

# UNDERSTANDING HOW CHANGE IMPACTS ORGANIZATIONS, AND EFFECTIVE RESPONSES TO AN EVOLVING ENVIRONMENT

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1:00 PM EST / 10:00 AM PST

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# JSI RESEARCH & TRAINING INSTITUTE, INC.

Public health consulting company

Capacity building assistance (CBA) provider

- Organizational infrastructure
- Evidence-based interventions
- Monitoring and evaluation



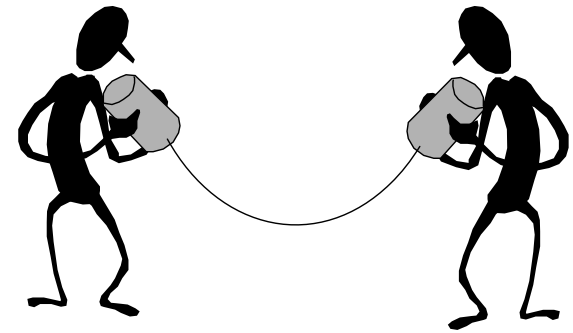
# Learning Objectives



1. Identify stages of response to change
2. Identify core components of change management strategies
3. Describe rapid cycle improvement

# WEBINAR BASICS

- Interactive functions
  - Polls
  - Chat
  - Raise hand / Unraise hand



- Chat to everyone for questions or comments or to the host for technical issues
- Open phone lines for discussion


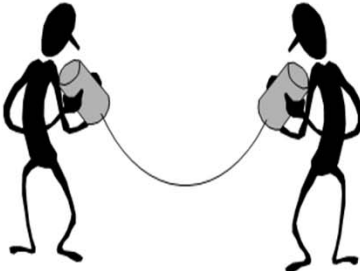
Cisco WebEx Meeting Center - Change Mgmt Test 2

File Edit Share View Audio Participant Meeting Help

Quick Start Meeting Info Change Manage... New Whiteboard

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Full Screen 91% View

Participants Chat Notes

Speaking:

Morgan (me)

Alexia Eslan (Host)

Raise Hand Audio

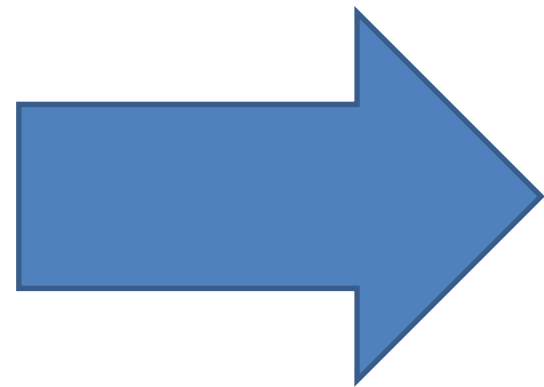
Send to: Alex... (Host & Presenter)

Select a participant in the list. First, type chat message, and send...

