AHA Team Training

How to Use Human-Centered Design to Inspire and Focus Teams

February 8, 2023

American Hospital Association™
Advancing Health in America

AHA CENTER FOR HEALTH INNOVATION

Rules of Engagement

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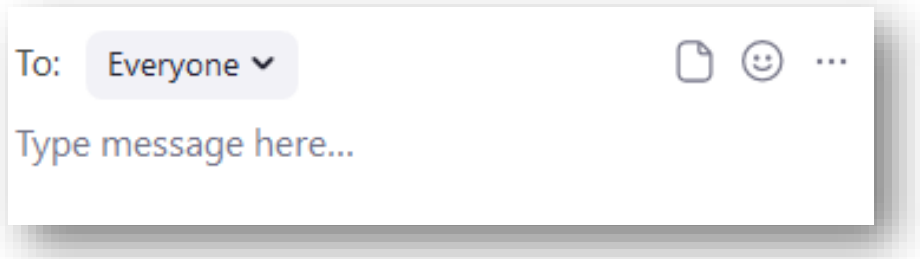

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Continuing Education Credit

To receive 1.0 CE credit hour for this webinar, you must:

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In support of improving patient care, the Duke University Health System Department of Clinical Education and Professional Development is accredited by the American Nurses Credentialing Center (ANCC), the Accreditation Council for Pharmacy Education (ACPE), and the Accreditation Council for Continuing Medical Education (ACCME), to provide continuing education for the health care team.

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Upcoming Team Training Events

Courses & Workshops

In-person TeamSTEPPS Master Training Courses

- April 10-11 at Northwell (New Hyde Park, NY)
- April 27-28 at UCLA (Los Angeles, CA)
- May 9-10 at Tulane (New Orleans, LA)
- May 24-25 at Houston Methodist (Houston, TX)
- June 21-22 at MetroHealth (Cleveland, OH)

Custom TeamSTEPPS Advisory Services at Your Organization

- 2-day TeamSTEPPS Master Training Courses
- Comprehensive TeamSTEPPS Programs
- Learn more

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Upcoming Team Training Events (continued)

Webinars

Three-part webinar series on human centered design in health care:

- Applying Human-Centered Design to Health Care – January 11 ✓
- How to Use Human-Centered Design to Inspire and Focus Teams – February 8 ✓
- What's Your Story? How to Craft Narratives Using Human-Centered Design that Inspire Your Audience – March 8

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Matthew Kelly

Partner & Business Designer, do tank

Adam Kohlrus

Partner & Business Designer, do tank

OUR GOAL

OVER THE COURSE OF THE NEXT 50 MINUTES, WE WILL SHARE TOOLS, METHODS, AND CASE STUDIES THAT WILL HELP YOU FOCUS AND INSPIRE YOUR TEAM.

WE WILL RAPIDLY BOUNCE BETWEEN EXAMPLES

WE WILL SHOWCASE TOOLS/TECHNIQUES YOU CAN USE

MAKE USE OF CHAT FOR REACTIONS

CLIMATE

If any field should be human-centered, it’s healthcare. We help teams at the intersection of quality, equity, and innovation design a safer, healthier future.

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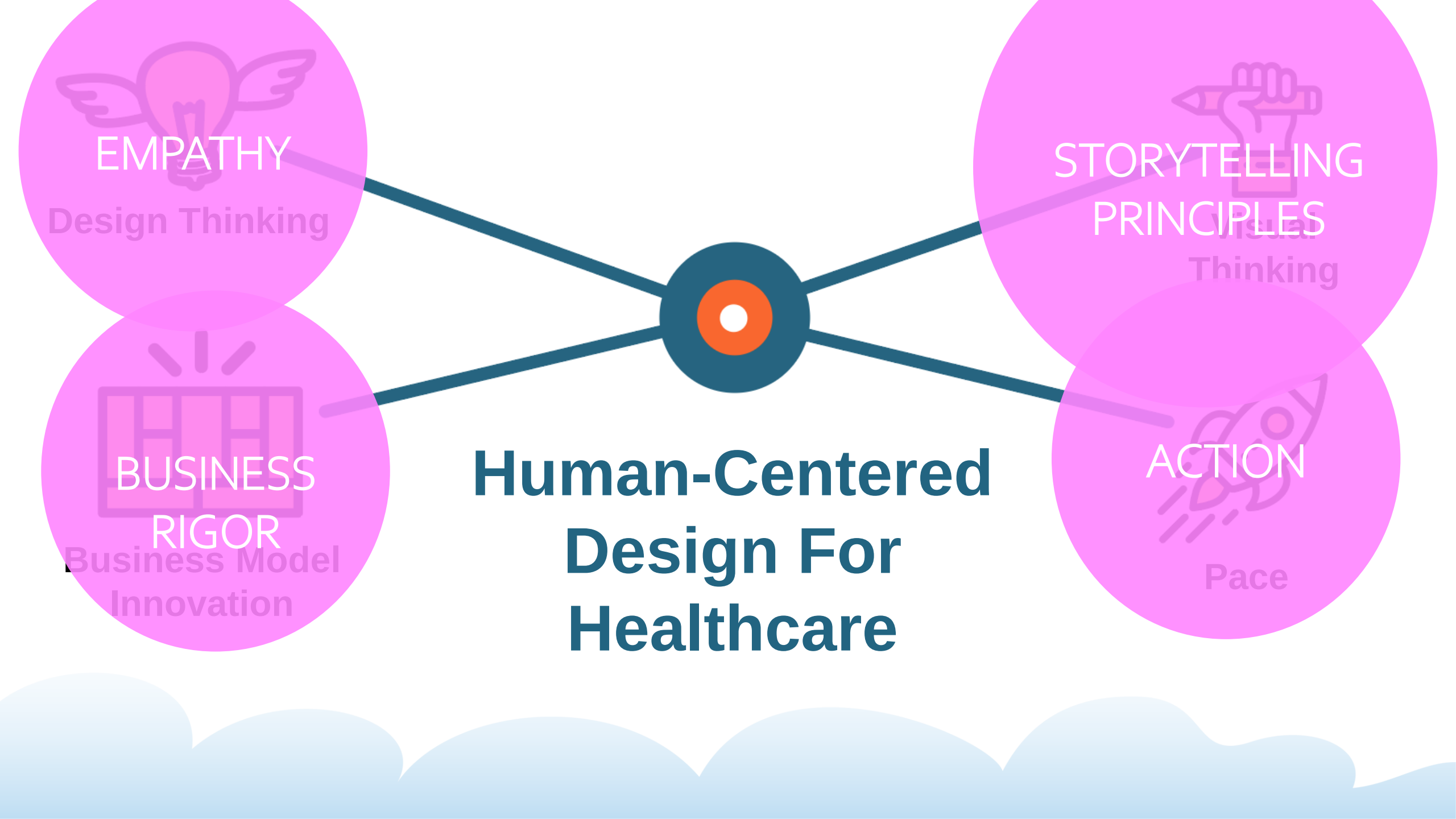

EMPATHY
Design Thinking
STORYTELLING PRINCIPLES
Visual Thinking
BUSINESS RIGOR
Business Model Innovation
ACTION
Pace
Human-Centered Design For Healthcare

Applying Human-Centered Design

- Strategic Innovation
- Digital Strategy
- Clinician Engagement
- Diversity and Health Equity
- Clinical Outcomes
- Community Based Partnerships
- Quality Improvement
- High Reliability Organizations
- Emerging Critical Challenges

Where can Innovation emerge in your Health Care Organization?

SOLO MOMENT

REFLECT ON A TEAM THAT ARE A PART OF – WHAT ARE YOUR COLLECTIVE GOALS AND WHAT ARE THE CHALLENGES THAT YOU FACE?

AGENDA

1. Empathy and Creative Collaboration

2. Team Vision and Alignment

3. Focus and Inspiration: A Case Study

Empathy and Creative Collaboration

The Target Audiences

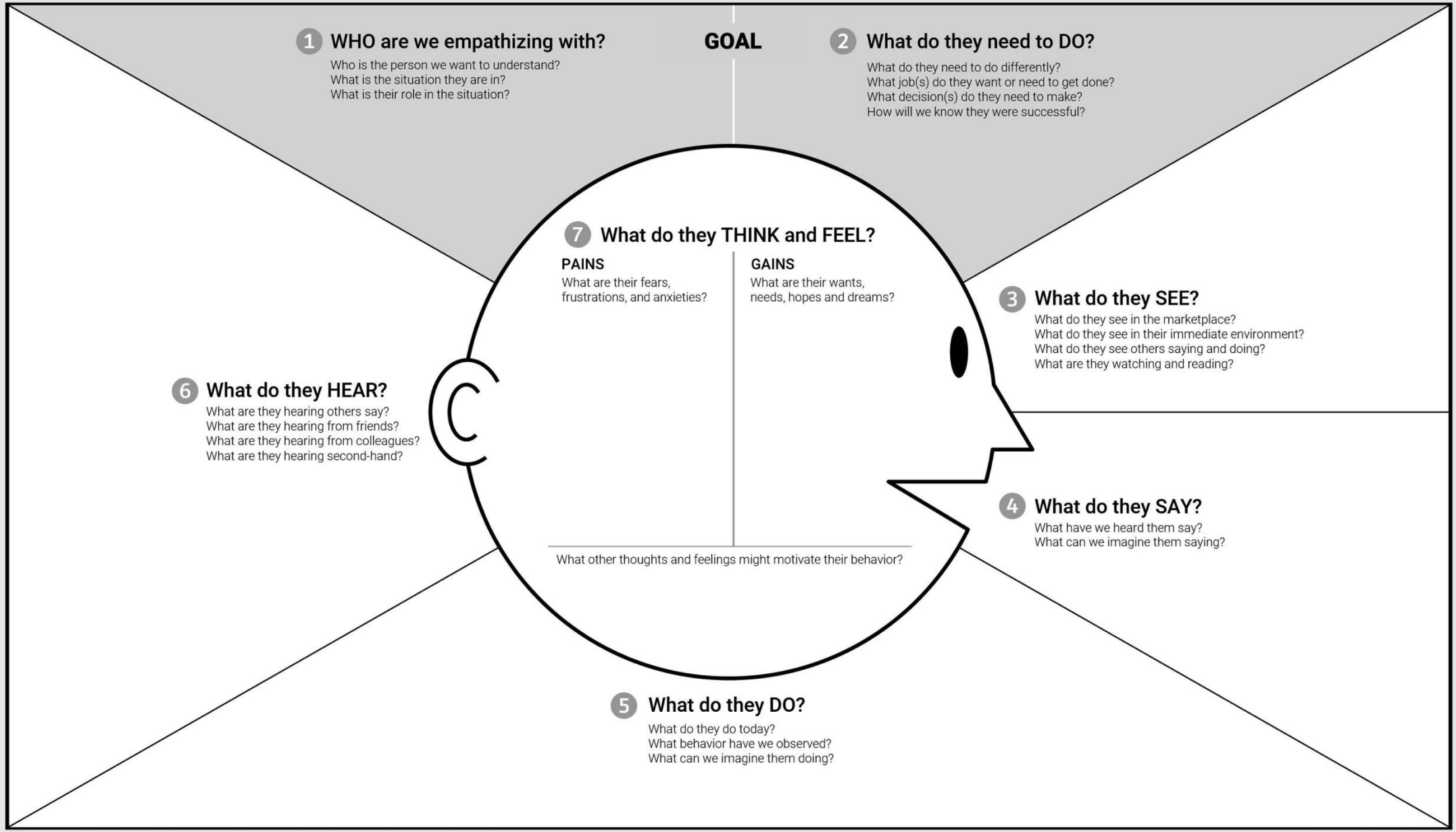
Internal Teams and Partnerships

The Challenge

Mutual Understanding, Leveraging Our Superpowers, Bringing Joy

Empathy Map Canvas

Designed for:	Designed by:	Date:	Version:



Last updated on 16 July 2017. Download a copy of this canvas at http://gamestorming.com/empathy-map/

