

Leading the Patient Centered Medical Home (PCMH) Journey of Change

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Learning Objectives

- Assess your organization's readiness for the change needed for PCMH recognition or for the next level of advanced work you are taking on
- Understand tools and approaches to making effective change
- Learn the steps to a roadmap for change
- Recognize the importance of change management in going through and sustaining any type of transformational change, such as PCMH

Value

*Population
Health*

Team Based Care

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Person Centered

Integrated Primary-
Specialty-Behavioral Care

Transitional Care

**Integrated Delivery
System**

Accountable

Medical - Health Home

Social Determinants of
Health

Risk Stratification-
Care Management

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Why Change?

Value of Care

- To survive and thrive in this new health care environment, we need to focus less on volume and more on the value of care
- Moving towards the Quadruple Aim
 1. Population health outcomes
 2. Better individual patient care experiences
 3. Lower cost per capita
 4. Staff and provider joy in work
- Managed care moving toward value-based payment

**PCMH is the perfect model
for value based care**

What is Change?

***“To improve is to change;
to be perfect is to change often”***

-Winston Churchill

Change Support

- The process of preparing for, planning, executing, and sustaining organizational change
- Includes entire organizational system, with a focus on people
- It is not something we do **to** people; it is something we do **with** them



Question For You – POLL #1

Do you/your organization have at least one major change going on or are getting ready for a major change?

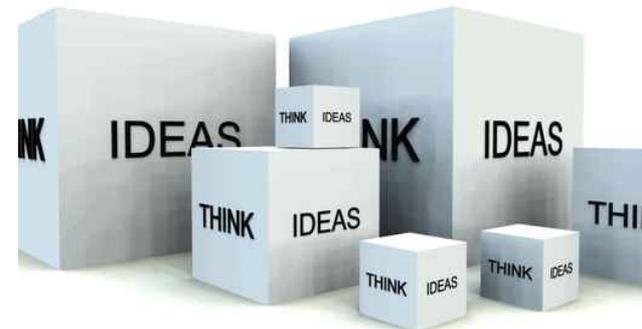
Please respond in the Webinar Poll with either Yes or No

Change Plan – Step 1



Save the Change Plan Template and open to complete Steps

In the first box on the change plan template, write down one change your organization is undertaking.....





Question For You – Change Plan Step 2

Using a confidence ruler, how important is this change to your leadership?

Please select the best answer in the Webinar Poll:

1 = Not important – leadership does not know anything about this

2 = Somewhat important – they have heard about this change but do not ask about progress

3 = On a List – this change is one on the list of changes to get done

4 = Important – this change is on the strategic plan and has resources put to it

5 = Very Important - Leadership has this change at the top of the list and is asking for routine progress updates



Question For You – Change Plan Step 3

Using a confidence ruler, how confident are you in your organization achieving this change?

Please select the best answer in the Webinar Poll:

1 = Not very confident

2 = Somewhat confident

3 = Confident some parts of this change will happen

4 = Quite confident majority of the change will happen

5 = Very confident - the change will happen and will stick

A Formula for Change

$$C = (abd) > x$$

Where:

C = Change

a = level of dissatisfaction with the status quo

b = clear and understood desired state

d = practical steps toward desired state

x = "cost" of changing

— David Gleicher of Arthur D. Little

The Ingredients of Effective Change

- *A change* worth making
- *Leadership* committed to the change
- *Resources* sufficient to make the change
- *A plan* to use those resources well
- *Skills* and *perseverance* to carry out the plan
- *An ability to learn* from doing
- Broad *participation* and *engagement* in the full change process



Question For You – Change Ingredients

Which of these ingredients for change do you believe you have in place for the next change project you are taking on? (multiple answers)

1. All stakeholders feel it is a change worth making
2. Leadership is committed to the change
3. There are resources sufficient to make the change
4. There is a plan for the work and the resources to be used to make the change
5. The organization reflects on past changes and learns from what went well and what did not go well