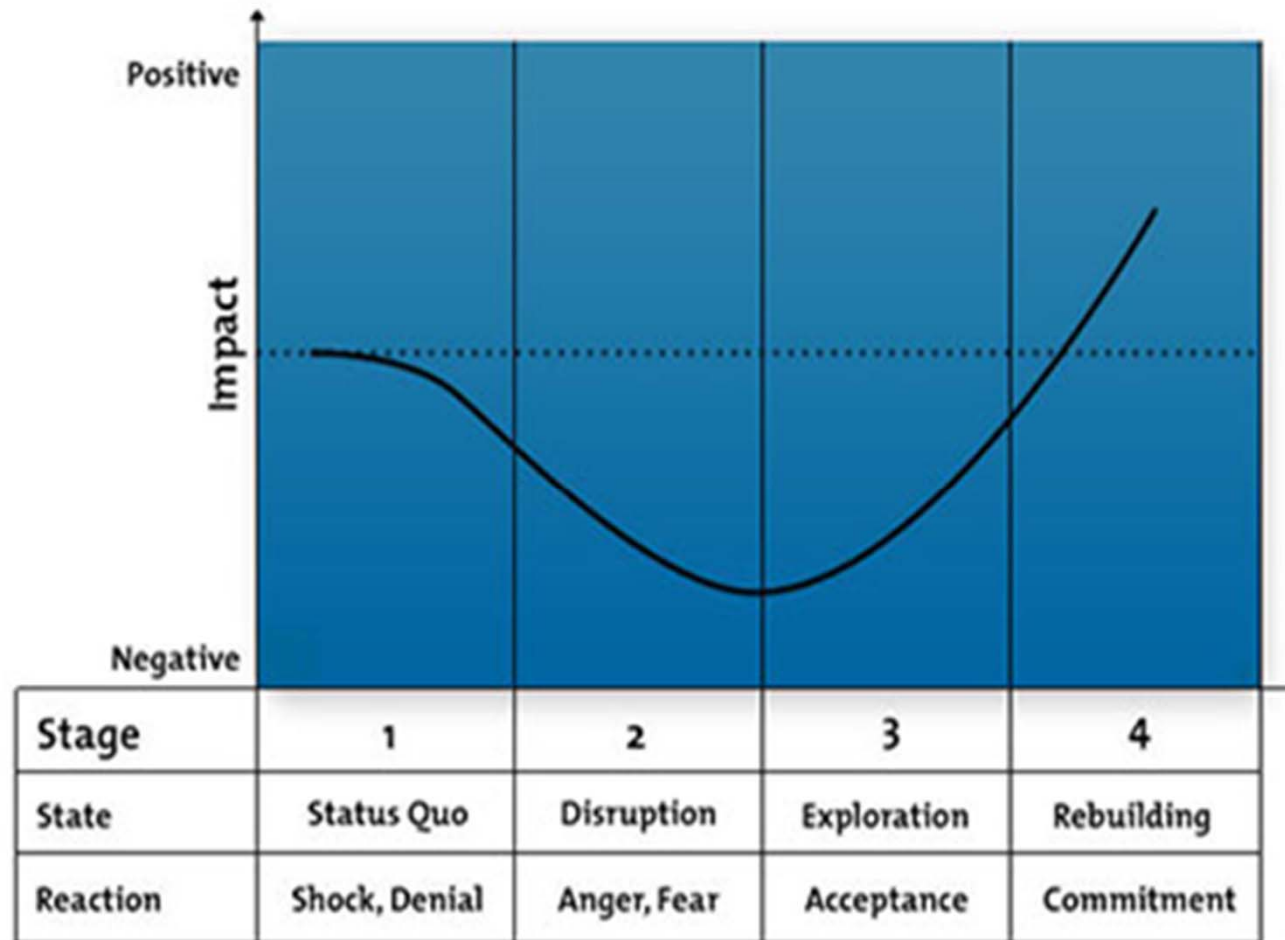
Send

# ANSWER THE POLL

- When you think of “Change Management,” what is your response?
  - I better start looking for a new job
  - Do we really need to change?
  - Oh good, someone is going to start managing this mess
  - Yay, change, let me know what to do



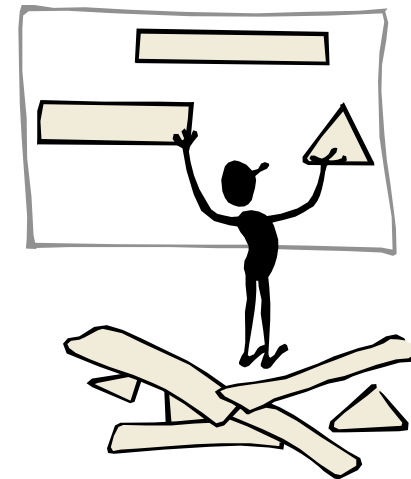
# THE CHANGE CURVE



# WHAT IS CHANGE MANAGEMENT?

“Change management is a **structured approach** for ensuring that changes are **thoroughly and smoothly implemented**, and that the **lasting benefits** of change are achieved.”

- [MindTools.com](http://MindTools.com)





