if you have, show the mind map again and the summary of person-centered care that you wrote together.
- Explain that the goal of today's session is to create an action plan for implementing PCC in your practice.
- Share ground rules for the session:
  - Listen carefully to what everyone has to say
  - Ask open-ended questions
  - Be non-judgmental
  - Focus on the positives and what works well today
  - Give appreciative feedback

Step 1: Share experiences from the clinic

In this step, team members will share what it was like to use the Ida tool you've chosen. You will note down what has helped or hindered team members.

- Prompt each team member: "In the past few weeks, you have been using the Ida tool we chose. What was it like to use the tool with clients?"
- Once everyone has shared, say: "Let's create lists of factors that have helped us and factors that have hindered our ability to implement the Ida tool."
- Draw a chart with two columns, one labeled "what helps," another named "what hinders."
- Ask the group: "What factors or circumstances helped you use the tool? What factors have hindered you?"

- Write down on sticky notes each of the factors and sort them on the wall or whiteboard under the relevant heading.

Examples of what helps and what hinders

What helps might include:

"We were given extra time for the appointments where we tried using the tool."

"I got a quiet location for the appointment."

"My colleague mentored me on the use of the tool before I tried it out."

"My managers were patient and did not expect me to get it right the first time."

What hinders could include:

"The client was late so I did not have sufficient time."

"I felt like I needed more formal training first."

"I was unsure when in the appointment I should use the tool."

"I was unsure what to do with the client's answers."

Step 2: Turn hindrances into factors that can help

In this step you will guide participants to review "what helps" and "what hinders" and arrive at ideas for how to overcome hindrances.

- Discuss which activities and resources could help overcome each of the listed hindrances:
  - Have permission to postpone other parts of the appointment and prioritize using the tool in case the client is late
  - Structured training
  - A one-page guidance document on how and when to use the tool during the appointment

    - Managers clearly acknowledge that learning to use the tool is a process that takes practice
- Write these factors down on sticky notes
- Stick them on the wall in the "what helps" column and remove each hindrance as you find a matching factor that can help overcome it. In the end you will have a list showing only helpful factors.
- Summarize the "what helps" list and ask the group if they have any last thoughts or comments.

Step 3: Choose focus points for change

In this step, you will select five-to-eight factors from the "what helps" list. These will become your shared focus points for integrating PCC into your clinic.

- Ask team members to go up to the "what helps" list and put a star next to the top three factors they think are the most important to focus on in order for the clinic to implement PCC. Each person gets three stars and can only use one star per factor.
- Select the five-to-eight factors with the most stars. If there are fewer than five, then work with all of the factors that got stars.
- Read the selected factors out loud and invite the group to discuss them.
- Remember to photograph or document the "what helps" and "what hinders" board and the selected five-to-eight focus points for future reference.

Step 4: Spider Web survey

You must complete this step if you plan to evaluate your results in the long-term. If you plan to only monitor short-term results, this step is optional.

The Spider Web is an online survey that allows you to identify to what extent a given focus point is present in the clinic. The Spider Web gathers the opinions of each team member anonymously and can be particularly helpful if there are quiet participants in the group. Note that you must be logged in to your Ida account in order to access the Spider Web.

- Prepare the Spider Web using the five-to-eight focus points your team selected in Step 3. Click “create team survey” and enter the email addresses of your participants. This will take approximately five minutes. Give the participants a brief break while you set the survey up.
- Introduce the exercise. Tell participants: “You will be asked to indicate on a scale of one-to-five to what extent a given focus point is already present in the clinic. Your answers are anonymous. The survey results will help us identify “quick wins” –things that can be changed without much effort – and will also give us a snapshot of our clinic today that we can use to track our progress later in the year.
- Ask them to open up the email and complete the survey. Note that they must have an Ida account and be logged in to access the survey. It should take about five minutes to complete.
- Ensure all team members have completed the survey before proceeding.
- Consider how you will present the survey results to the group when you gather the participants and proceed to Step 5.

