Project planning & implementation in a cash strapped NHS

PCRS UK Workshop
June 2018
Part 1: The secrets to making your project happen
A project is...

- A set of activities with a beginning & an end
- Set up to achieve a particular purpose
- To a set quality
- Within given time constraints
- And cost limits
- Different to a programme
Why do projects fail?

- Lack of top level support & leadership
- Don’t effectively engage key people
- Poorly planned & ill-defined
- Inadequately monitored, controlled & managed
- Fail to take account of the bigger picture
- Poor communication
- Fail to split into bite-size chunks
You can make your idea a reality if you...

• Are clear about what you want to achieve and why
• Engage the right people – what’s in it for me?
• Work out what is needed (no assumptions)
• Agree who will do what, by when & how
• Monitor progress together
• Make sure it sticks – plan for permanence
• Celebrate successes
Suggested approach

• Begin with the end in mind
• Find your allies: establish your “project team”
• Clarify aims and objectives
• Be clear where you are starting from (no assumptions)
• Develop the plan – who will do what by when?
• Measure what matters – baseline and ongoing
• Carry out actions
• Monitor and check progress regularly
• Communicate, celebrate & close
So what is your project?
Be clear about what it is you want to achieve

• Take a minute to think about your project.
• How would you describe it in 30 seconds?
What are we trying to accomplish?

How will we know that a change is an improvement?

What changes can we make that will result in the improvements we seek?

Act
Plan
Study
Do

Model for Improvement
## Aim statement

<table>
<thead>
<tr>
<th>What will we do?</th>
<th>Describe the project</th>
</tr>
</thead>
</table>
| For whom?       | Who will be affected by it?  
Who will be affected by it?  
Which patient groups / teams / organisations are you targeting? |
| By when?        | When will you have achieved it by? |
| How much?       | Quantify the impact (e.g., no. of people affected, savings made).  
How will you know you have succeeded? |
| Compared to what? | When and where are you starting from – what is your baseline? |
| Why?            | What difference will this make?  
Why does it matter? |
Your team
Why might we want to work with others?

- engagement
- support
- awareness
- problem solving
- sponsor
- sabotage...

- Who are our stakeholders?

- *Remember the wisdom of geese – go further together*
Who are your stakeholders?

• Take five minutes individually to identify stakeholders for the project.
• Write each one on a separate sticky note
• Think about those who use, fund, promote, support, have influence over or compete with your service / project
• Share your thoughts in your group
Use the ‘9 Cs’ to ensure that you have included all relevant stakeholders:

- Commissioners: pay you to do things
- Customers: acquire or use your product or service
- Collaborators: work with you to develop and deliver services
- Contributors: those from whom you acquire services / products
- Channels: provide you with a route to a market or customer
- Commentators: whose opinions are heard by customers and others
- Consumers: are served by our customers
- Champions: believe in and will actively promote the project
- Competitors: work in the same area & offer similar services
Stakeholder mapping

• Power:
  • What power or authority do they have over the project (not always formal, not always positive)

• Impact:
  • How much impact (direct or indirect) does the project have on this stakeholder?
Stakeholder mapping

- Power
  - Low
  - High
- Impact
  - Low
  - High
## Prioritising Stakeholders

<table>
<thead>
<tr>
<th>Power</th>
<th>Satisfy</th>
<th>Manage</th>
<th>Inform</th>
<th>Project has</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Power over project</td>
<td><strong>Satisfy</strong> Opinion formers. Keep them satisfied with what is happening and review your analysis of their position regularly</td>
<td><strong>Manage</strong> Key stakeholders who should be fully engaged through full communication and consultation</td>
<td><strong>Inform</strong> Patients often in this category. Increase their influence by organising into groups or taking active consultative work</td>
<td>Little or No Impact on stakeholder</td>
</tr>
<tr>
<td>Little / No Power over project</td>
<td><strong>Monitor</strong> This group may be ignored if time and resources are stretched</td>
<td>Project has <strong>Little or No Impact</strong> on stakeholder</td>
<td></td>
<td>High impact on stakeholder</td>
</tr>
</tbody>
</table>

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What do stakeholders need to know?