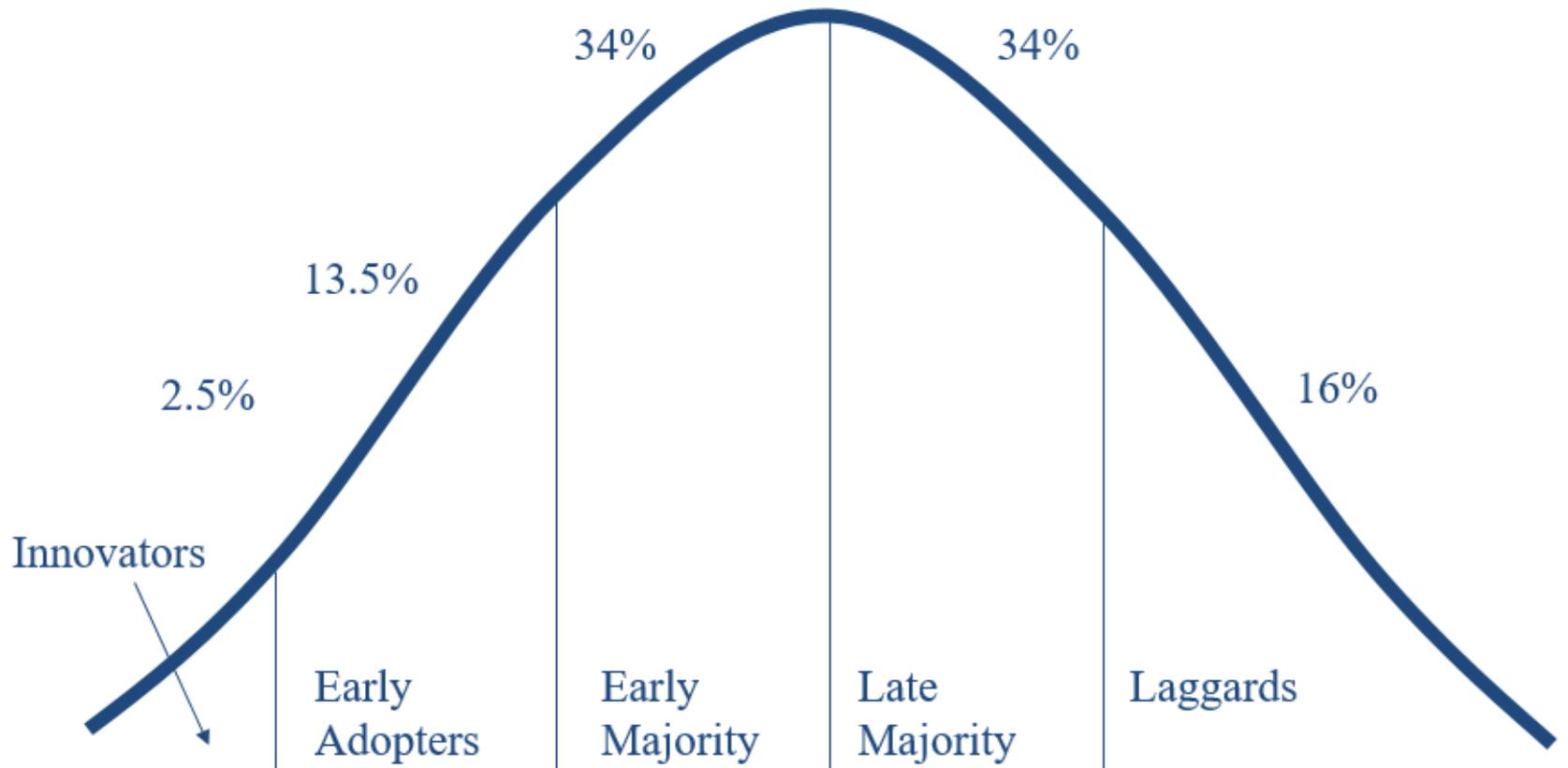
People and Innovation (Change)

BUILD YOUR CHANGE AGENTS

- People differ in reactions and receptivity to change
- People can resist one change but be very interested in another
- Different changes may elicit different patterns of response

Participants in Diffusion (Change)