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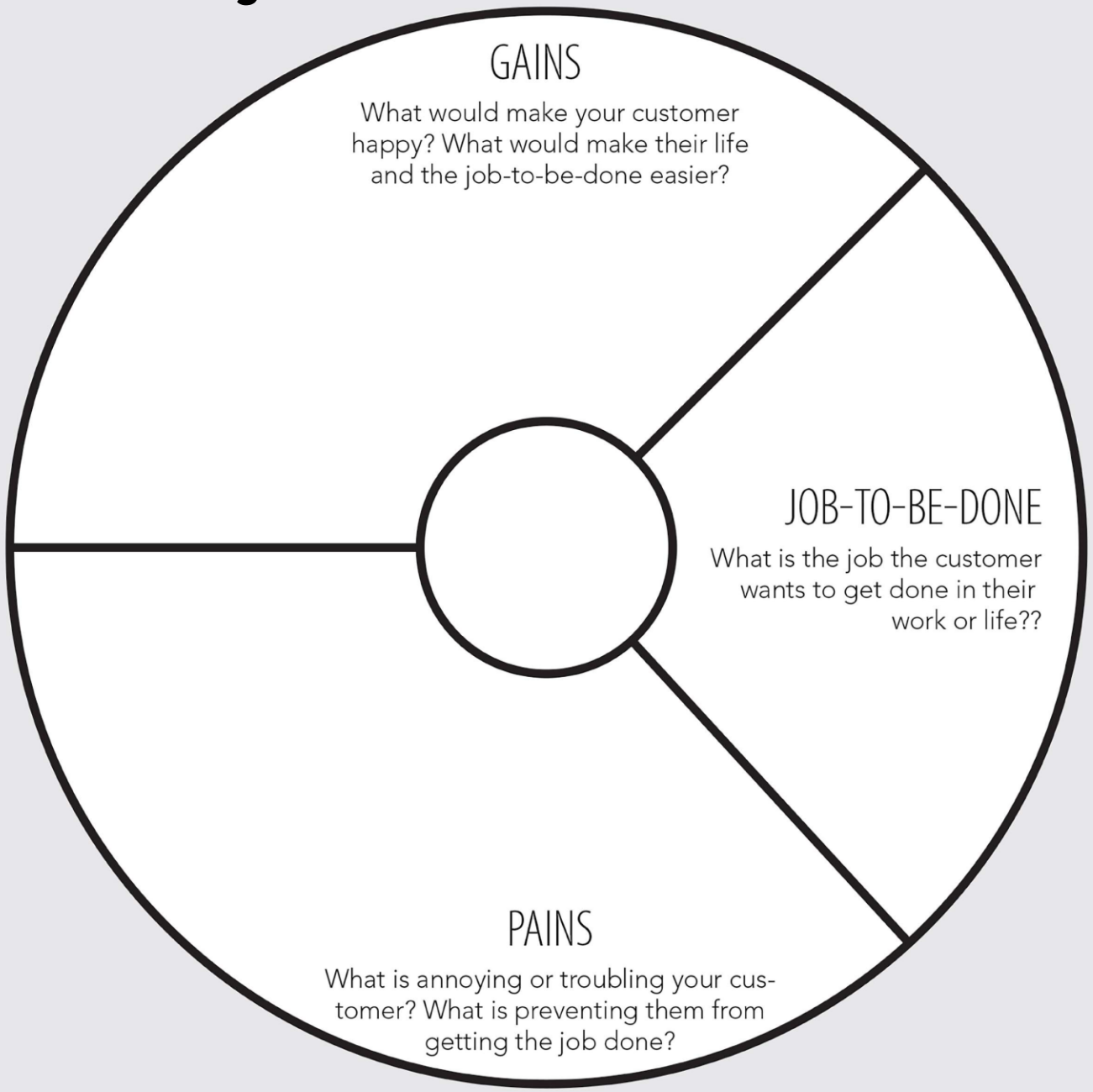
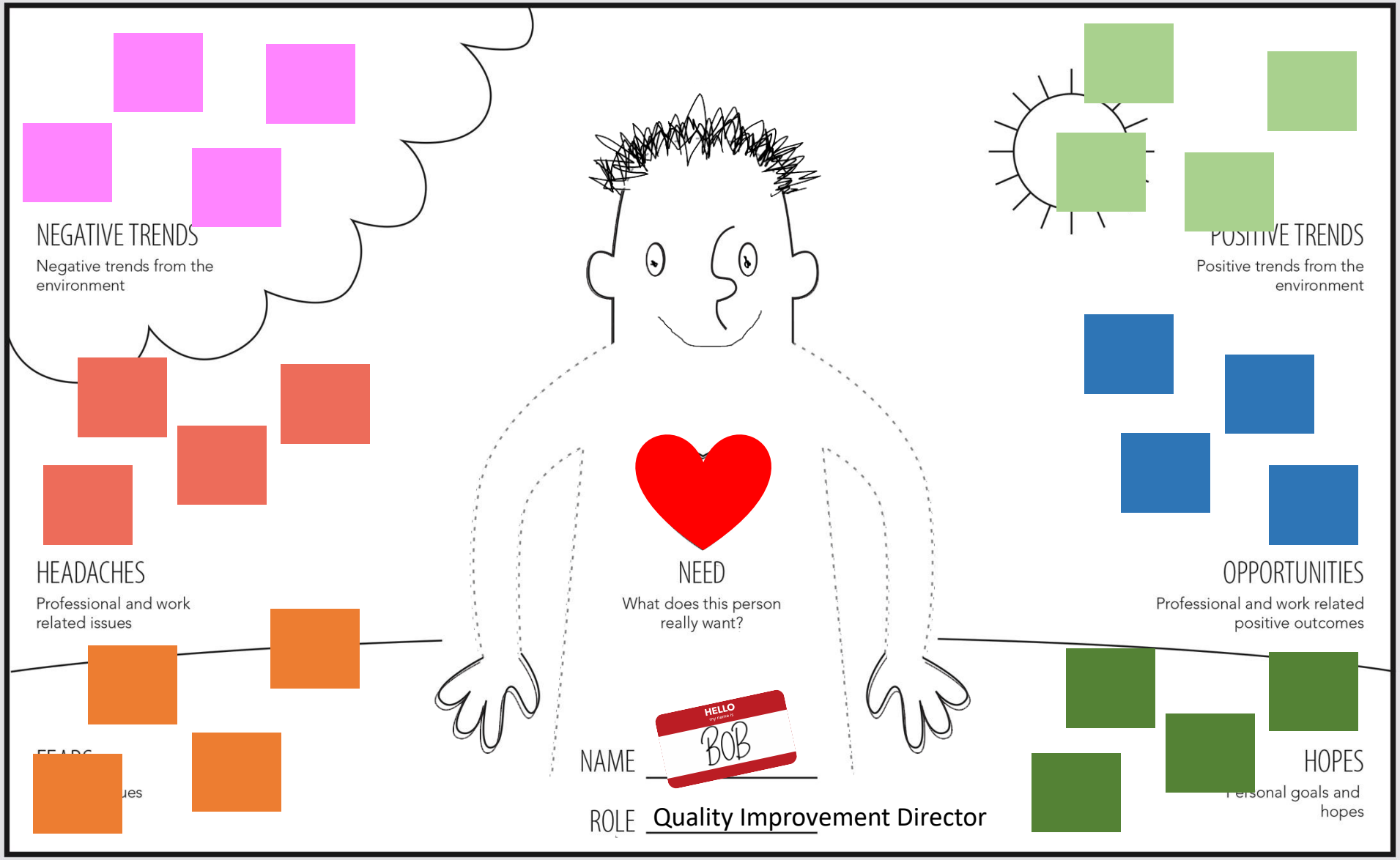
Customer Segment



Value Proposition Canvas

PERSONA CANVAS

DESIGN A BETTER BUSINESS



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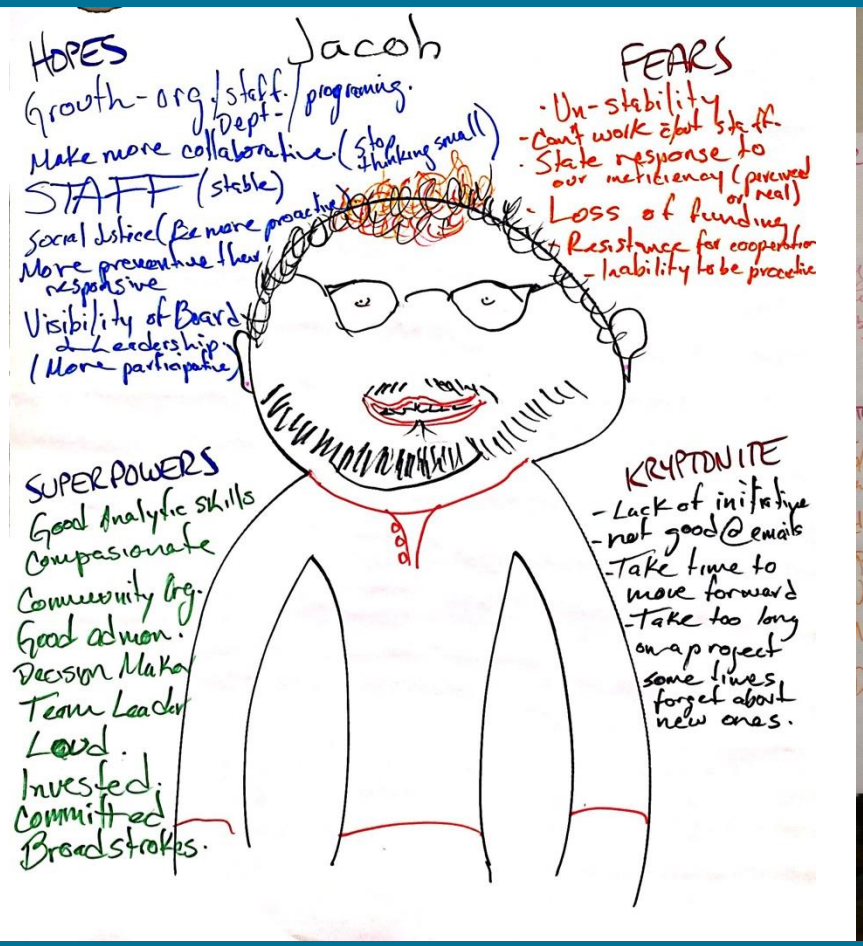

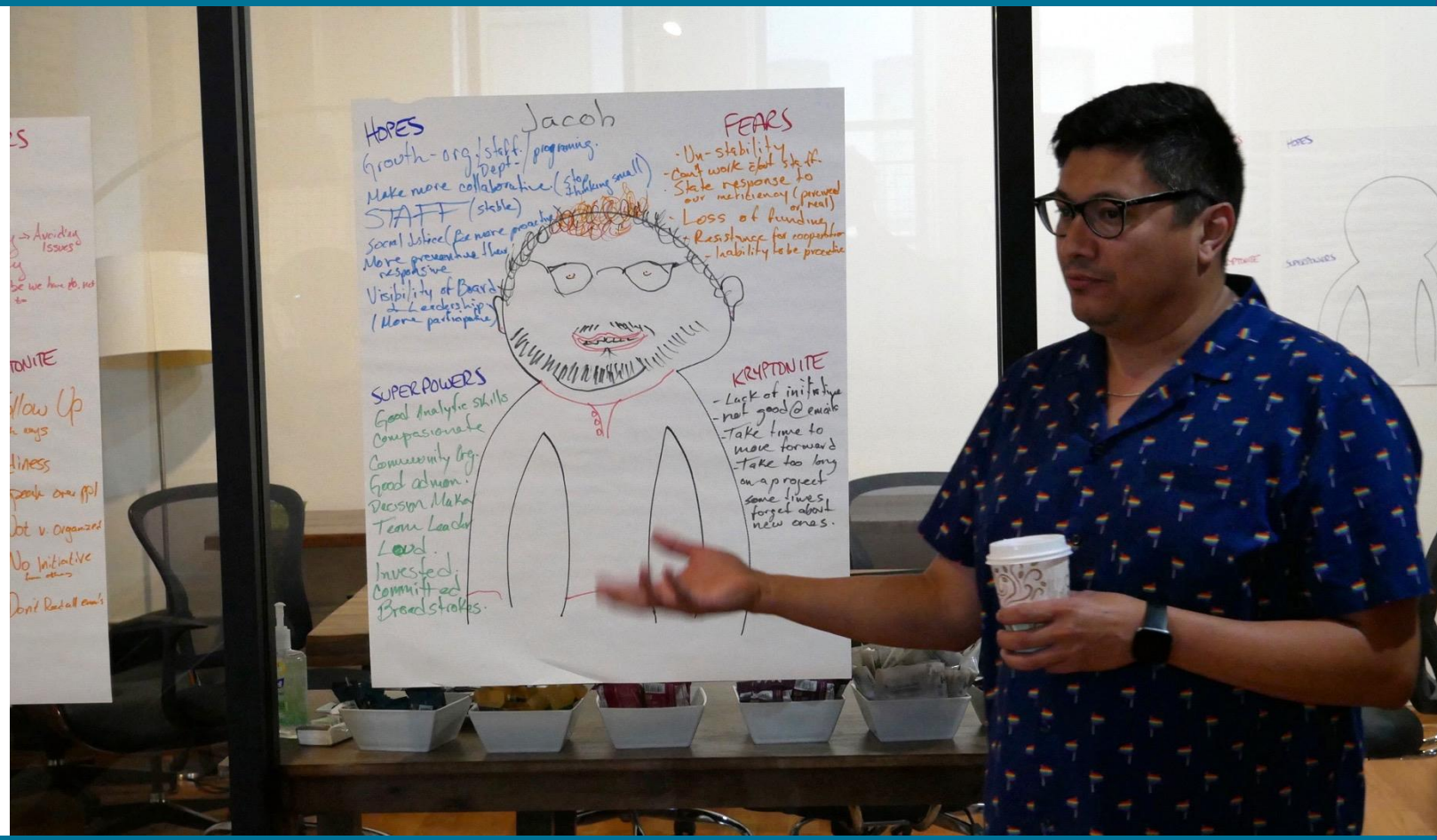

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Empathy Maps are an amazing management tool – they can help you really understand what people are thinking and feeling

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Business design, redesigned.

