

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 bitesize 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

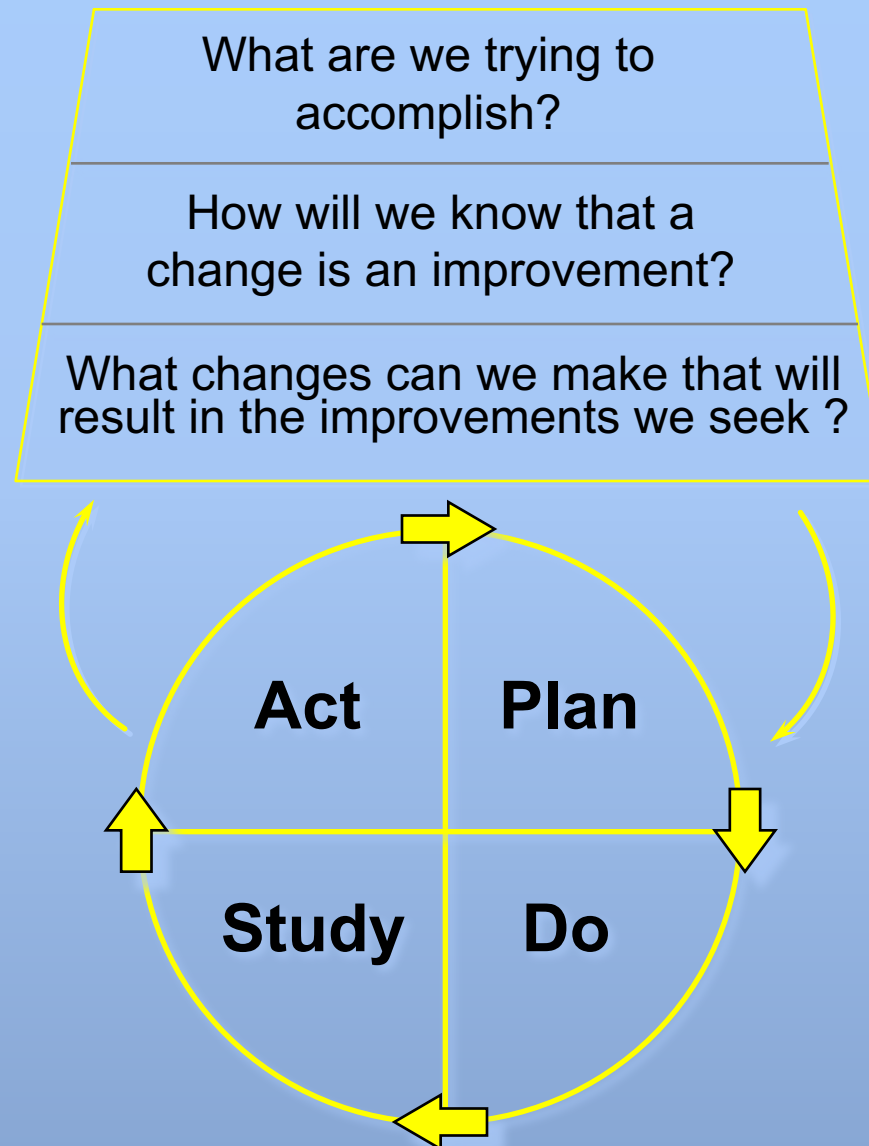
- Begin with the end in mind
- Find your allies: establish your “project team”
- Clarify aims and objectives
- Be clear where you are starting from (no assumptions)
- Develop the plan – who will do what by when?
- Measure what matters – baseline and ongoing
- Carry out actions
- Monitor and check progress 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?