• What we are doing
• Why we are doing it
• Who is doing it
• How well we are doing...
  ... which includes measurement and data
• What’s in it for them?
| Who are they?  
*Specify their roles but also consider their status, connections, whether they are supporters, peers, influencers, saboteurs, funders, delivery partners...* | What do they know?  
*About you, the subject, the language, the history, the context, the people* |
| --- | --- |
| What do they fear?  
*Costs, time, boredom, requests they can’t meet, missing something, letting people down, more work, bad publicity* | What do they want?  
*To make a difference, save money, hit targets, promotion, fame, a cause, their lunch...* |
Getting started

• Get the right people involved and meet them regularly
• Be clear on the goal and timescale
• Develop an action plan with names and timescales
• What resources do you have / need?
• Start small!
• Communicate – progress, actions, feedback
Part 2: Keeping focused and moving forward
Recap

• Context in which we are all working
• What we mean by a project & being clear about our project goals
• How to convince others to help us implement it
• Who to engage and how
• How current policy and priorities can be helpful
• Being mindful not mind full
## The 3 reasons for Measurement

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Judgement</th>
<th>Research</th>
<th>Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aim</td>
<td>Achievement of target</td>
<td>New knowledge</td>
<td>Improvement of service</td>
</tr>
<tr>
<td>Testing Strategy</td>
<td>No tests</td>
<td>One large test</td>
<td>Sequential tests</td>
</tr>
<tr>
<td>Sample Size</td>
<td>Obtain 100% of available, relevant data</td>
<td>“Just in case” data</td>
<td>“Just enough” data, small sequential samples</td>
</tr>
<tr>
<td>Type of hypothesis</td>
<td>No hypothesis</td>
<td>Fixed hypothesis</td>
<td>Hypothesis flexible, changes as learning takes place</td>
</tr>
<tr>
<td>Variation (Bias)</td>
<td>Adjust measures to reduce variation</td>
<td>Design to eliminate unwanted variation</td>
<td>Accept consistent variation</td>
</tr>
<tr>
<td>Determining if a change is an improvement</td>
<td>No change focus</td>
<td>Statistical tests (t-test, F-test, chi square), p values</td>
<td>Run charts or Shewhart control charts</td>
</tr>
</tbody>
</table>

Source: Robert Lloyd IHI 2006
How do you know...

Whether what you are doing is...

- Better
- Worse
- The same?
- Better, worse or the same as what everyone else is doing?
What are we trying to accomplish?

How will we know that a change is an improvement?

What changes can we make that will result in the improvements we seek?

Source: www.ihi.org
What do we want to know?

- How well we are doing
- Whether the changes we make have any impact
- Whether that impact is for better or worse
- How much better or worse things are
- How much difference there is in what different people or systems are doing
- Whether that change is sustainable
20% improvement!

Massive improvement in COPD on GSF register!

Baseline - 2009/10 audit

Current - December 2010
Why not just use averages?

‘If I stick my right foot in a bucket of boiling water and my left foot in a bucket of ice water, on average, I’d feel pretty comfortable.’

Davis Balestracci
So what do we need to consider?

- Where are you really starting from?
- Make it visible
- Determine what you want to achieve
- Know why you are measuring
- Measure dynamically
- Measure what is useful
- Measure only as much as you need
- Look across the system
- Make it meaningful, make it easy
What kind of measure?

- **Outcome Measures (voice of the customer or patient):** How is the system performing? What is the result? What difference are we seeing as a result of the system / project / process?

- **Process Measures (voice of the workings of the system):** Are the parts/steps in the system performing as planned?

- **Balancing Measures (looking at a system from different directions/dimensions):** Are changes in one part of the system causing problems in another part?