Empathy Maps can be a creative and fun tool for ‘focus group’ sessions

Empathy Maps are very useful when preparing for important presentations

Team Vision & Alignment

The Target Audiences

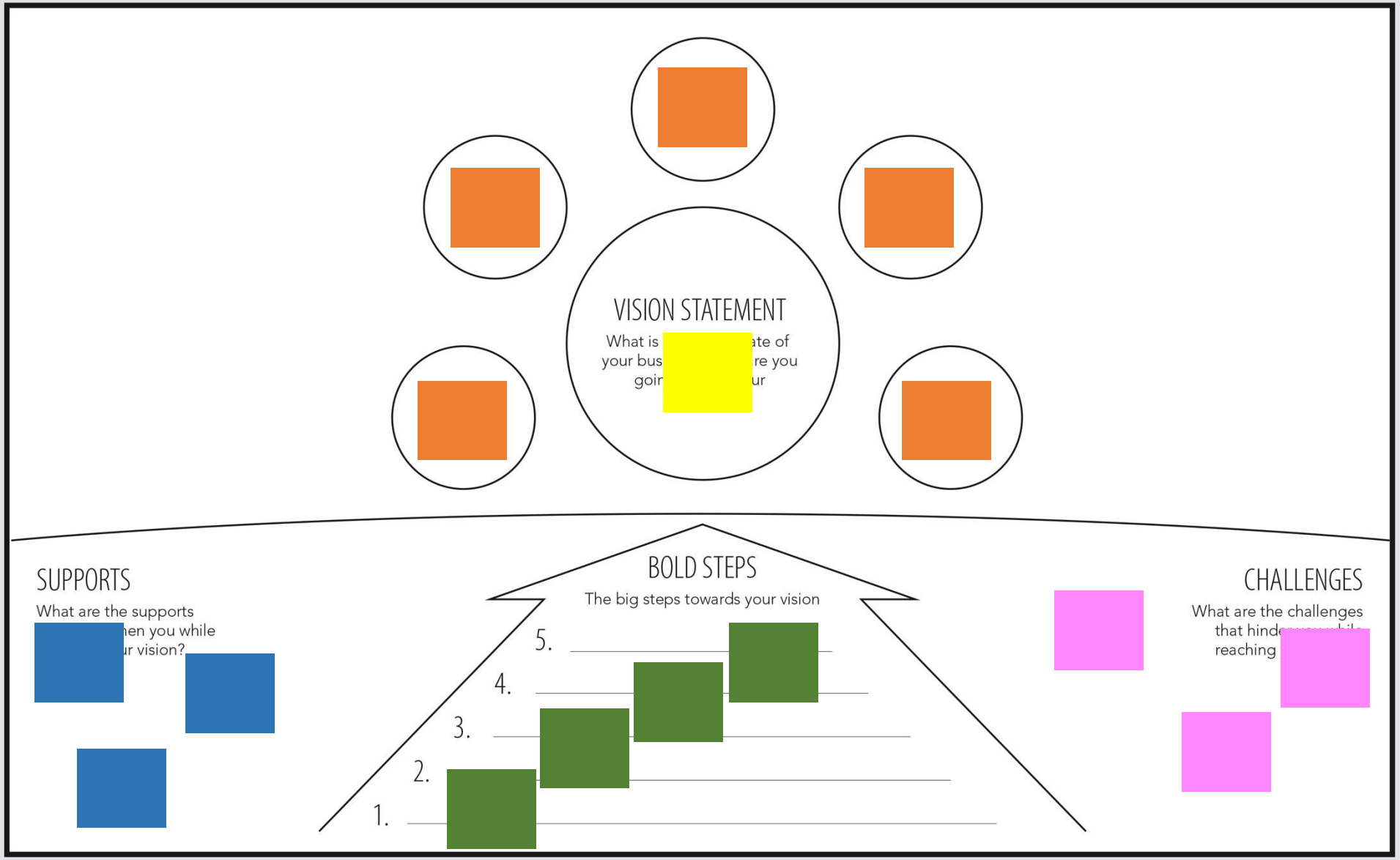
Internal Teams and Partnerships

The Challenge

Focused, Efficient, and Energetic Collaboration

5 BOLD STEPS VISION® CANVAS

DESIGN A BETTER BUSINESS



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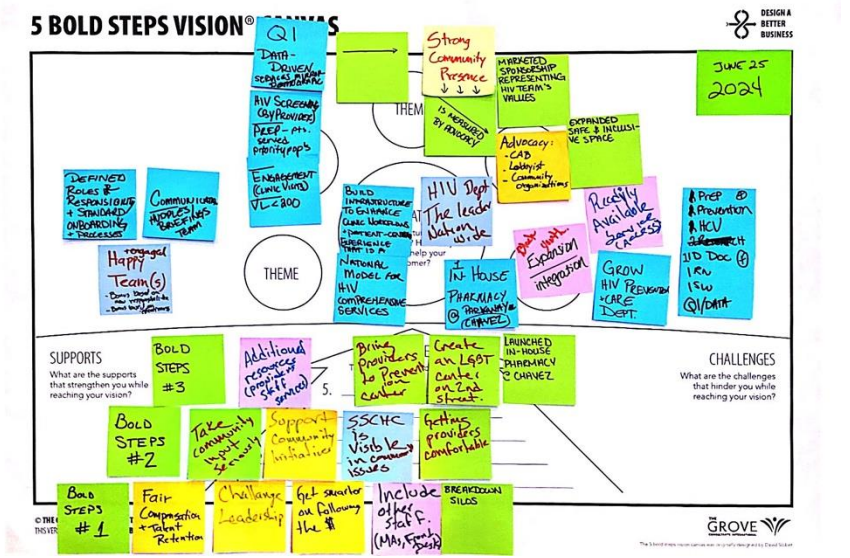
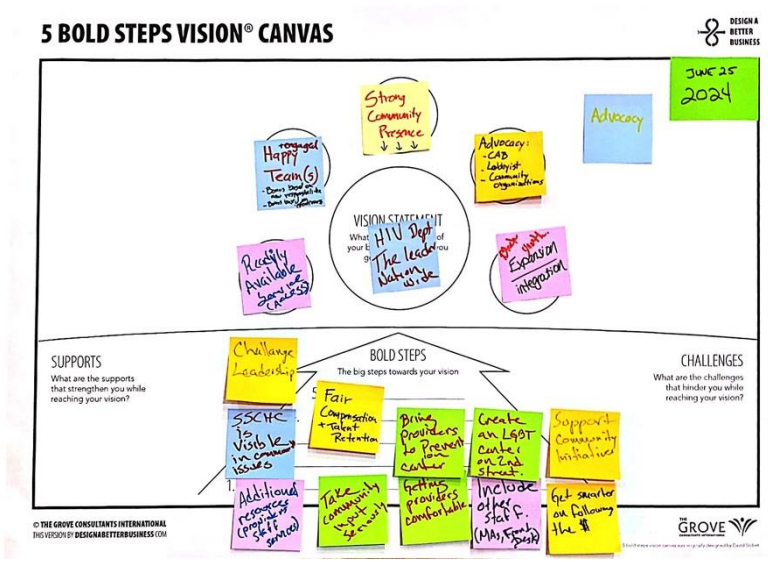
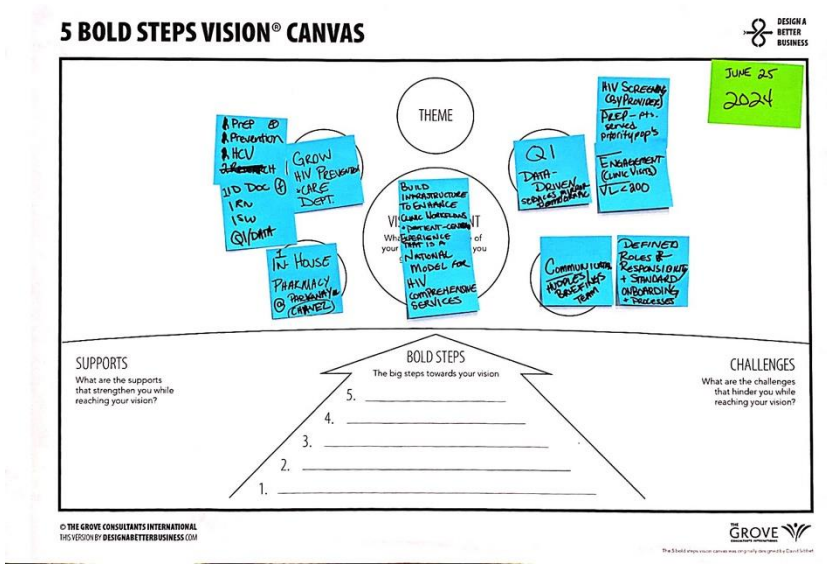
The 5 bold steps vision canvas was originally designed by David Sibbet







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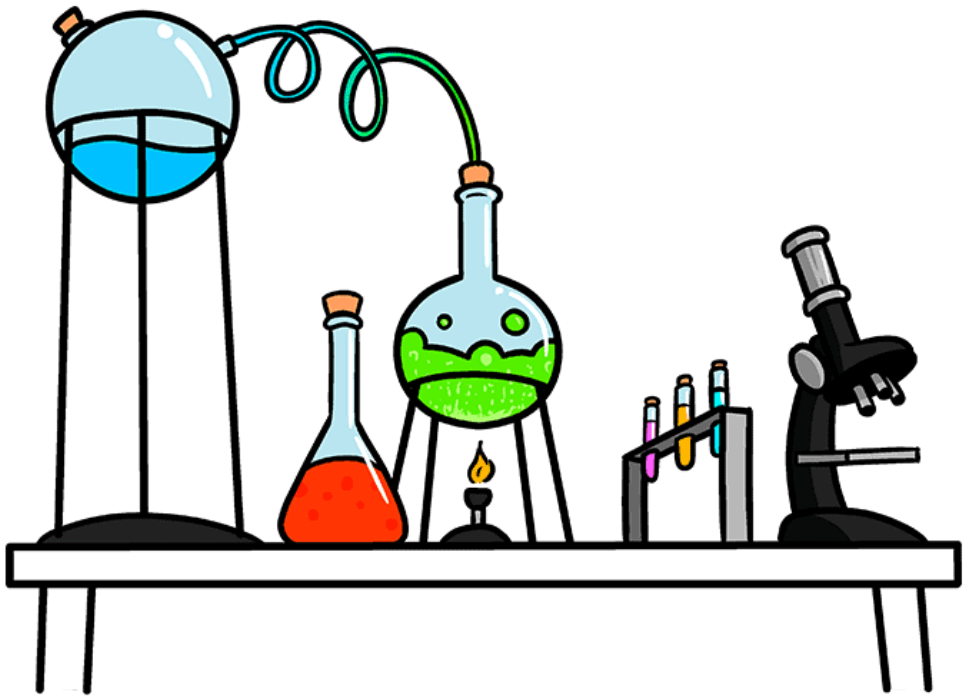

Test your vision the same way you would a new product or service

If you are doing this at scale, segment your audience and give them different roles

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Business design, redesigned.

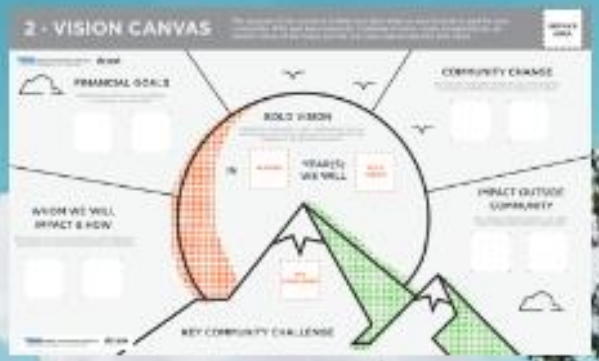
Use shared, team vision to inspire individual goals (KPI, OKR, etc.)

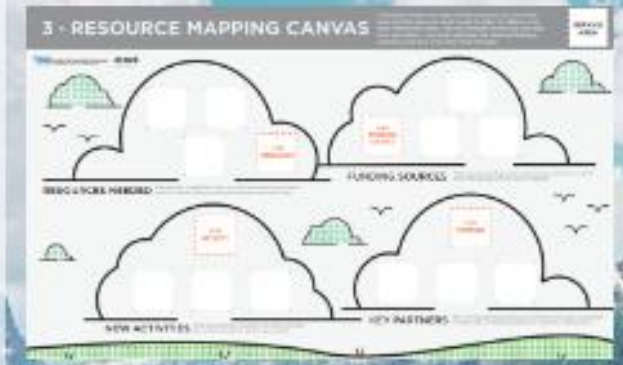
Visioning and Strategic Planning for Community Based Partnerships

Healthy Communities Strategy Canvases

This set of five tools will help you organize your thinking, align your team, and design powerful strategies for improving health in your community. In the course of completing this design journey, you will explore the challenges that face community members, the broader context in which everyone is living, the vision that will guide your work, the resources that will be required, and the critical action steps necessary to advance.

Learn More





EMPATHY MAP WARM-UP CANVAS

Empathy Mapping allows you to zoom in to your community at a persona or person level. The goal is to try and understand what is truly important for these people, so their perspective is included in your community plan. When using the Empathy Map, it's about finding the balance between facts and assumptions.

SERVICE AREA

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DREAMS

What does this person strive for in the long term?
What would make them happy and fulfilled?

HEADACHES

List the obstacles and frustrations facing this person. What gets in their way and causes them stress? What keeps them awake at night?

JOBS TO BE DONE

What are this person's day-to-day objectives in life, the things they want and need to get done? This can include tasks that are professional, social, emotional, spiritual, educational, etc.

HOW WILL WE MAKE AN EQUITABLE PLAN WITH THIS PERSONA?

What assumptions have you made about this person, and how will you validate them?
How can you include this person and their perspective in your community planning?

1 · COMMUNITY CONTEXT CANVAS

Before developing a plan for the future, it is important to identify external factors that impact your community, its residents, and the challenges they face. What you discuss in this exercise will underpin the community plan you will develop.

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POLITICAL, ECONOMIC, REGULATORY FACTORS

TOP FACTOR

What factors or trends in the political, economic, and regulatory environment affect your community?

DEMOGRAPHIC FACTORS

TOP FACTOR

Consider relevant data on demographics, education, employment, etc. in your community.

KEY CHALLENGE

KEY COMMUNITY CHALLENGE

- ☐ ECONOMIC STABILITY
- ☐ NEIGHBORHOOD & BUILT ENVIRONMENT
- ☐ SOCIAL & COMMUNITY CONTEXT
- ☐ EDUCATION
- ☐ HEALTH & HEALTH CARE

UNCERTAINTIES

TOP FACTOR

What could have a big impact on your community, but it's unclear how or when?

TECHNOLOGY FACTORS

TOP FACTOR

What technological factors or trends affect your community and the key challenge?

2 · VISION CANVAS

The purpose of this canvas is to help your team align on your long-term goal for your community. With your key community challenge in mind, create an aspirational, yet realistic vision of the future and the outcomes associated with that vision.

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FINANCIAL GOALS

What financial metrics must you achieve to make your vision a reality?

COMMUNITY CHANGE

How will your community change at social, environmental, economic, and health levels as you pursue your vision?

BOLD VISION

A bold vision statement is a clear headline about how you will help your community, with regard to the selected key challenge, in the defined time period.

IN NUMBER YEAR(S) WE WILL BOLD VISION

WHOM WE WILL IMPACT & HOW

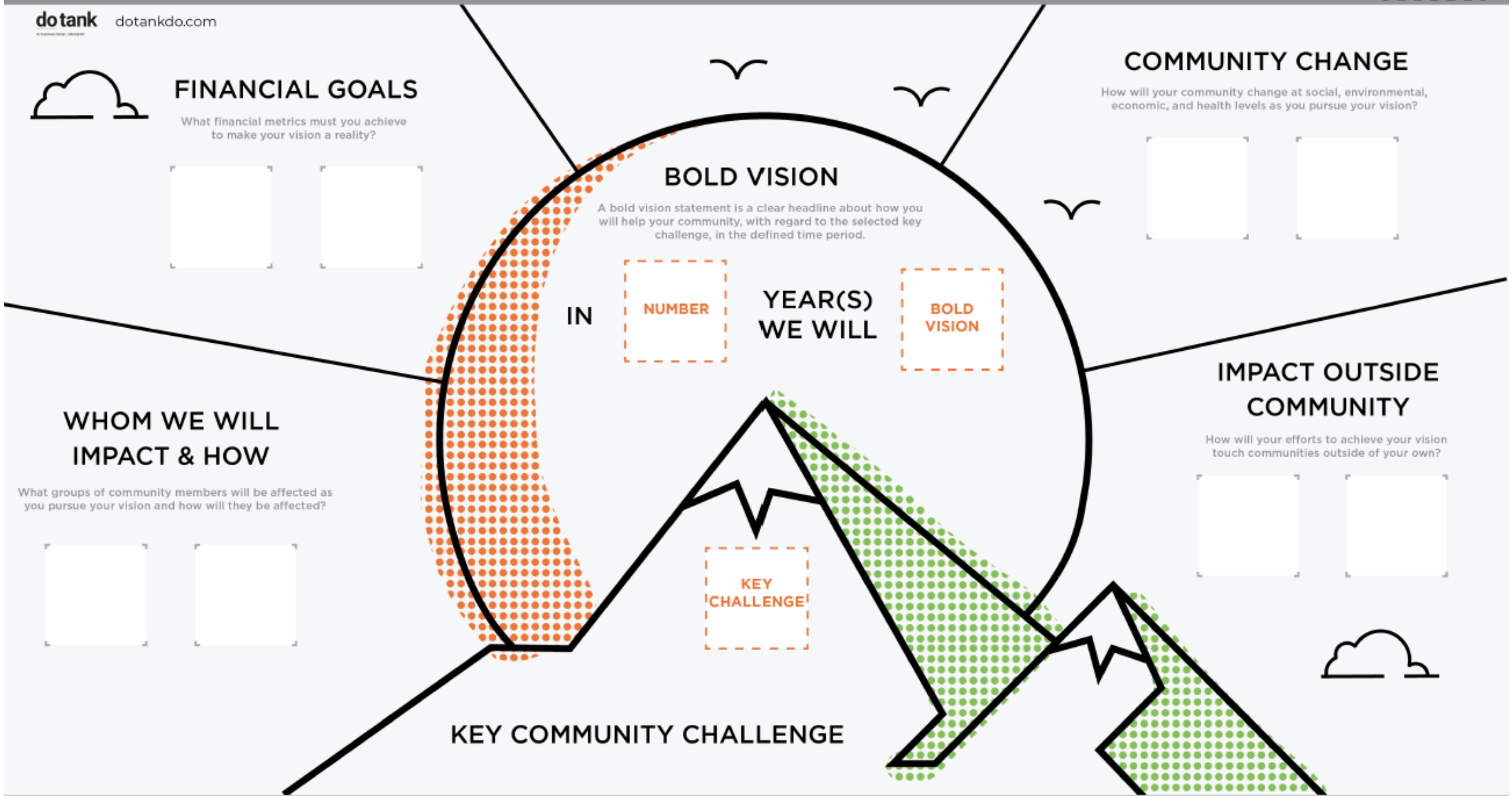
What groups of community members will be affected as you pursue your vision and how will they be affected?

IMPACT OUTSIDE COMMUNITY

How will your efforts to achieve your vision touch communities outside of your own?

KEY CHALLENGE

KEY COMMUNITY CHALLENGE



3 · RESOURCE MAPPING CANVAS

This canvas helps you map out the resources you currently have and the ones you need to get in order to achieve your bold community vision. You will consider more than just who is on your team – you must also have the financial backing, expertise, and buy-in to make bold changes.

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TOP RESOURCE

RESOURCES NEEDED

What people, capabilities, tools, etc. will you need to pursue your vision? Consider what you have and what you will need to get.

TOP FUNDING SOURCE

FUNDING SOURCES

What types of funding do you expect are needed for your plan? What new sources will you have to acquire?

TOP ACTIVITY

NEW ACTIVITIES

What new programs, research, and other activities do you have to start to achieve your vision?

TOP PARTNER

KEY PARTNERS

Who are the important partners you need for your plans to succeed? Consider who can help you get buy-in, expertise, and resources.

4 · STRATEGIC GAMEPLAN CANVAS

Based on the vision you have defined and the resources you need to gather, what work needs to get done in the next three months? These are your first steps toward making your community vision a reality.