Model for Improvement



Aim statement

What will we do?	<i>Describe the project</i>	
For whom?	<i>Who will be affected by it? Which patient groups / teams / organisations are you targeting?</i>	
By when?	<i>When will you have achieved it by?</i>	
How much?	<i>Quantify the impact (eg no. of people affected, savings made). How will you know you have succeeded?</i>	
Compared to what?	<i>When and where are you starting from – what is your baseline?</i>	
Why?	<i>What difference will this make? Why does it matter?</i>	

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

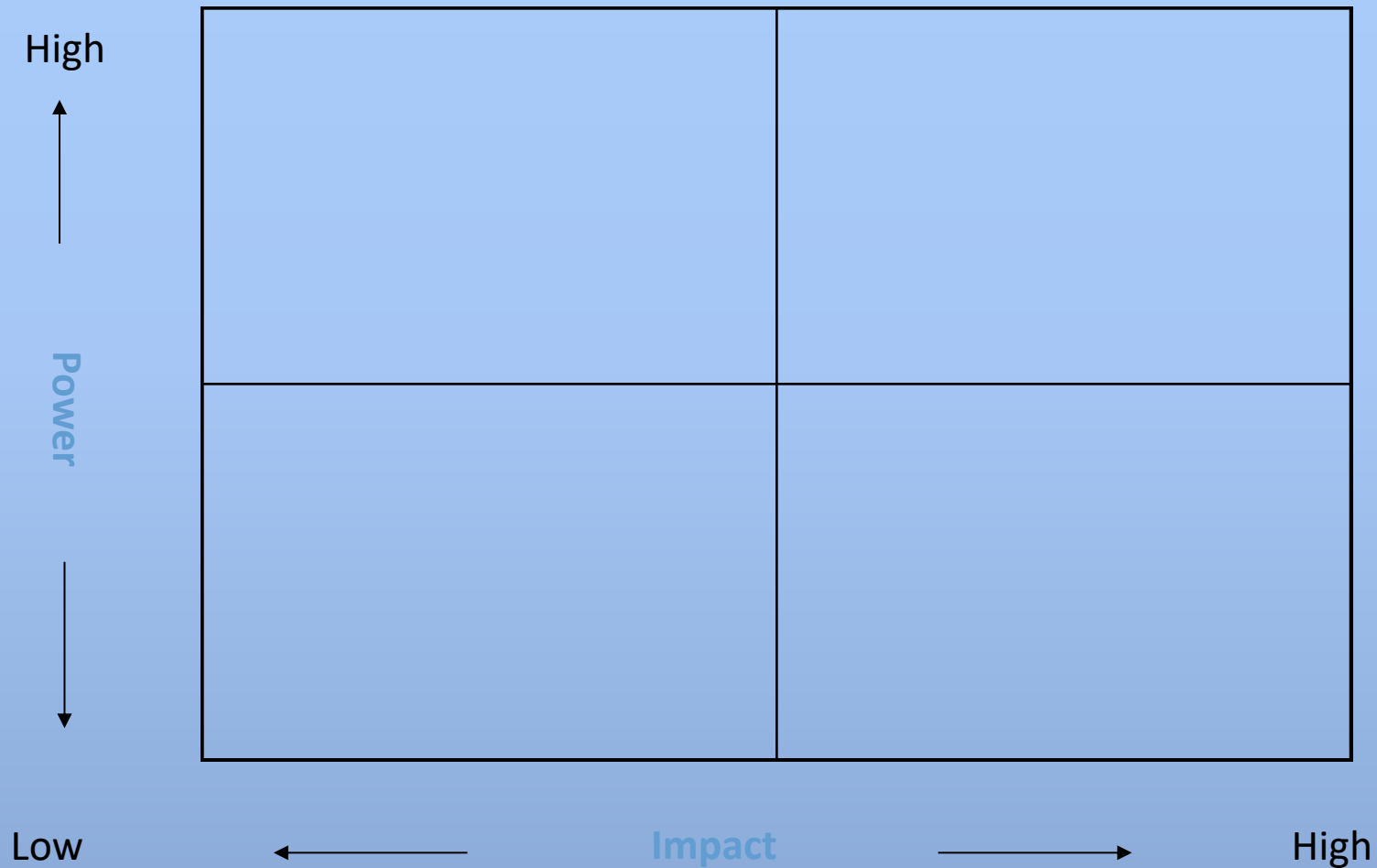
Use the '9 Cs' to ensure that you have included all relevant stakeholders:

- 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



Prioritising Stakeholders

Stakeholder has **High Power** over project

Satisfy

Opinion formers. Keep them satisfied with what is happening and review your analysis of their position regularly

Manage

Key stakeholders who should be fully engaged through full communication and consultation

Stakeholder has **Little / No Power** over project

Monitor

This group may be ignored if time and resources are stretched

Inform

Patients often in this category. Increase their influence by organising into groups or taking active consultative work

Project has **Little or No Impact** on stakeholder

Project has **High impact** on stakeholder

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

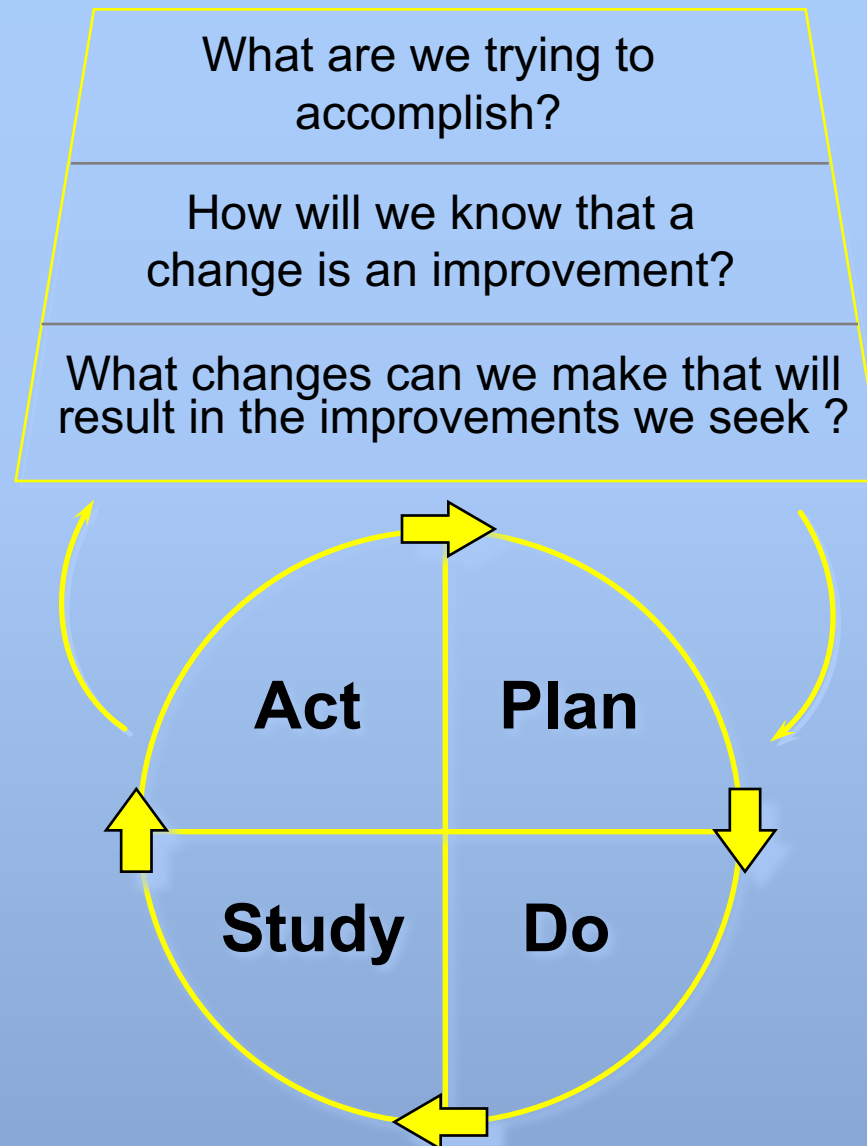
Characteristic	Judgement	Research	Improvement
Aim	Achievement of target	New knowledge	Improvement of service
Testing Strategy	No tests	One large test	Sequential tests
Sample Size	Obtain 100% of available, relevant data	"Just in case" data	"Just enough" data, small sequential samples
Type of hypothesis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

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?