The Bell Shaped Curve of Diffusion

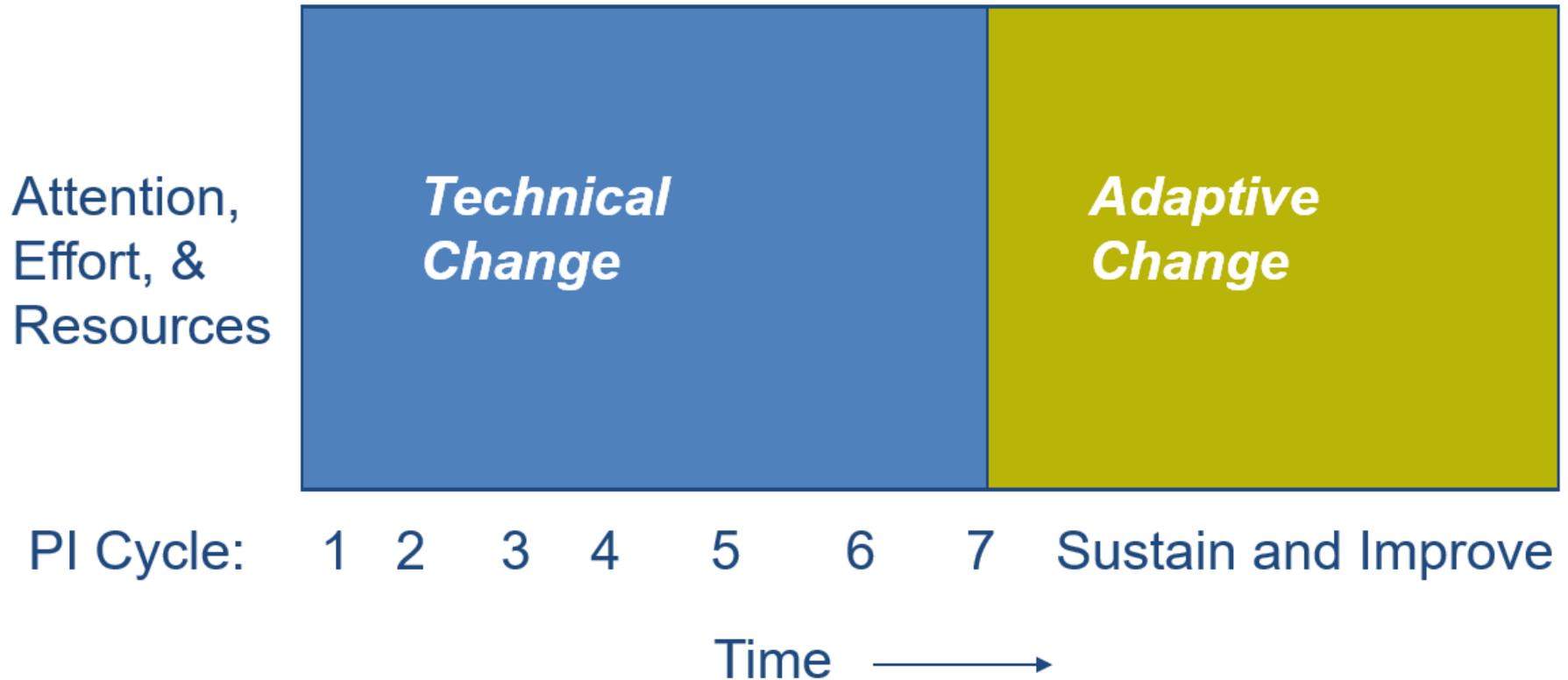


Change Plan – Step 4



List your change agents in your organization – those you want to put on this team or engage in making this change a success.

Typical Sequence for Change



The Journey to Change: Five Key Questions

Q1: What is the change?

Q2: How do we organize to manage (lead/support) this change?

Q3: Who (and what) will be affected by the change, and how?

Q4: How do we get from here to there?

Q5: How do we align change strategies with behaviors?



The Journey to Change Q1

Q1: What is the change?

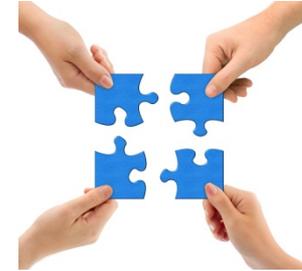
- Selecting the strategy – what is needing to change?
- Defining the change - describing the destination - the Aim (where you want to get to and why)
- Defining the change - how will you know when you get there?



The Journey to Change Q1

Successful Change Strategy...

- Valued by customers and/or staff
- Benefits greater than costs
- Sufficient resources (people, time, \$)
- Passionate leadership and participants
- Not too big or too small
- Necessary, not optional



Q2: How do we organize to manage (lead/support) this change?

- Establishing key change roles and change management infrastructure
- Assessing readiness for change



The Journey to Change Q2

Key Roles for Change

- Sponsor
- Team Leader
- Change Agent
- Change Participants



Readiness for Change

- Just as plants grow better in prepared soil, so too do change initiatives in prepared organizations
- Knowing the condition of your organization can help you decide:
 - Whether or not to make the change
 - What change to make (or not make)
 - How far or close is the alignment of existing norms and the new “norms”
 - How much extra adaptive work will have to be given during the change

Readiness for Change: Key Factors

- Compelling mission/vision
- Customer focus
- Flexible/response culture
- Prior change experience
- Positive climate
- Aligned incentives
- Capacity to undertake the change



The Journey to Change Q3

Q3: Who (and what) is affected by the change, and how?

Determine the impact of the change:

- On the work
- On the people
- On the formal and informal organizational structures

This includes:

- **What** is affected
- **How** much



Change vs. Transitions

Change

- External
- Can be planned and “engineered”
- Happens to us

Transition

- Internal
- Must be experienced
- We need to handle it personally



Question For You – Change Impact

Using the scale listed, what is the degree of impact this change will have on the work processes and people?

Please select the best answer in the Webinar Poll:

1 = Not very much

2 = Somewhat of an impact but many won't see or feel the change

3 = There will be an impact for a subset of people

4 = Quite a bit of impact across the organization

5 = Impact will potentially change systems and roles

Change Plan – Step 5



List a few of the changes that will have an impact on:

- Work processes
- Technologies
- People
- resources

The Journey to Change Q4

Q4: How do we get from here to there?