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MONTH 1

What needs to get done and who needs to be on the team during the first month of work toward your vision?

WHO'S INVOLVED

WHO'S INVOLVED

M1 TASK

M1 TASK

M1 TASK

M1 TASK

MONTH 2

What needs to get done and who needs to be on the team during the second month of work toward your vision?

WHO'S INVOLVED

WHO'S INVOLVED

M2 TASK

M2 TASK

M2 TASK

M2 TASK

MONTH 3

What needs to get done and who needs to be on the team during the third month of work toward your vision?

WHO'S INVOLVED

WHO'S INVOLVED

M3 TASK

M3 TASK

M3 TASK

M3 TASK

MILESTONE

THREE-MONTH MILESTONE

In three months, where do you want to be on your journey to your community's bold vision? What will indicate it has been a successful three months?

BUT…partnership chartering is missing from this and is necessary for a healthy partnership

Focus and Inspiration: A Case Study

The Target Audiences

Leaders and Clinicians

The Challenge

Embedding High Reliability Principles into our Work Using Human-Centered Design

High Reliability Organizations

- Applying tried and tested principles of high reliability to align teams on a process to minimize harm

- A case study example of how human centered design tools can help translate theory into focused improvement work

HRO Observations

It took two+ years to create a level of comfort where
conversations can be truly open and candid.

- A skill set that can facilitate open conversation is imperative.

- Leadership commitment and involvement is imperative
  - Top-down approach
  - Need to Incorporate Bottom-up

- An Executive Team Assessment and Action Planning process were ***both*** needed to ensure focused action took place.

- Common theme among teams –

Our HRO Process

Illinois Health and Hospital Association

ICAHN Illinois Critical Access Hospital Network

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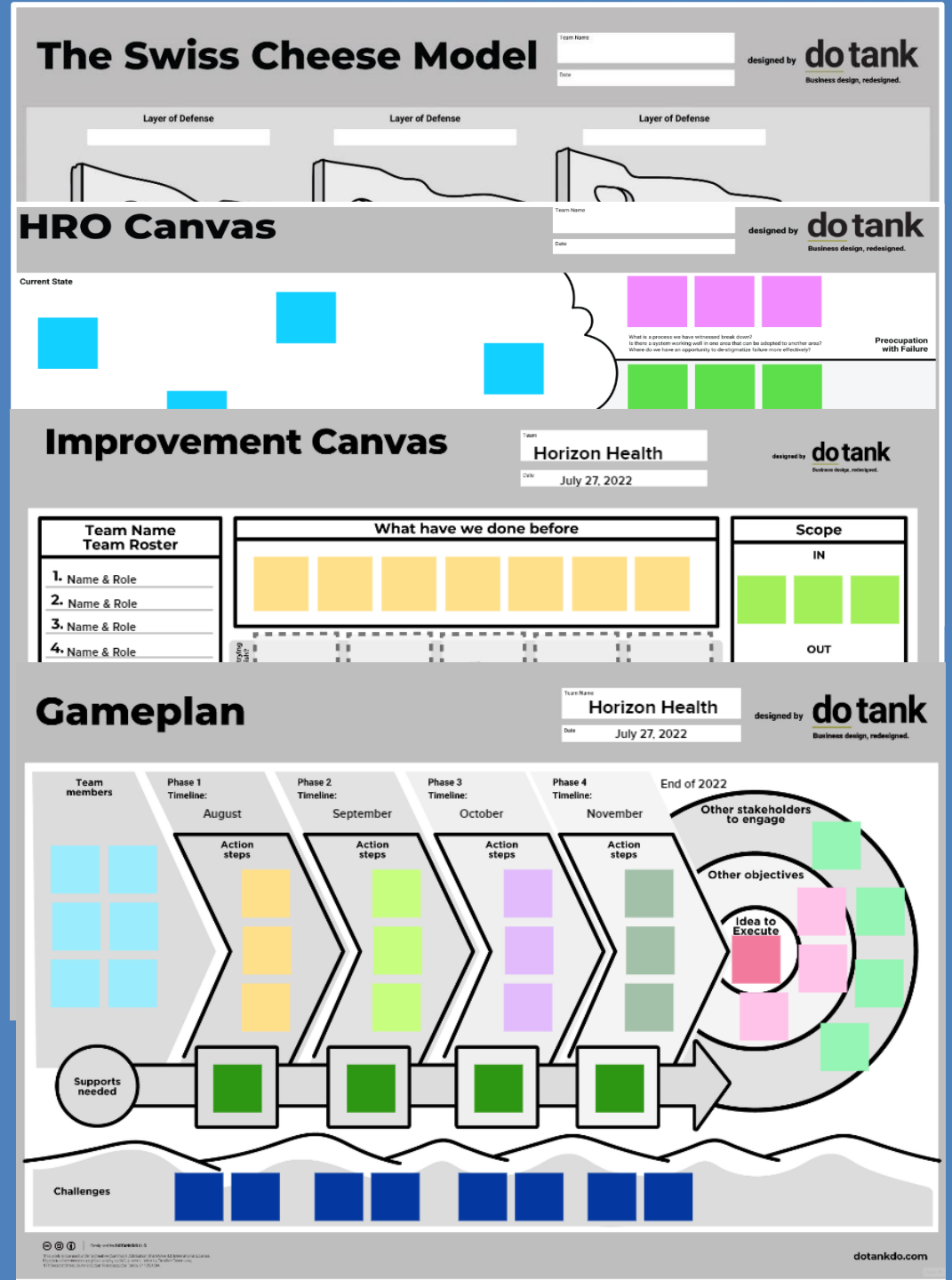
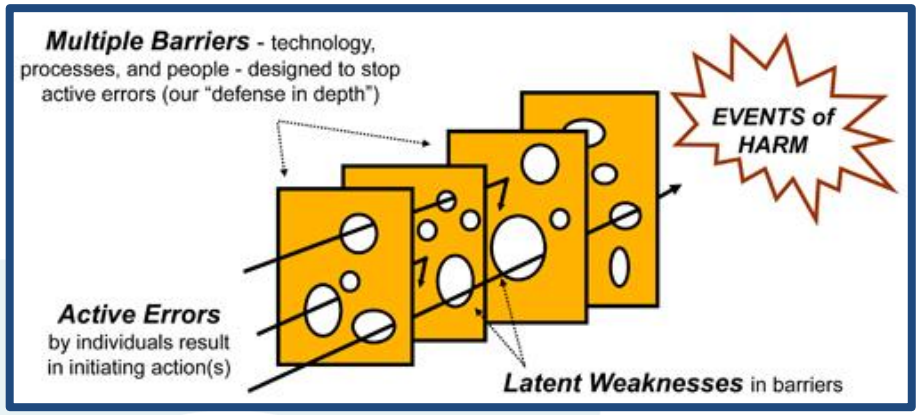
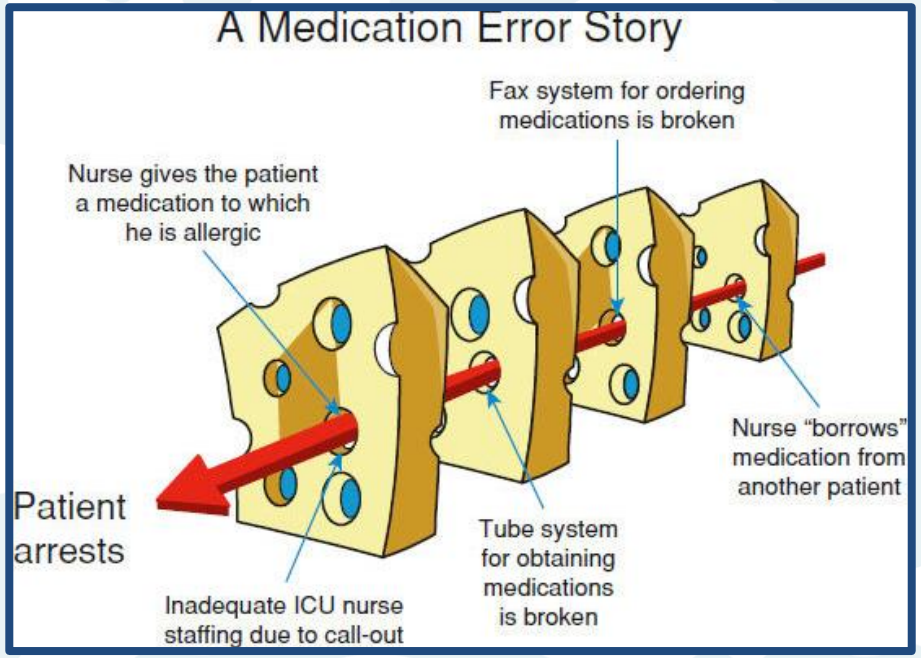
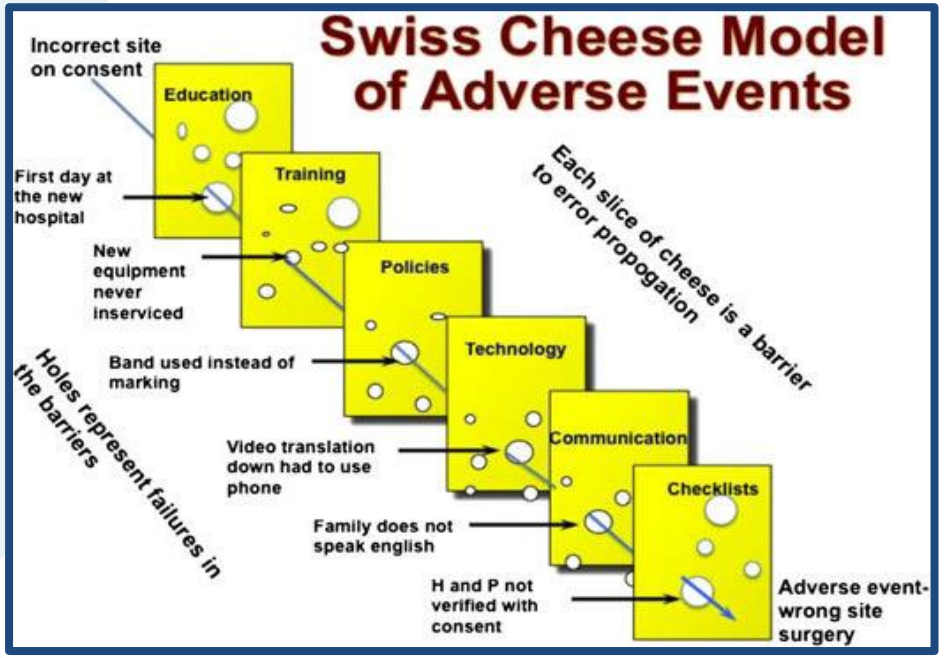
1. **Identify a "Systems Issue"**
2. **Call out the factors contributing to that issue**
3. **Apply the principles of HROs to those factors:**
    1. **Sensitivity to Operations**
    2. **Commitment to Resilience**
    3. **Deference to Expertise**
    4. **Reluctance to Simplify**
    5. **Preoccupation with Failure**
4. **Take your systems level issue identified and apply an HRO Quality Improvement Lens**
5. **Create a Gameplan of activities to move this work forward**



Adapting Healthcare Practice Through Human Centered Design





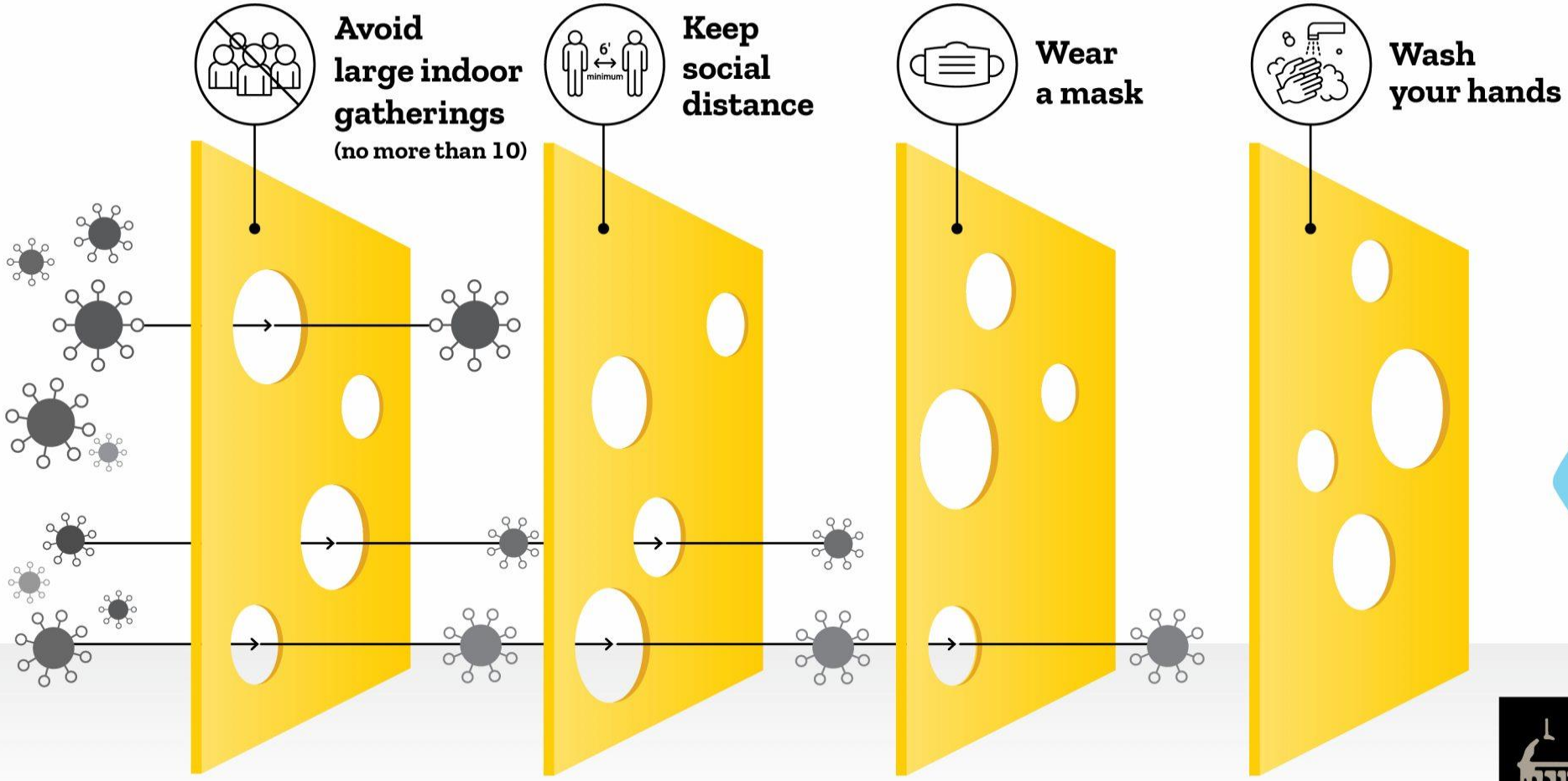


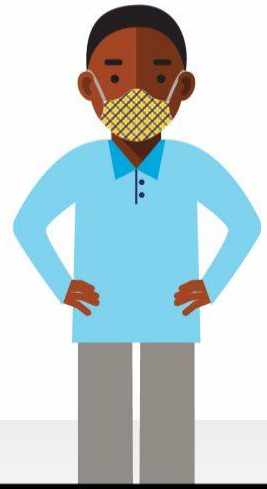
HOW TO STOP COVID-19:

THE SWISS CHEESE MODEL

The more steps you take,
the safer you are against COVID-19.