  “Seek usefulness, not perfection”

  Nelson et al, 1998
# Measurement plan

<table>
<thead>
<tr>
<th>Objective</th>
<th>1.</th>
<th>2</th>
<th>3</th>
<th>4</th>
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<tbody>
<tr>
<td>How will we know we have achieved it?</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>What needs to be measured?</td>
<td></td>
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<tr>
<td>How will we measure it?</td>
<td></td>
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<td></td>
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<tr>
<td>How often?</td>
<td></td>
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<td></td>
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<tr>
<td>Who will do it?</td>
<td></td>
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</table>
Not everything that can be counted matters. And not everything that matters can be counted.
Action planning - things to consider

• What are you trying to achieve and how will you know you have done it?
• What is in and out of scope?
• What are the broad stages you will need to consider?
• What might get in the way and how might you manage that?
It’s easy...

Just do it  Efficient service
Actually, it looks like this...

In this case, there are numerous **direct** and **indirect effects** between the independent variables and the dependent variable. For example, $X_1$ and $X_4$ both have **direct effects** on $Y$ plus there is an indirect effect due to the **interaction** of $X_1$ and $X_4$ conjointly on $Y$.

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Key Reference on Causal Modeling

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R = residuals or error terms representing the effects of variables not included in the model.
Why do projects fail?

• Lack of top level support & leadership
• Don’t effectively engage key people
• Poorly planned & ill-defined
• Inadequately monitored, controlled & managed
• Fail to take account of the bigger picture
• Poor communication
• Fail to split into bitesize chunks
Do I really need a plan?

- If you don’t know where you are going, you are likely to end up somewhere else...
- Helps clarify how we will know whether / when we have got there
- Focuses attention on what we need to tackle and avoids project “creep”
- Manages people’s expectations
- It’s your plan – it can change.
A Cunning Plan Should Include...

• What is to be achieved (& why it’s important)
• What has been assumed
• What needs to be done (and what won’t be done)
• Who will do what
• How long it will take
• How much it will cost
• What is needed to do it
• How it will be done
• What it will depend on
A Cunning Plan Should Not...

- Tell you everything in unnecessary detail
- Require more effort than benefits
- Lull people into a false sense of security
- Become a bureaucratic nightmare
- Be done in isolation
- Be forgotten!
Developing a plan

Goal

- What, how much, for whom, by when, why

Requirements

- Essential factor
- Essential factor
- Essential factor

Actions

- What, who, when
- What, who, when
- What, who when
- What, who, when
Action planning

See separate slide set for Sticky Steps instructions
30 day action plan
Goal:

<table>
<thead>
<tr>
<th>What will you do?</th>
<th>Who will do it?</th>
<th>When? (start / finish)</th>
<th>How will you know?</th>
<th>What next?</th>
</tr>
</thead>
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How will you keep to your plan?

- Monitor progress
- Meet regularly
- Check against the time line
- Hold yourselves and each other to account
- Use the data (don’t blame the messenger!)
- Identify what gets in the way and who can help resolve it
- Celebrate successes
- Communicate
Recap

• Be clear about what you want to achieve – what is your aim?
• Know where you are starting from (so you know what needs to change and whether you have made a difference)
• Develop a plan
• Keep things simple
• Work with others
• Take time to review & refine ideas
• Think about measurement: how will you know when or whether you have succeeded?
Your lift pitch – think about:

• The practical element of your project / idea / service
• What makes your project special?
• What benefit is / will be experienced?
• Make it sound natural & conversational, keep eye contact
• Avoid jargon
• Make solid points (not waffle)
• Emphasise how people will benefit
• Emotive words (not adjectives)
• Call to action

Based on “Some people call it an elevator pitch”, Megan Hills, Mymarketingthing.com
Example

• “I run Well House which people often call Sheffield’s Health Sanctuary.

• We’re a little different from many other Chinese Medicine clinics because we really are holistic. We combine acupuncture with massage and herbal supplements, and we take the time to give diet, exercise and lifestyle advice.

• This combination and the level of care creates great health results – and our clients leave feeling better about everything.”

• “We give free 20 minute initial consultations to talk about what’s going with your health – here’s my card if you know anyone who might find that helpful.”
Getting started

• Be clear about what you want to achieve, and why
• Get the right people involved and meet them regularly
• Be clear on the goal and timescale
• Develop an action plan with names and timescales
• What resources do you have / need?
• Start small! Do something! Now!
• Communicate – progress, actions, feedback
• It doesn’t have to be perfect first time to succeed