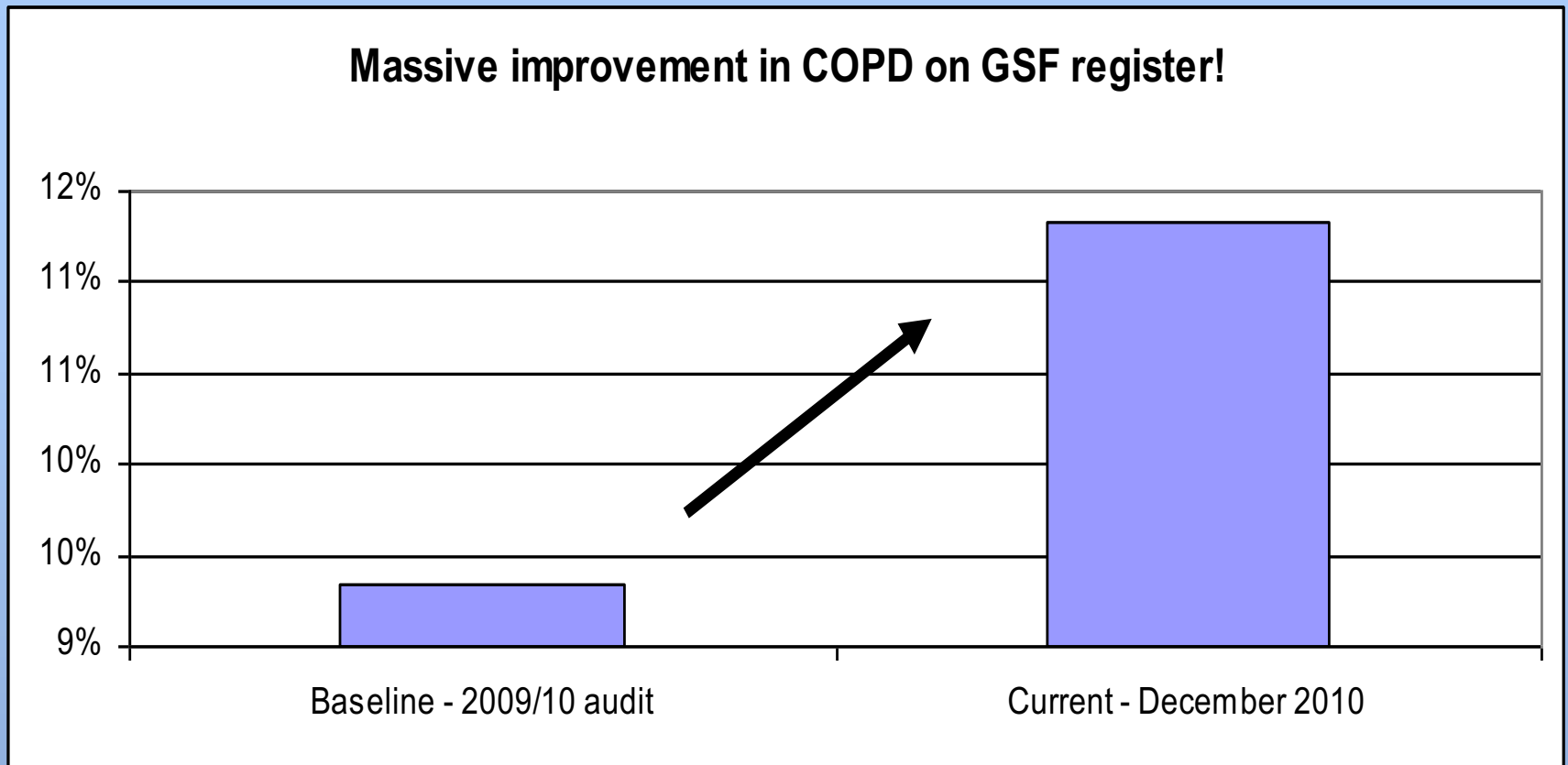
Model for Improvement



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!