→ uihc.org/covid-toolkit





UNIVERSITY OF IOWA HEALTH CARE

The Swiss Cheese Model

Team N

Date July 6, 2022

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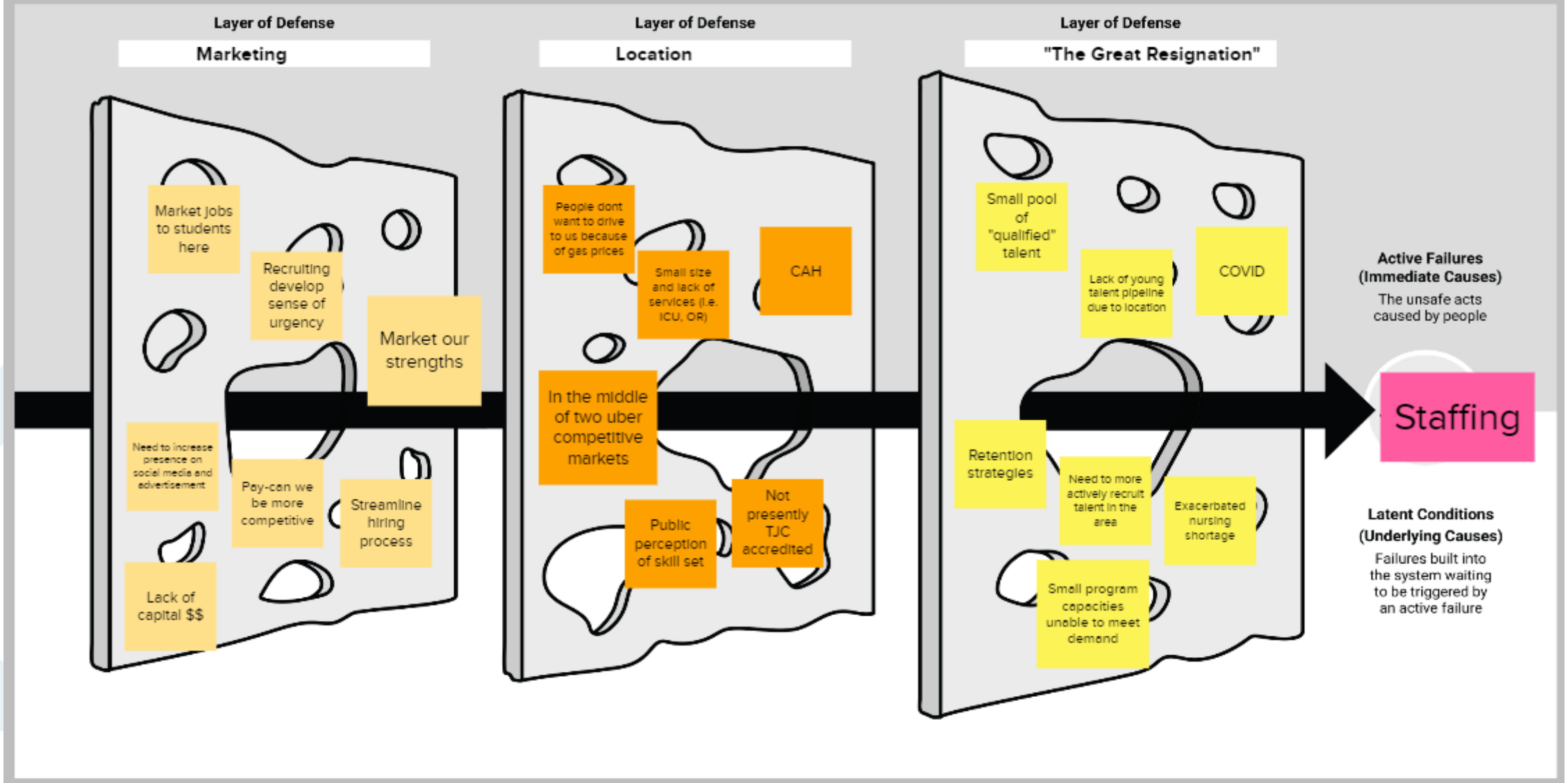

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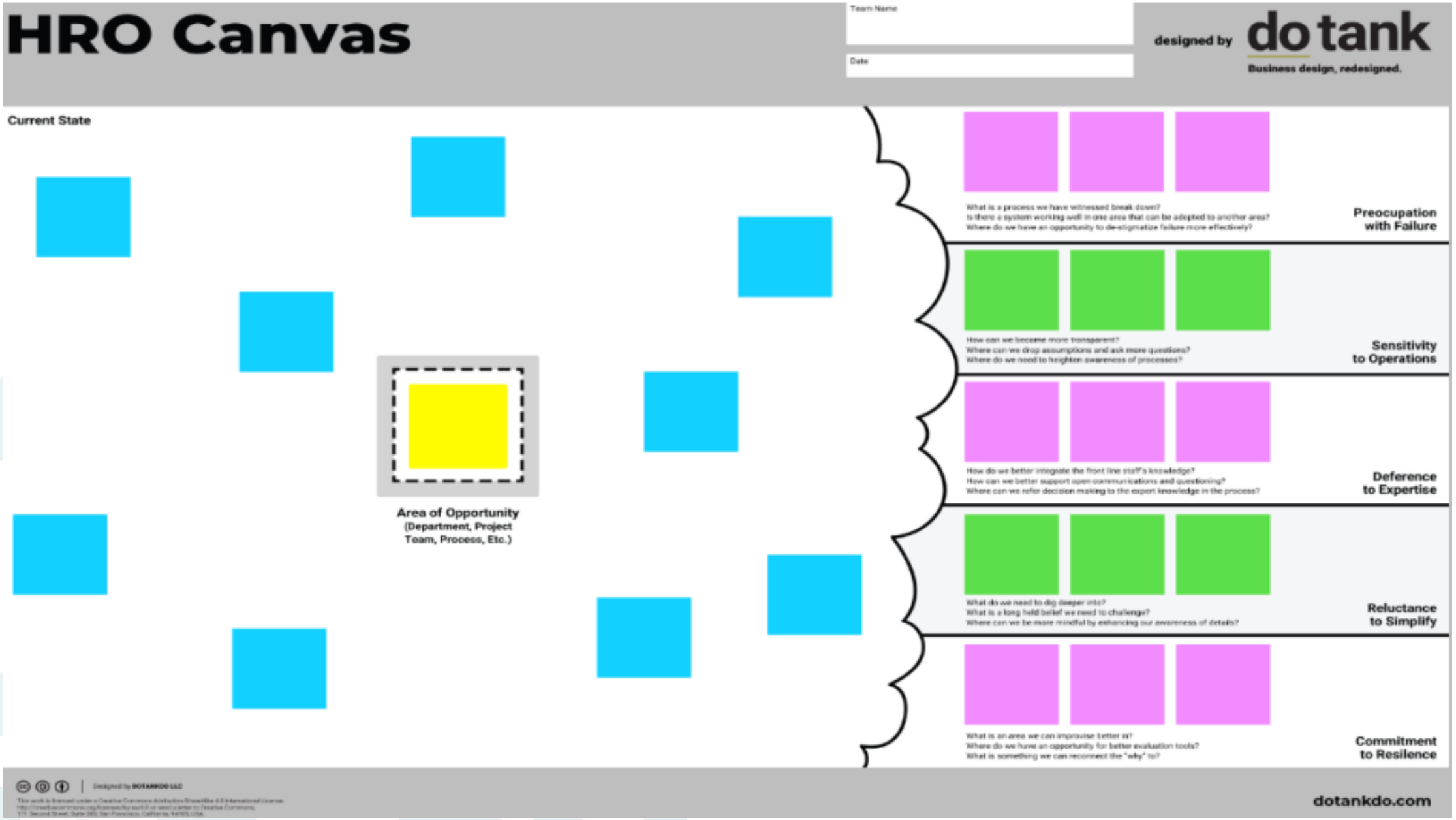
HRO Canvas


HRO Canvas
Team Name
Date
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Business design, redesigned.
Current State
Area of Opportunity
(Department, Project
Team, Process, Etc.)
What is a process we have witnessed break down?
Is there a system working well in one area that can be adopted to another area?
Where do we have an opportunity to de-stigmatize failure more effectively?
Preoccupation with Failure
How can we become more transparent?
Where can we drop assumptions and ask more questions?
Where do we need to heighten awareness of processes?
Sensitivity to Operations
How do we better integrate the front line staff's knowledge?
How can we better support open communications and questioning?
Where can we refer decision making to the expert knowledge in the process?
Deference to Expertise
What do we need to dig deeper into?
What is a long held belief we need to challenge?
Where can we be more mindful by enhancing our awareness of details?
Reluctance to Simplify
What is an area we can improvise better in?
Where do we have an opportunity for better evaluation tools?
What is something we can reconnect the "why" to?
Commitment to Resilience
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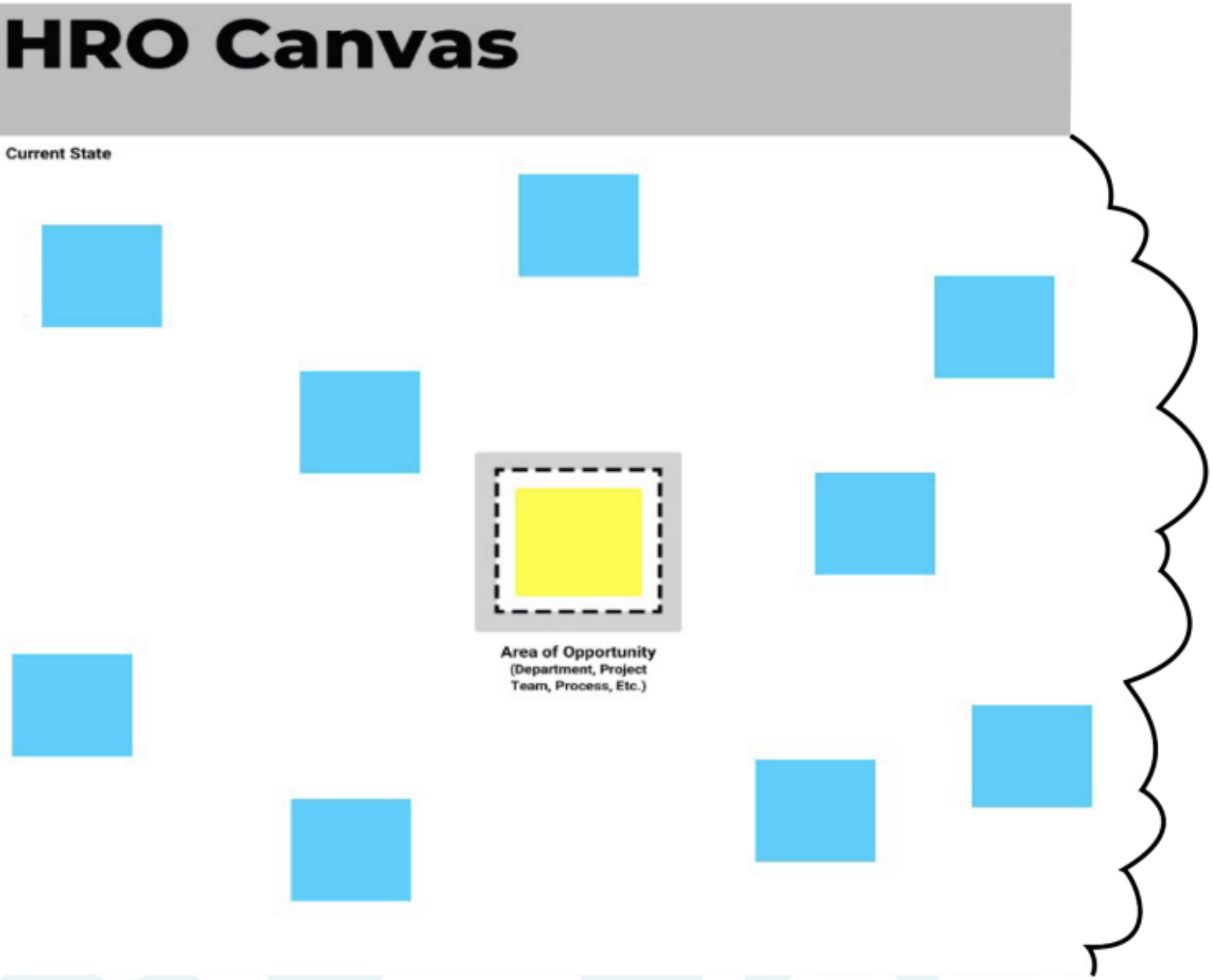
HRO Canvas



Identify the factors contributing to your "Issue" or "Area of Opportunity" for 10 minutes

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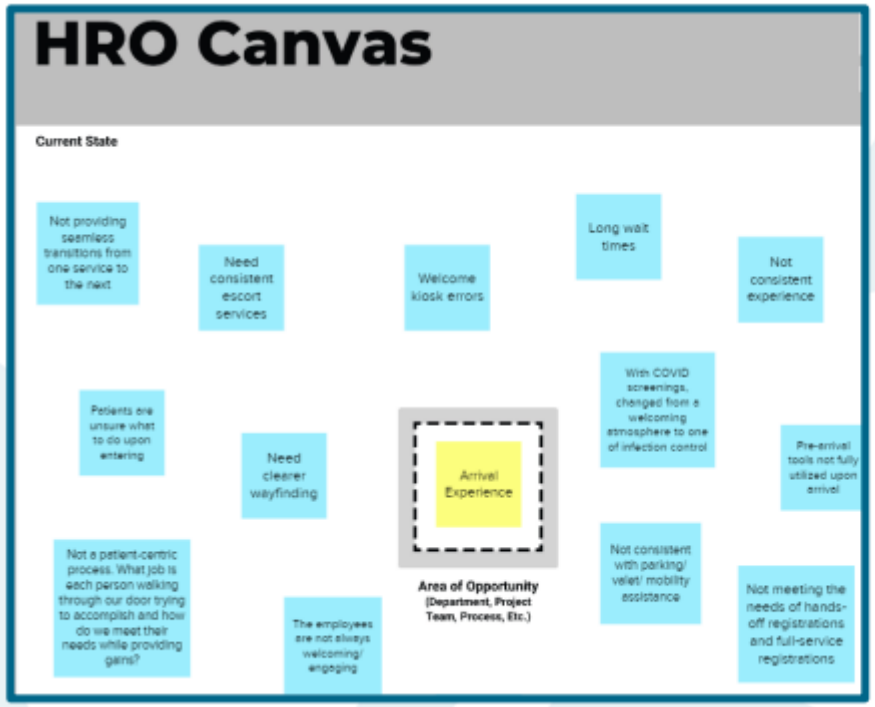
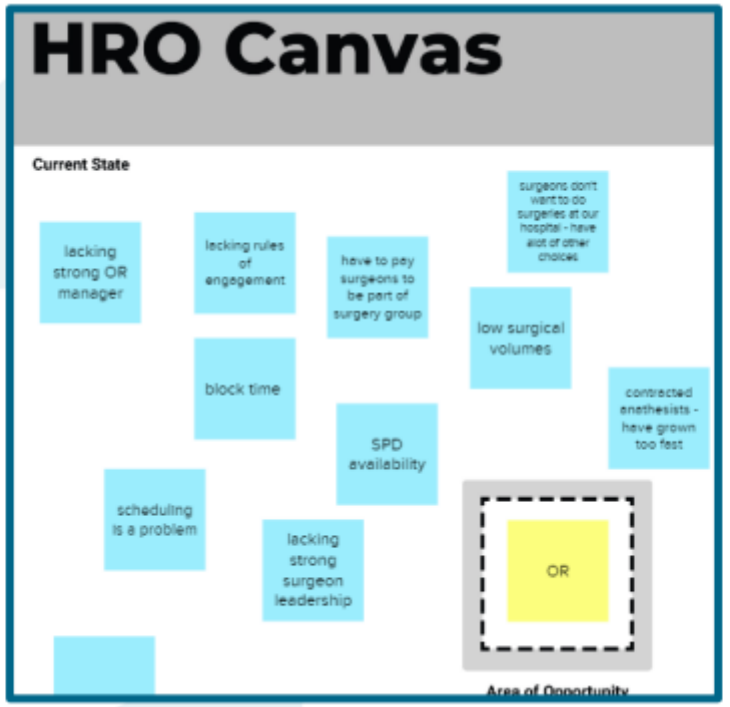
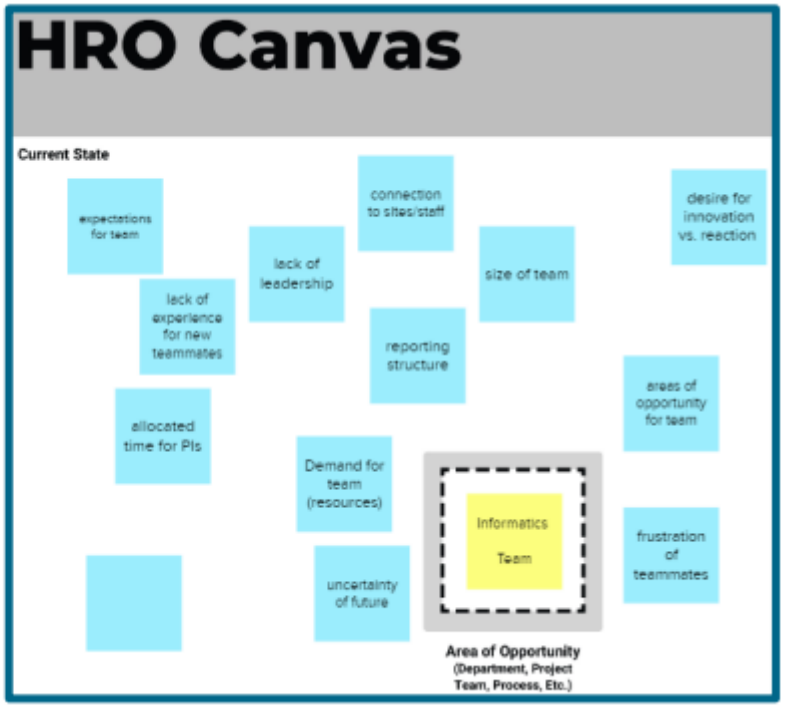
HRO Canvas