Step 5: Create action steps and agree on roles

In this step, you will decide what concrete action steps your team will take to successfully implement PCC using an Ida counseling tool.

- It is not necessary to complete the Spider Web, but if your team has, present the results. Discuss what this survey tells you about your ability to integrate the Ida tool today.
- If your team has not used the Spider Web, consider as a group: What can be changed most easily? What is most important for you to focus on right now in order to successfully implement the Ida tool?
- Based on the points the group has chosen to focus on, ask team members to suggest concrete action steps for how to reach your goal. For example:
    - Set up a mentoring plan.
    - Revise procedures to allow more time in appointments.
    - Schedule weekly training sessions.
- Write down their suggestions on a flip chart or whiteboard and discuss which steps you want to move forward with.

- Ask all team members to write their name next to the action steps they would like to work on.
- Agree on a timeline for each action step.

Step 6: Imagine the future

In this step, you will discuss how the action steps can make your clinic and daily practice more person-centered.

- Talk about what your clinic will be like and how the care you provide will look once you have implemented the action steps.
- Write down all of your visions on a flip chart or whiteboard.
- Discuss the visions. If you completed Mindset Change, how do your visions compare to the shared understanding of person-centered care that your team reached in Step 3 of Mindset Change?
- Talk about how your action plan will help you become more person-centered. For example:
    - Better treatment outcomes
    - More efficient appointments
    - Happier clients
    - Better work environments
- Thank everyone for their time and contributions to the process.
- Remember to photograph or document visions and action steps for later use.

idainstitute
THE HEARING CO-OPERATION

PRACTICE CHANGE: SHORT TERM MONITORING

AIM

Monitoring your progress helps you and your team stay on track and identify where changes need to be made in order to reach your goal of implementing person-centered care using an Ida tool.

Complete this short-term monitoring process two-to-three weeks after you've finished Practice Change. For best results, complete this process again two-to-three weeks later.

DURATION

Preparation: 15 minutes

Session: 15-30 minutes

PREPARATION

Supplies

- Print out a Triangle form for each participant
- Pens

Note…

- Revisit the Practice Change process your team completed. Consider how you will summarize the vision that you developed together in Step 6.

SESSION PROGRAM

Welcome

- Remind everyone what took place during Practice Change:

"A few weeks ago we identified the key factors that would be needed in order to successfully implement an Ida tool and work in a more person-centered way. We created a list of action points. In the last few weeks we have been taking small steps to bring us closer to realizing our shared vision. Let's revisit that vision."

- Summarize the vision that your team developed in Step 6 to remind everyone what you are working toward.

Step 1: Check-in
In this step the team will share their experiences in implementing the Ida tool. This process allows you to share knowledge and tips to support each other in working toward the shared vision.

- Ask participants to share with the group a recent experience when they took a step towards implementing an Ida tool that they feel really proud of."
- You may choose to have people reflect silently first, or take a couple minutes to jot down their thoughts before starting the conversation.

Step 2: The Triangle
In this step team members use the Triangle to reflect on how successful they have been at using the Ida tool with clients. The conversation creates a shared understanding of the current status and the steps that lie ahead for your change process.

- Introduce the Triangle as a way of comparing the factors that helped you implement the tool, and what proved to be a hindrance.
- Give a copy of the Triangle to each participant and ask them to fill it out.
- Once everyone has filled out the Triangle, ask each person to share their rating on how close they are to reaching their goal.
- Encourage people to explain why they gave the rating they did, what helped them the past few weeks, and what hindered. Make sure each person gets a turn to share. Ask the group: "Is there any hindrance you have mentioned that could be overcome through the help and support of the whole team?"

- Note these down as action steps that can be taken to further improve the team's ability to use the tool. Assign roles and timelines to each action point, as needed.
- Summarize what was learned today and the general progress that has been made.
- Have each person save their copy of the Triangle in case you will complete another short-term evaluation in the future.