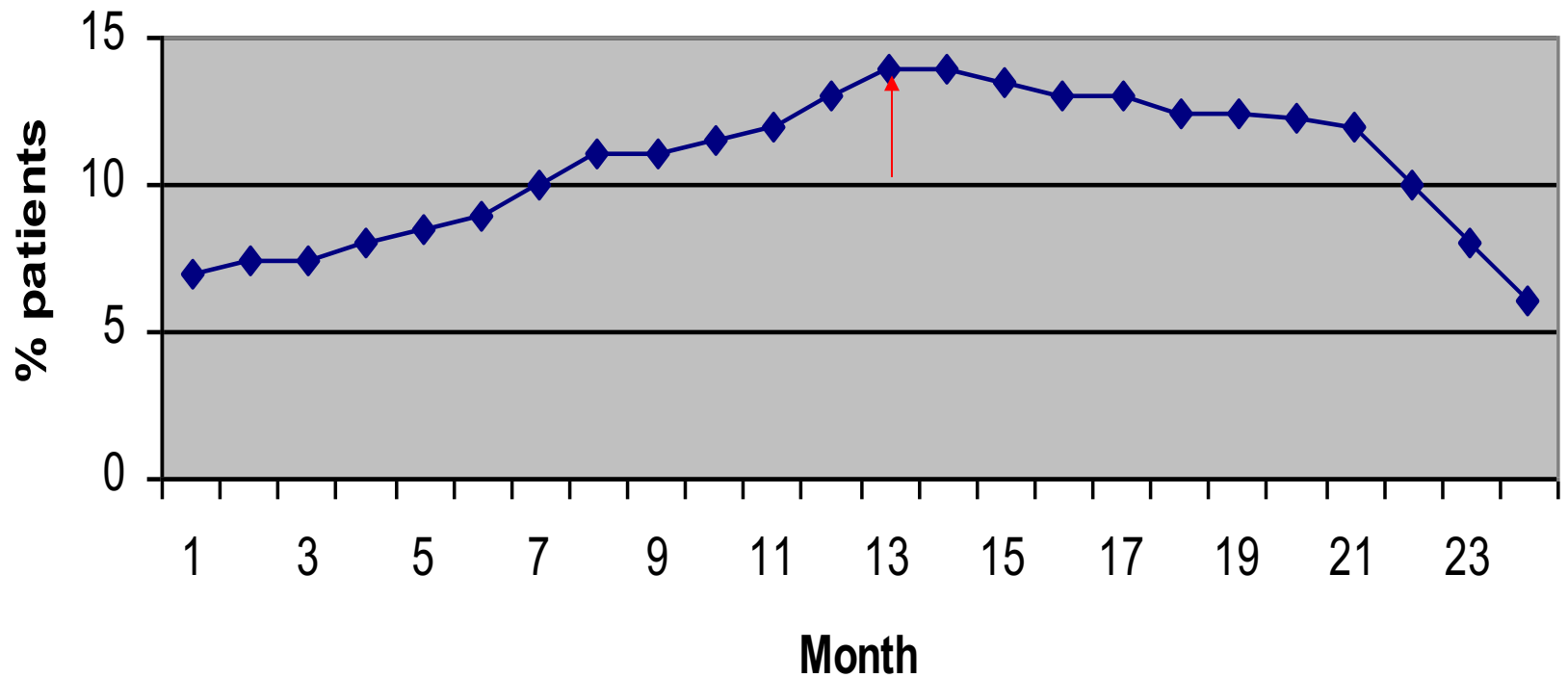


Why not just use averages?