HRO Canvas
Current State
Not providing seamless transitions from one service to the next
Need consistent escort services
Welcome kiosk errors
Long wait times
Not consistent experience
With COVID screenings, changed from a welcoming atmosphere to one of infection control
Patients are unsure what to do upon entering
Need clearer wayfinding
Arrival Experience
Pre-arrival tools not fully utilized upon arrival
Not a patient-centric process. What job is each person walking through our door trying to accomplish and how do we meet their needs while providing gains?
The employees are not always welcoming/ engaging
Not consistent with parking/ valet/ mobility assistance
Not meeting the needs of hands-off registrations and full-service registrations
Area of Opportunity
(Department, Project Team, Process, Etc.)

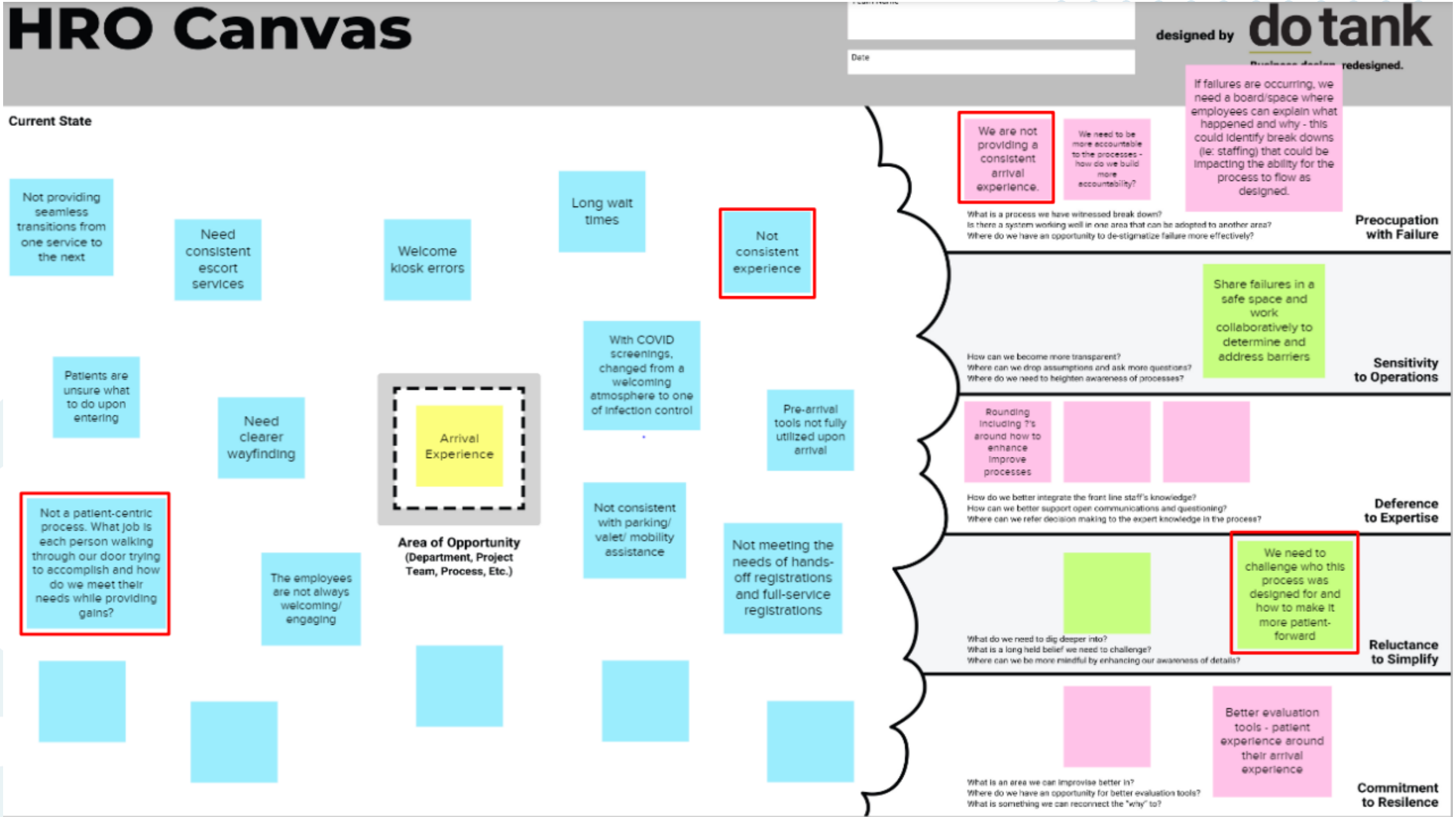

HRO Canvas
Current State
lacking strong OR manager
lacking rules of engagement
have to pay surgeons to be part of surgery group
surgeons don't want to do surgeries at our hospital - have alot of other choices
low surgical volumes
block time
contracted anesthesists - have grown too fast
SPD availability
scheduling is a problem
lacking strong surgeon leadership
OR
Area of Opportunity

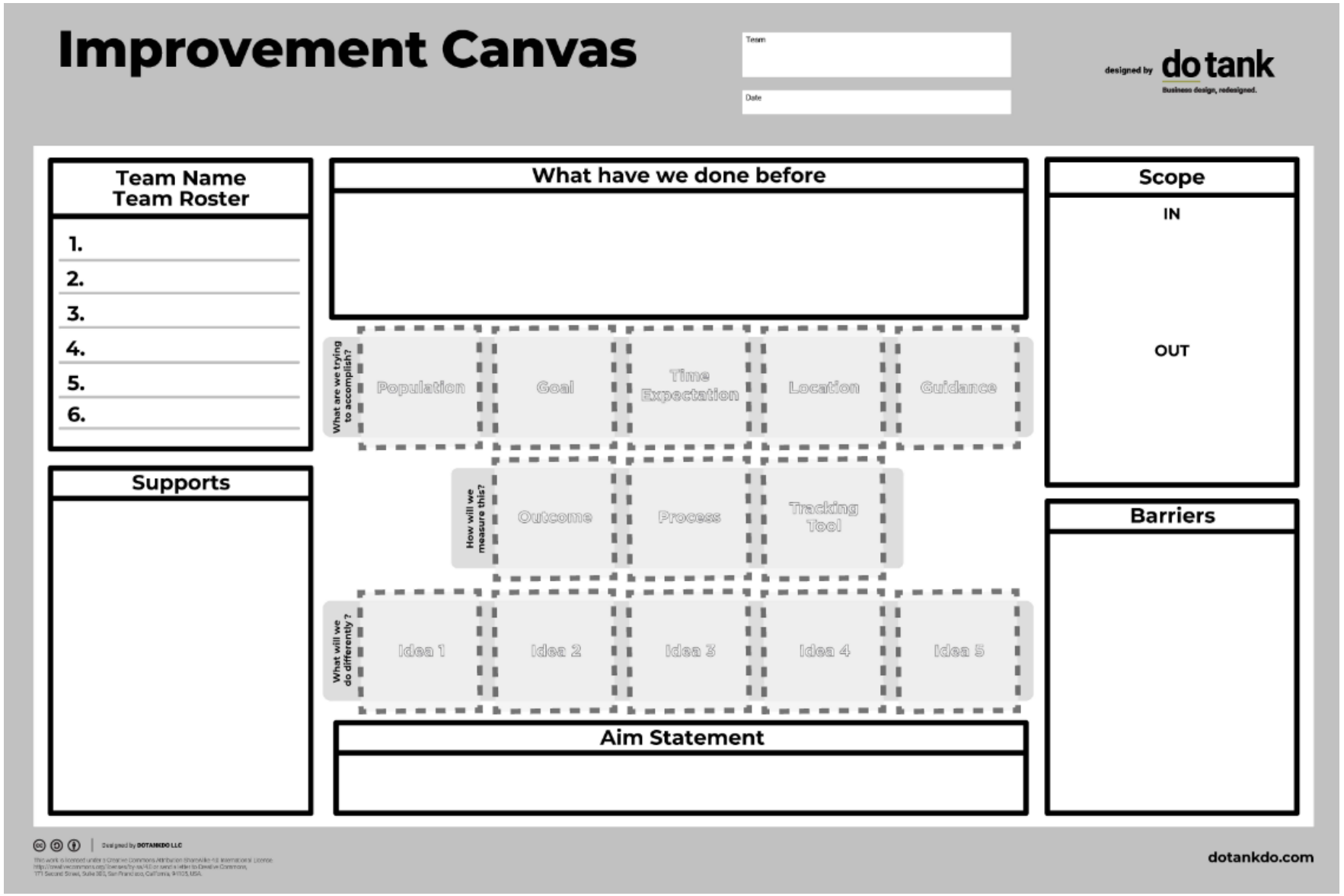

HRO Canvas
Current State
expectations for team
connection to sites/staff
desire for innovation vs. reaction
lack of leadership
size of team
lack of experience for new teammates
reporting structure
areas of opportunity for team
allocated time for PIs
Demand for team (resources)
Informatics Team
frustration of teammates
uncertainty of future
Area of Opportunity
(Department, Project Team, Process, Etc.)

HRO Canvas

- Now that you have outlined your Current State. Apply those identified factors you jotted down to the 5 HRO Principles.
- Don’t worry about the definition of the principle itself. Focus on the framing questions under each principle.
- Think of this canvas as allowing you to apply 5 different sets of lenses to the factors you identified contributing to your issue.
- This is where we start applying High Reliability Systems Thinking to your current state