# CHANGE MANAGEMENT



# CHANGE IN YOUR WORLD?

Testing Yield

Affordable Care Act

Treatment as Prevention

Community High Impact Prevention

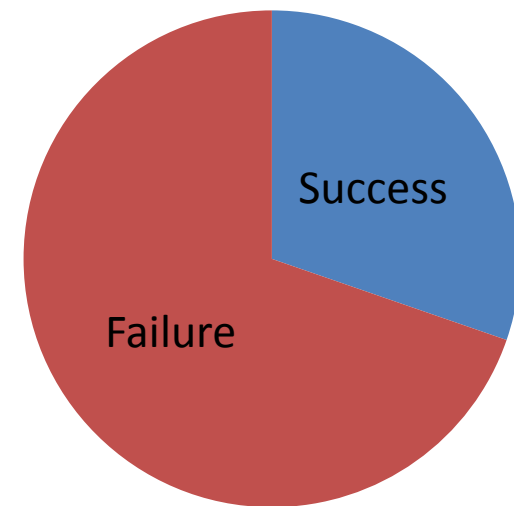
Outcome Evaluation

Funder Expectations

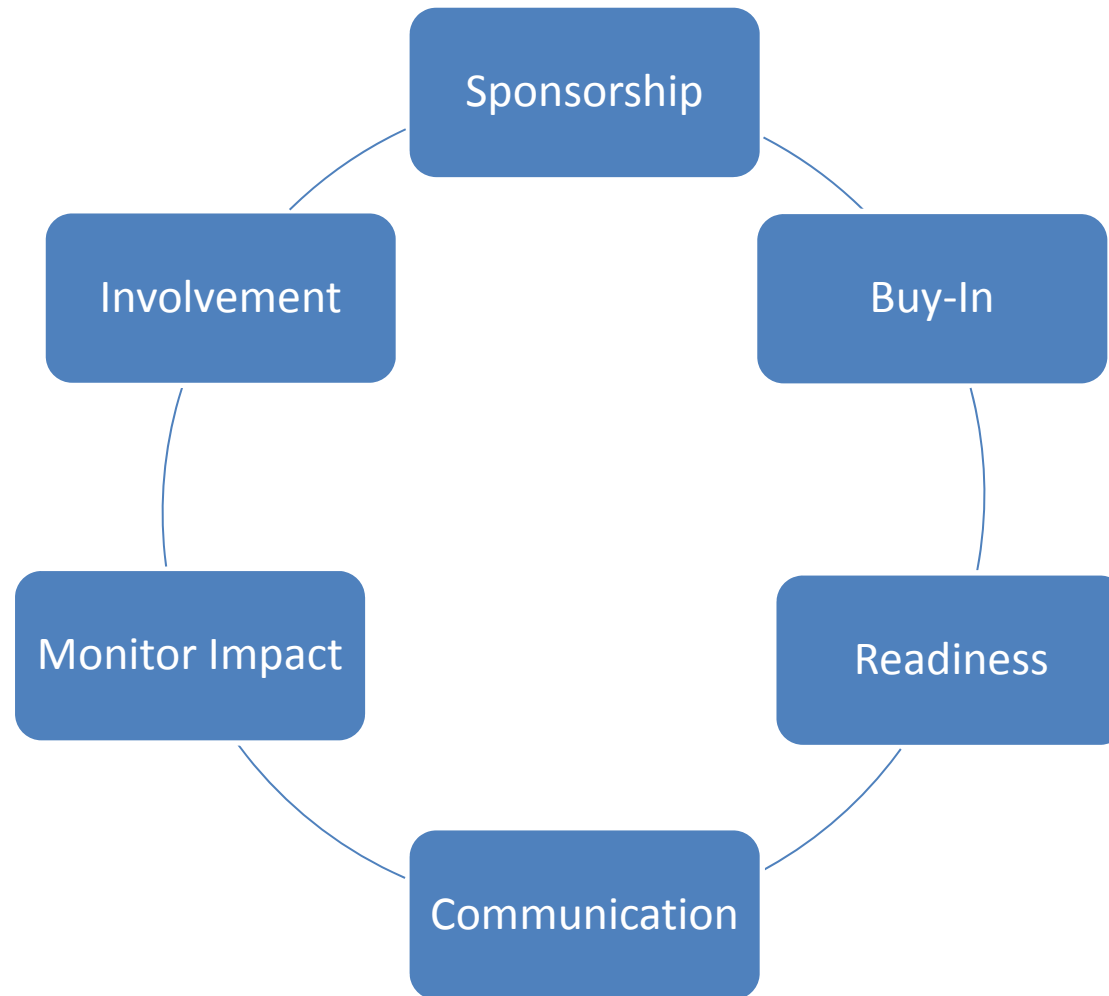


# WHY CHANGE NEEDS LEADERSHIP

- 70% of all major change efforts in organizations fail. (Dr. John Kotter)
- Why do they fail? Because organizations often do not take the holistic approach required to see the change through
- Example: HIT implementation