‘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

Percentage on register



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

Objective:	1.	2	3	4
How will we know we have achieved it?				
What needs to be measured?				
How will we measure it?				
How often?				
Who will do it?				

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...

X

Just do it

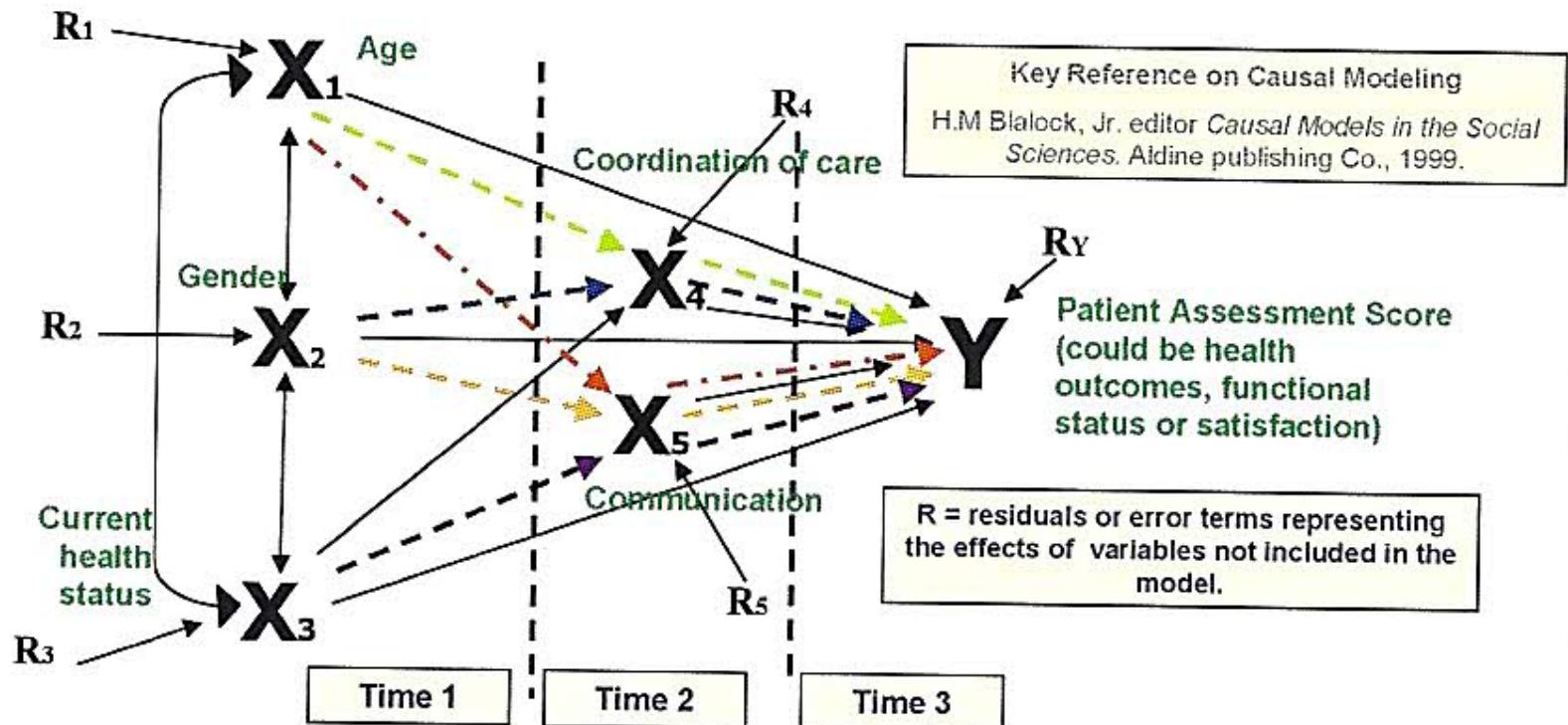


Y

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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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.