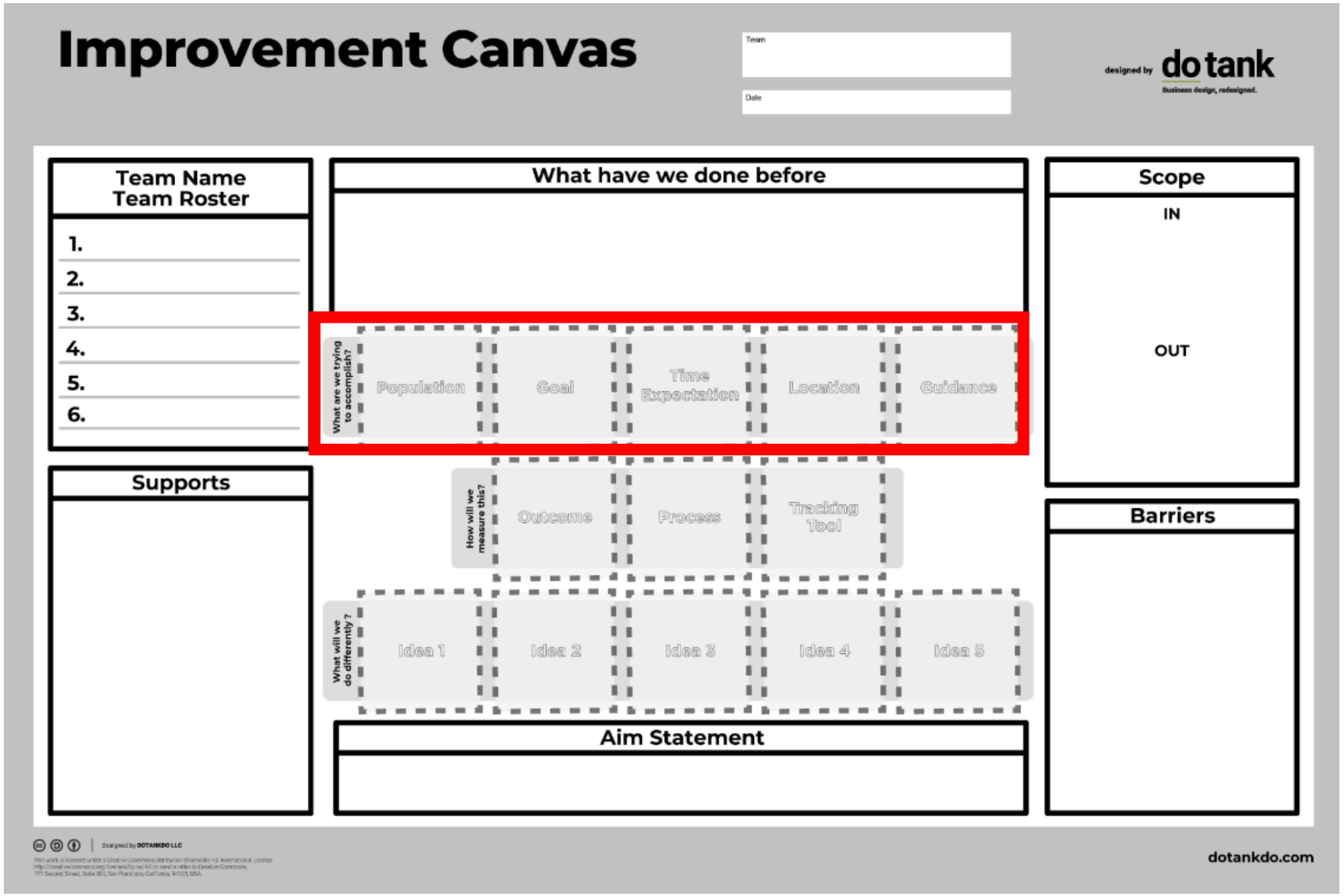
HRO Canvas


HRO Canvas
designed by dotank
redesigned.
Date
Current State
Not providing seamless transitions from one service to the next
Need consistent escort services
Welcome kiosk errors
Long wait times
Not consistent experience
With COVID screenings, changed from a welcoming atmosphere to one of infection control
Patients are unsure what to do upon entering
Need clearer wayfinding
Arrival Experience
Pre-arrival tools not fully utilized upon arrival
Not a patient-centric process. What job is each person walking through our door trying to accomplish and how do we meet their needs while providing gains?
Not consistent with parking/ valet/ mobility assistance
Area of Opportunity (Department, Project Team, Process, Etc.)
The employees are not always welcoming/ engaging
Not meeting the needs of hands-off registrations and full-service registrations
We are not providing a consistent arrival experience.
We need to be more accountable to the processes - how do we build more accountability?
If failures are occurring, we need a board/space where employees can explain what happened and why - this could identify break downs (ie: staffing) that could be impacting the ability for the process to flow as designed.
What is a process we have witnessed break down?
Is there a system working well in one area that can be adopted to another area?
Where do we have an opportunity to de-stigmatize failure more effectively?
Preoccupation with Failure
Share failures in a safe space and work collaboratively to determine and address barriers
How can we become more transparent?
Where can we drop assumptions and ask more questions?
Where do we need to heighten awareness of processes?
Sensitivity to Operations
Rounding including ?'s around how to enhance improve processes
How do we better integrate the front line staff's knowledge?
How can we better support open communications and questioning?
Where can we refer decision making to the expert knowledge in the process?
Deference to Expertise
We need to challenge who this process was designed for and how to make it more patient-forward
What do we need to dig deeper into?
What is a long held belief we need to challenge?
Where can we be more mindful by enhancing our awareness of details?
Reluctance to Simplify
Better evaluation tools - patient experience around their arrival experience
What is an area we can improvise better in?
Where do we have an opportunity for better evaluation tools?
What is something we can reconnect the "why" to?
Commitment to Resilence



Improvement Canvas

- Reflect on past organizational work
- Create an aim statement
- Identify action steps
- Outline a team roster
- Organizational supports
- Potential barriers
- Measurement (outcome and process)



Aim Statement Considerations

Your aim statement should be explicit, clear, unambiguous, precise, and plain.

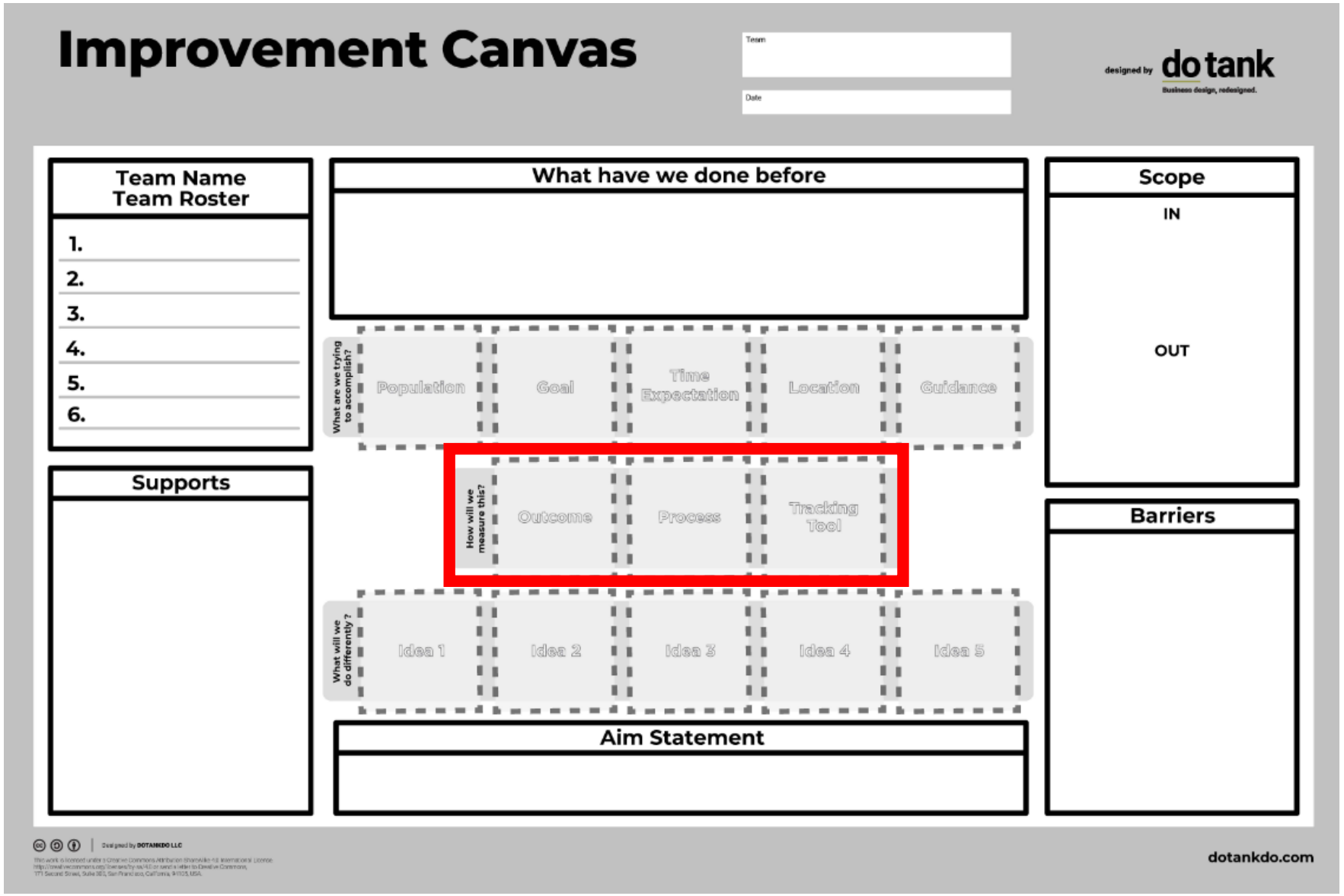
An aim statement should include the following essential components:

- **Population**
- **Goal**
- **Time Expectation**
- **Location**
- **Guidance**

- **Population**
- **Goal**
- **Time Expectation**
- **Location**
- **Guidance**

Aim Statement example:

We will increase the diversity of our **Board** *to* **better represent our patient population by adding 2 Board members in 2022** *who are demographically aligned with the majority of our patient population through the* **guidance of our CEO**.

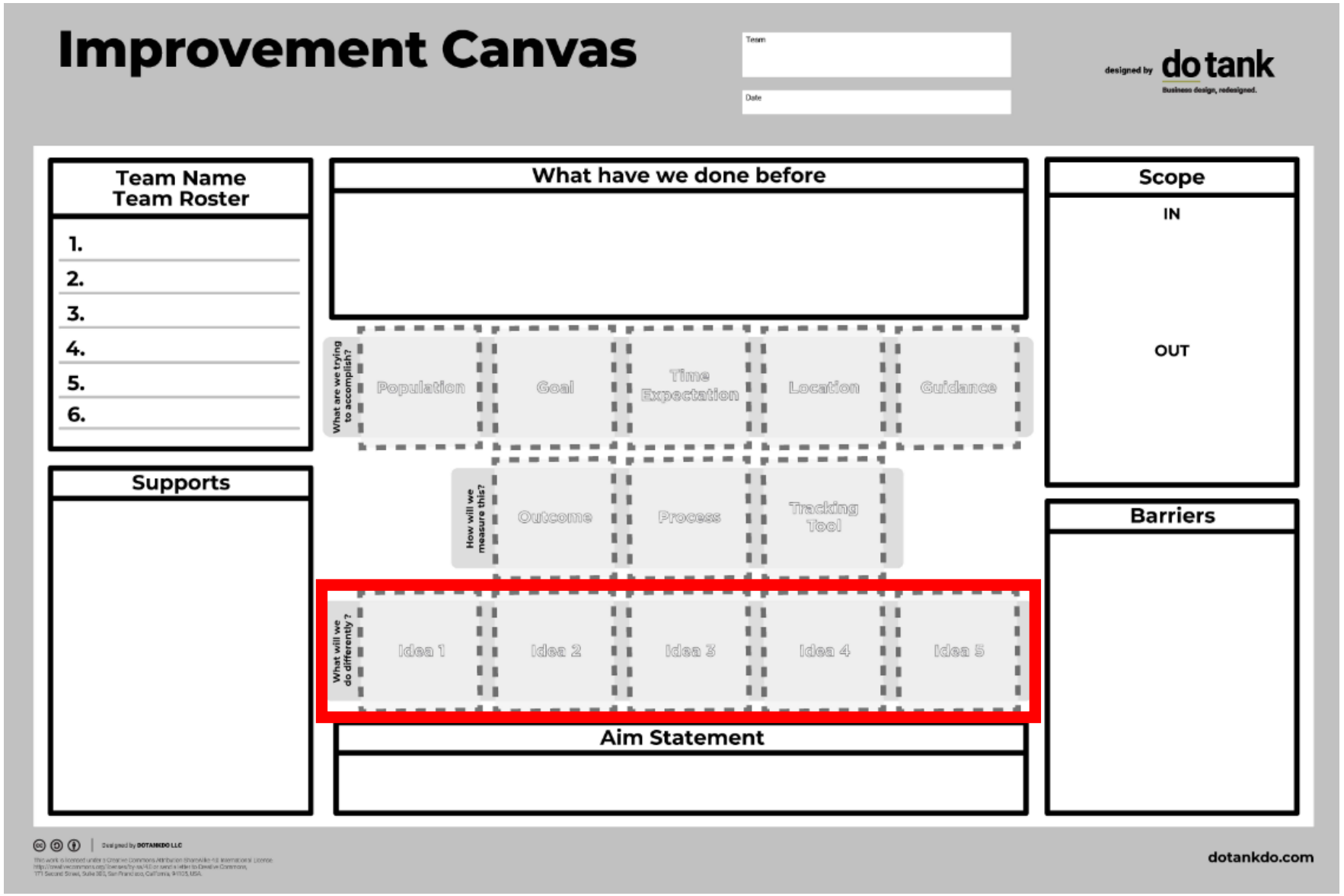


Measurement

Outcome Measure:
What you are measuring in your aim statement. The ultimate quantitative number you want to achieve.

Process Measure(s):
The specific steps in the process that lead to your outcome metric.

Tracking Tool:
The system you will have in place to monitor and track your Outcome and Process measures.



Action Steps

Action steps are **actionable, specific ideas** for achieving your aim

They can come from research, best practices or other organizations that have used the idea (technique) to achieve gains.

Think of your Action Steps as the key activities which must take place in order to achieve your aim statement.

Improvement Canvas

Team

Date July 27, 2022

designed by dotank
Business design, redesigned.

Team Name
Team Roster

1. Name & Role
2. Name & Role
3. Name & Role
4. Name & Role
5. Name & Role
6. Name & Role

What have we done before

- Department Head Discussion and Awareness
- Employee Events and Activities (Employee Morale Team)
- Wellness Activities and Committee
- Bonuses and Pay Increases
- Service excellence training
- Employee Recognition (Service Awards, Employee of 1/4, Star Cards, DAISY Awards, Newmark Award)

Scope

IN

- Entire organization
- Leadership

OUT

- new analysis of employee perception
- Create ideas from the survey results
- Implement new or improved methods to improve morale

Supports

- Leadership
- employees
- tools to create surveys
- belong to groups that could have resources (IHA, ICAHN)

Barriers

- ability to find survey
- push out survey
- time to analyze survey results
- participation

What are we trying to accomplish?

- All Staff
- Assess employee morale levels through survey with at least 75%
- 6 weeks
- Memorial Hospital Organization
- Leadership Team

How will we measure this?

- Gain insight of employee morale
- Initiate a survey to all organization employees
- Online survey with tools.

What will we do differently?

- Use a best practice employee question model
- Use multiple avenues to push out survey
- Inquire on specific morale items
- Idea 4
- Perform team analysis of the results

...nent

Assess employee morale for all organization staff with 75% participation with leadership analysis within 6 weeks of survey push

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Gameplan

Team Name

Date July 27, 2022

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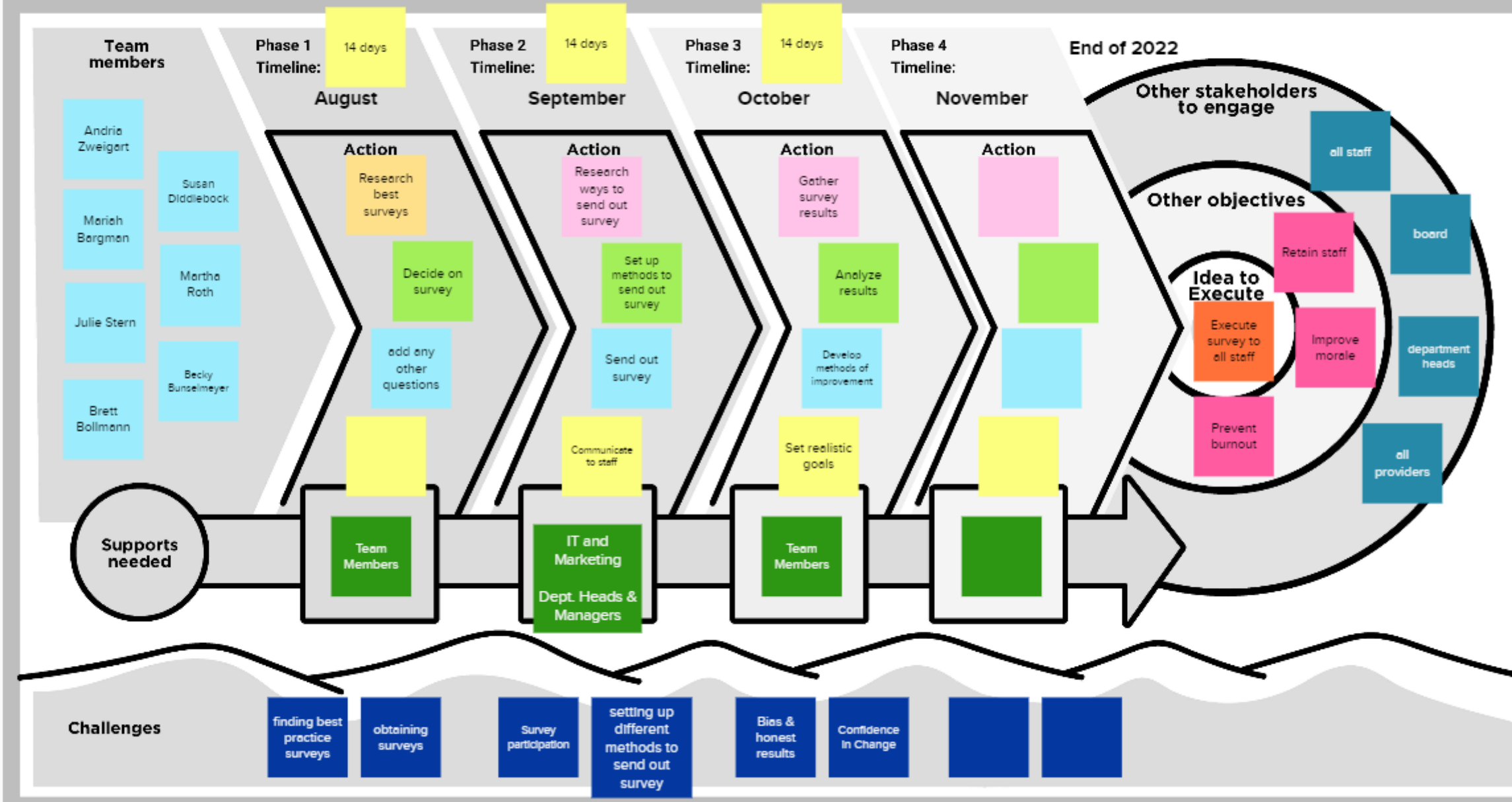
Use a best practice employee question model