# CHANGE LEADERSHIP COMPONENTS

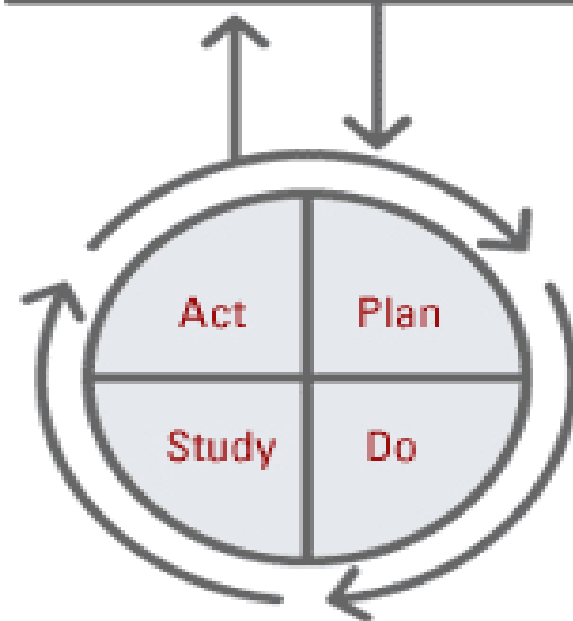


# THE MODEL OF IMPROVEMENT (IHI)

What are we trying to accomplish?

How will we know that a change is an improvement?

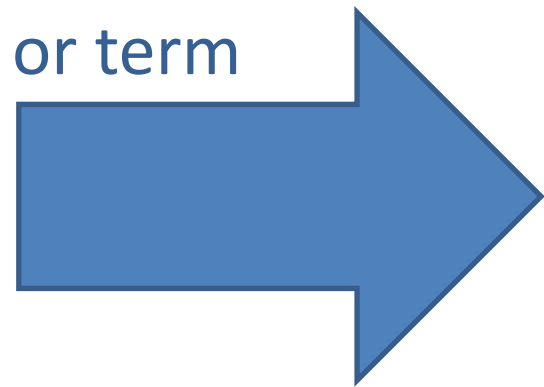
What changes can we make that will result in improvement?



# ANSWER THE POLL

How familiar are you with the PDSA framework for testing change?



- I use it all the time
- I have participated in a few PDSA cycles
- I have heard of PDSA but haven't used it
- I am not familiar with the process or term



# THREE QUESTIONS

- **Setting Aims:** What are we trying to accomplish?
- **Establishing Measures:** How will we know that a change is an improvement?
- **Selecting Changes:** What changes can we make that will result in improvement?

# REASONS TO TEST CHANGES ( $\Delta$ )

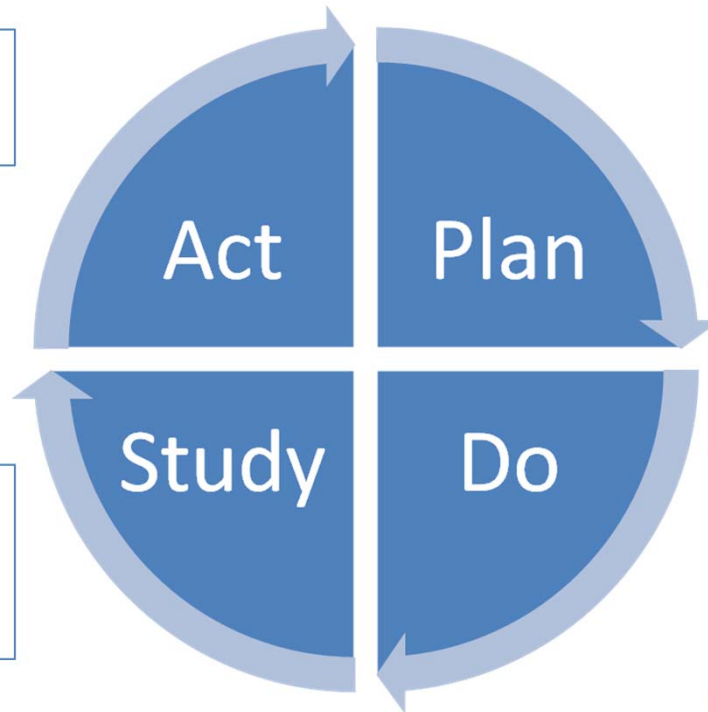
- To  $\uparrow$  belief that the  $\Delta$  will result in improvement
- To decide which of several proposed changes will lead to the desired improvement
- To  how much improvement can be expected from the  $\Delta$
- To decide whether the proposed  $\Delta$  will work in the actual environment of interest
- To decide which combinations of  $\Delta$ s will have the desired effects on the important measures of quality
- To  costs, social impact, and side effects from a proposed  $\Delta$
- To  $\downarrow$  (minimize) resistance upon implementation



# PDSA CYCLES

- What modifications need to be made?