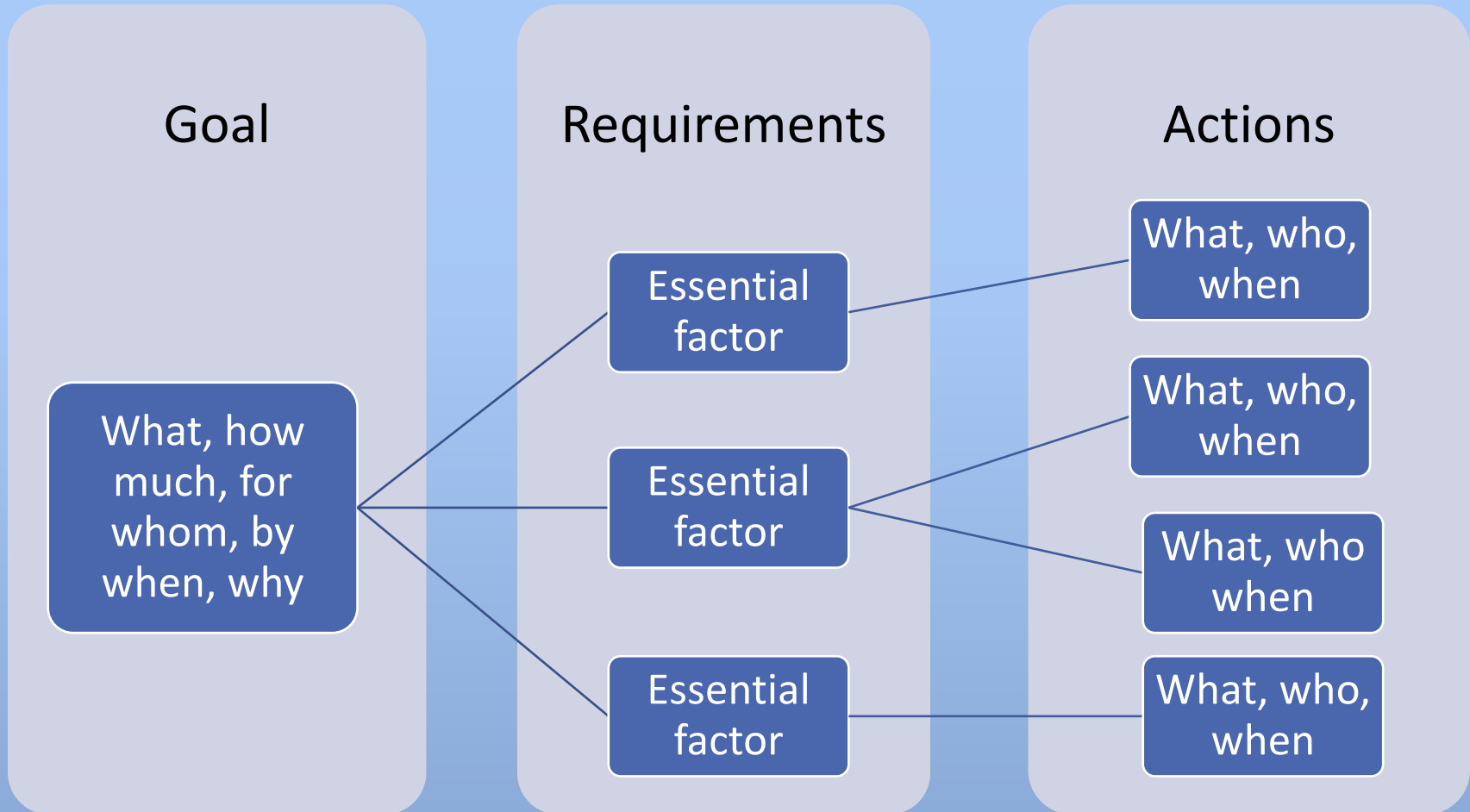
A Cunning Plan Should Include...

- 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



Action planning

See separate slide set for Sticky Steps instructions

30 day action plan

Goal:

What will you do?	Who will do it?	When? (start / finish)	How will you know?	What next?

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