Use multiple avenues to push out survey

Inquire on specific morale items

Perform team analysis of the results



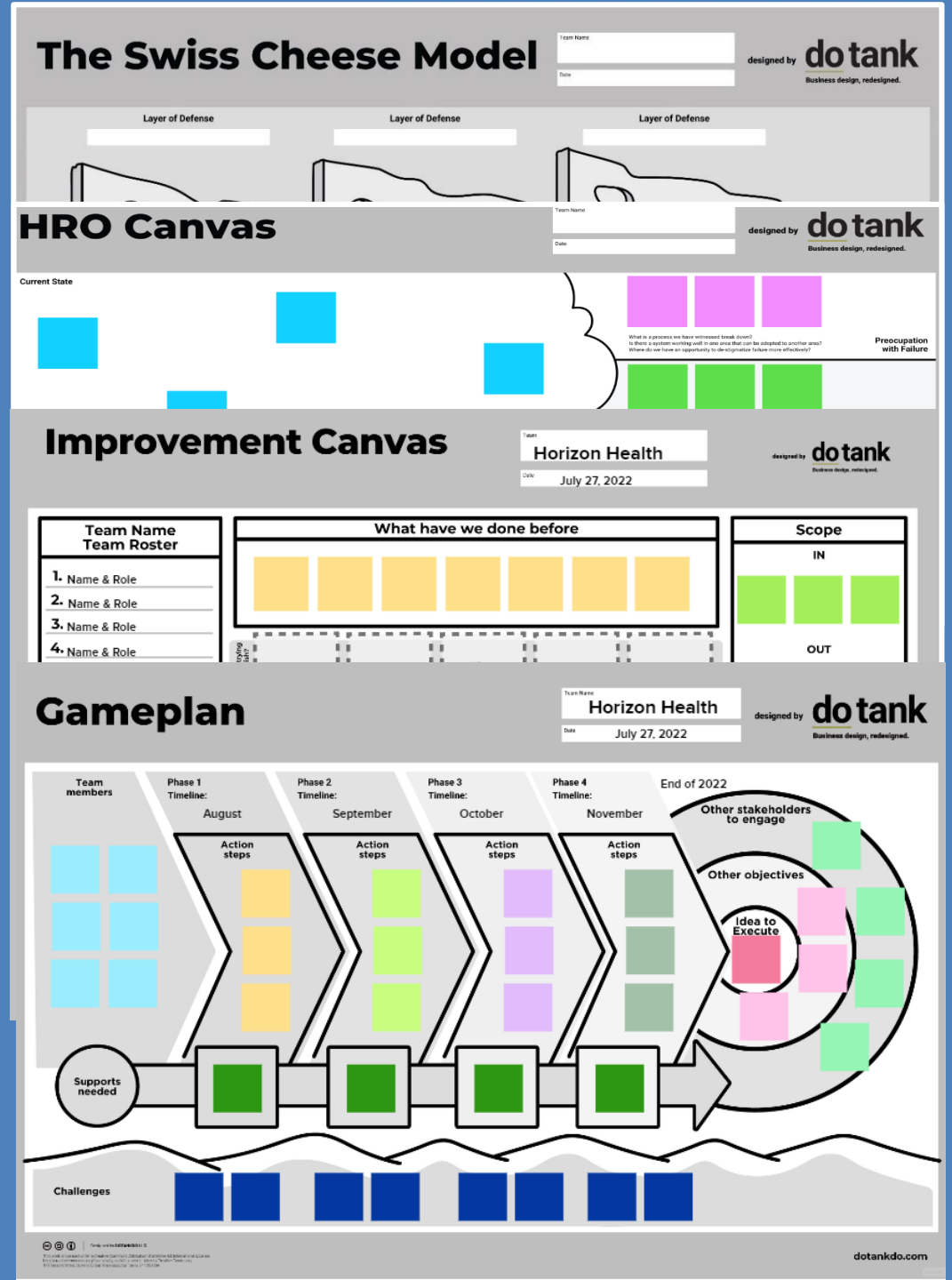
Our HRO Process

Illinois Health and Hospital Association

ICAHN Illinois Critical Access Hospital Network

dotank

1. **Identify a "Systems Issue"**
2. **Call out the factors contributing to that issue**
3. **Apply the principles of HROs to those factors:**
    1. **Sensitivity to Operations**
    2. **Commitment to Resilience**
    3. **Deference to Expertise**
    4. **Reluctance to Simplify**
    5. **Preoccupation with Failure**
4. **Take your systems level issue identified and apply an HRO Quality Improvement Lens**
5. **Create a Gameplan of activities to move this work forward**



AHA TeamSTEPPS

INFLUENCING CHANGE CANVAS

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PERSONAL	How might we make the undesirable desirable?	What training do we need?
SOCIAL	How might we harness peer pressure?	What people do we need to engage?
STRUCTURAL	How might we design rewards and/or demand accountability?	How do we need to change our environment, processes, and infrastructure?

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SWITCH MODEL CANVAS

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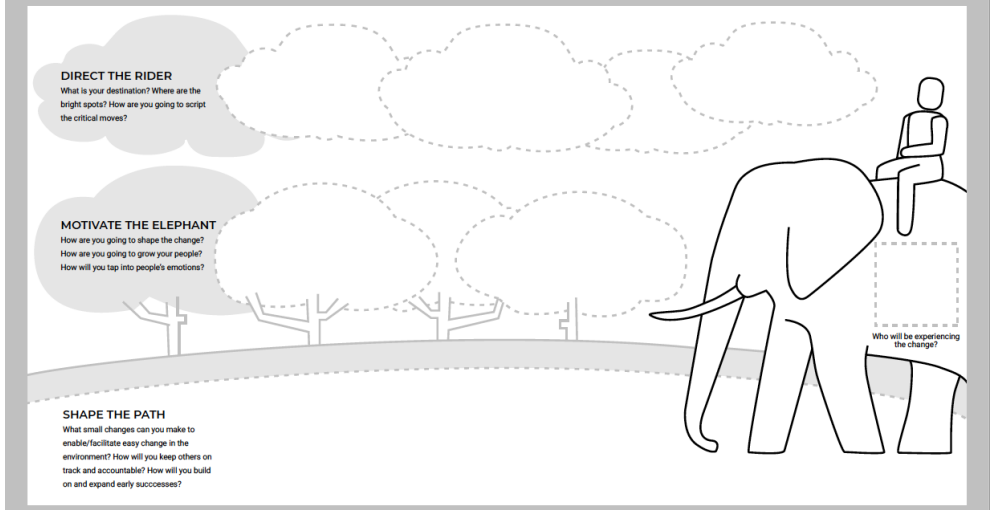

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INFORM YOUR WHY

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The Why
What is your challenge or opportunity for improvement?

What We Want To Learn
What insights will help you better understand the challenge you face? What information will help you frame the changes and improvements you aspire to?

The Data We Have
What relevant qualitative and quantitative data has already been collected?

The Data We Need to Collect
What qualitative and quantitative data is missing? How are you going to get it?

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STAKEHOLDERS CANVAS

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STAKEHOLDER	What do they need to accomplish?	What challenges do they face?	What motivates them?	How do we keep them engaged?
STAKEHOLDER	What do they need to accomplish?	What challenges do they face?	What motivates them?	How do we keep them engaged?
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RAPID REPLAY

THE VALUE OF HUMAN CENTERED DESIGN IN HEALTH CARE

?

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THE VALUE OF HUMAN CENTERED DESIGN IN HEALTH CARE

Improve health outcomes and patient experience

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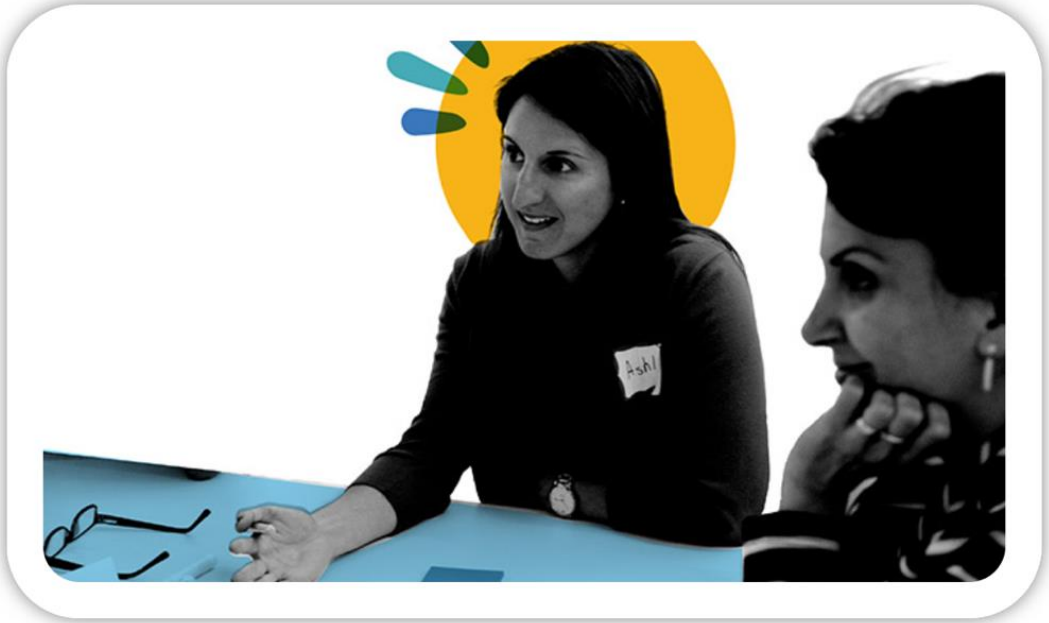

Enhance quality and spread best practice

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Enable inclusion and co-creation

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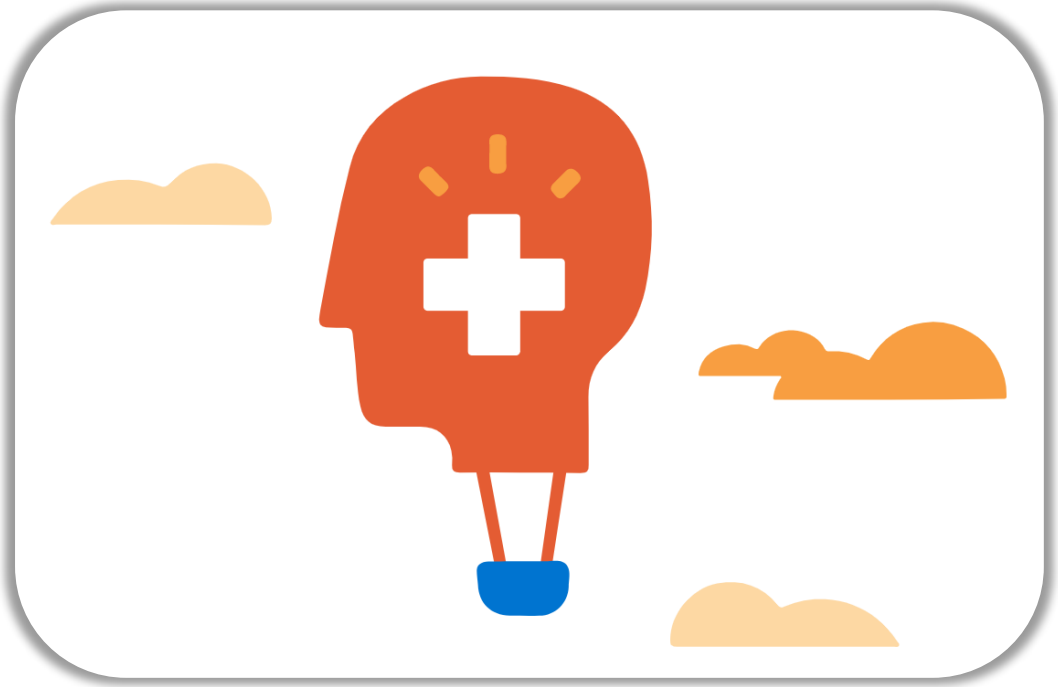

Reduce burnout and increase caring for each other

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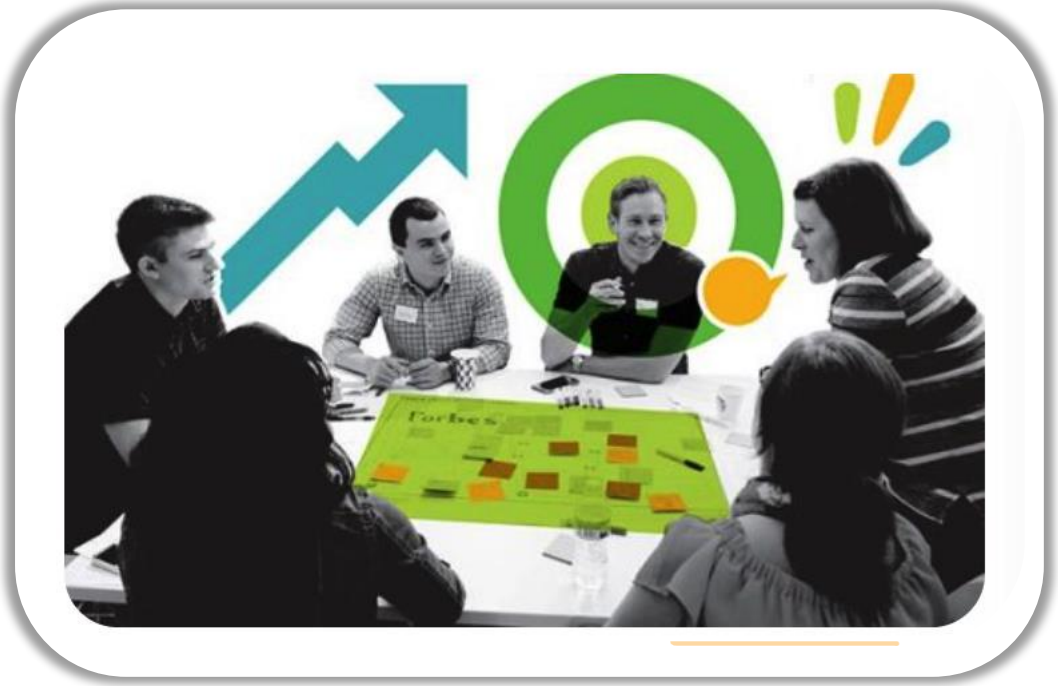

Design, test, and scale new products, processes, and services

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Help deal with emerging critical challenges

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Final Reminders

- **Evaluation**
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- **Continuing Education**
  - Create a Duke OneLink account if you have not done so
    - Instructions can be downloaded from the Files pod or your registration confirmation email
  - **Text JAVZUT to (919) 213-8033 within 24 hours**

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