- Analyze results and compare to predictions



- List the tasks needed to set up the test of change
- Predict what will happen

- Carry out the test
- Document what actually happened when you ran the test

# IMPLEMENTING THE CHANGE

Implement and  
spread the change  
accordingly



# CASE STUDY

- A CBO conducts testing, does counseling, and then refers HIV+ persons to the local community health center (CHC)
- CBO is interested in establishing a formal linkage to care process with the CHC

## CASE STUDY - THREE QUESTIONS

- **Setting Aims:** To link all clients that have an initial and verified HIV+ test result to care within two weeks of diagnosis.
- **Establishing Measures:** Client satisfaction, number of clients successfully linked to care, number of clients on ART, etc.
- **Selecting Changes:** Working with local CHC to establish a formal linkage to care program.



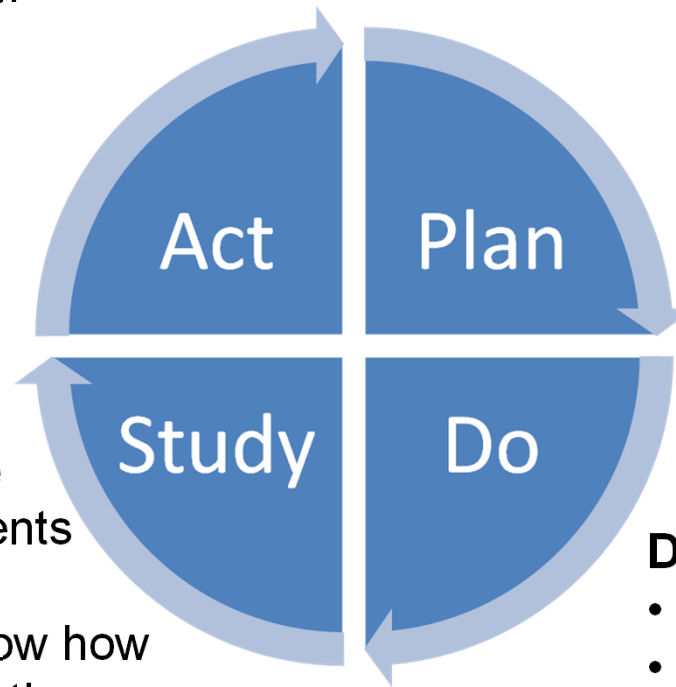
# CASE STUDY - PDSA CYCLE FOR ESTABLISHING A LINKAGE TO CARE PROGRAM WITH CHC

## Modifications made

- Established direct number to MA
- Gave card to client with appt. information
- Let client select PCP
- Made appt. reminder call

## Analyzed results

- CM was not able to make appt. right away for all clients
- One client needed to reschedule, but didn't know how
- Another client did not like the PCP they saw



## Who? When?

- 5 recently diagnosed HIV+ clients
- Next two weeks

## Where? What?

- Make first appt. for client at CHC

## Documented Problems

- Phone number busy
- 4 clients went to their first appt./1 missed it.
- Of these 4, 3 scheduled a second appt.

# TIPS FOR SUCCESSFUL CHANGE MANAGEMENT

- Think a couple of cycles ahead
- Scale down the size of the test
- Test with volunteers
- Do not try to get consensus, "buy-in," etc.
- Be innovative
- Don't reinvent the wheel
- Pick easy changes to try
- Collect useful data during each test
- Test over a wide range of conditions



# WRAP-UP

- Your observations
- Questions
- Complete evaluation using link below



<https://www.surveymonkey.com/s/68KMYCM>

# RESOURCES

- Mind Tools: <http://www.mindtools.com/>
- The Improvement Model (PDSA framework):  
<http://www.ihl.org/knowledge/Pages/HowtoImprove/default.aspx>
- JSI CBA: [cba.jsi.com](http://cba.jsi.com)







# THANK YOU FOR YOUR TIME & PARTICIPATION!

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