- Remember: All change is personal
- Levers of change:
 - Communication
 - Education/Training
 - Reinforcement (Recognition and Rewards)
 - Personal Support
- Plan “there to here,” travel “here to there”



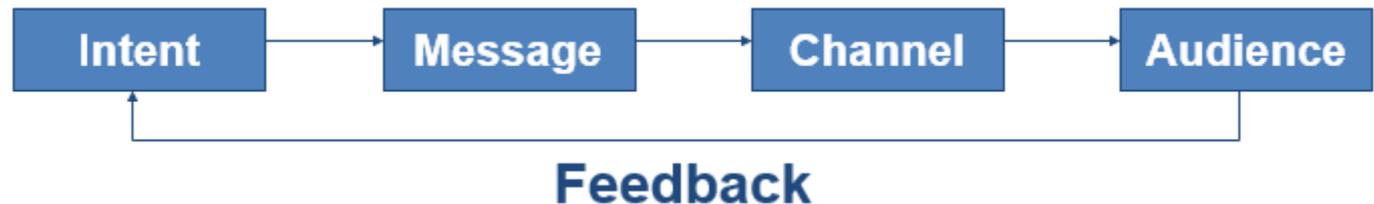
The Journey to Change Q4

Communication

Purpose:

- Provide change participants with information they need:
 - Awareness
 - Knowledge
 - Action

Process:



The Journey to Change Q4

Training

Purpose:

- Provide change participants with the knowledge and skills they need to succeed in the change

Process:



- Individuals
- Training Process

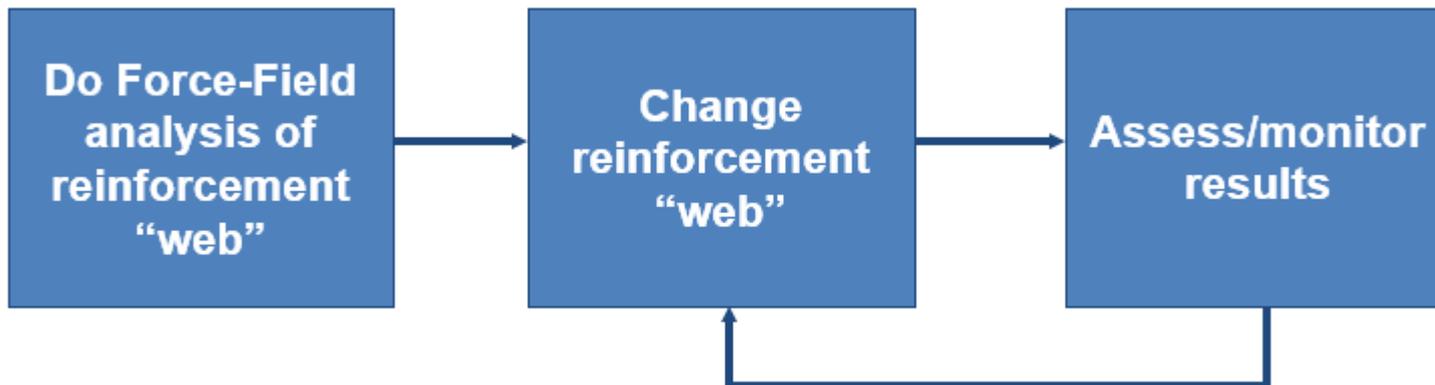
The Journey to Change Q4

Reinforcement

Purpose:

- To make it easy (or easier) to do the “right” things and hard (or harder) to do the “wrong” things

Process:



Personal Support

Purpose:

- Help people through -
 - 1) The stages of transition, and
 - 2) Their resistance

Process:

- Sorry, no simple formula to follow for this one

Change Plan – Step 6



Think through the questions and jot down ideas on the:

- Communications plan
- Training plan

What is Resistance?

Resistance

IS	IS NOT
<ul style="list-style-type: none">• Inevitable and emotional response	<ul style="list-style-type: none">• Necessarily logical
<ul style="list-style-type: none">• A natural function of disruption	<ul style="list-style-type: none">• A sign of disloyalty
<ul style="list-style-type: none">• Manageable	<ul style="list-style-type: none">• Something to overcome or combat
<ul style="list-style-type: none">• An attempt to protect or defend the individual FOR and protect them from harm	<ul style="list-style-type: none">• Aimed at you or to be taken personally
<ul style="list-style-type: none">• A sign that the potential for change exists. An indirect expression of underlying concern	<ul style="list-style-type: none">• Designed to discredit your competence, despite the words being used
<ul style="list-style-type: none">• A sign of controlling the change process	<ul style="list-style-type: none">• Indicative of poor performance
<ul style="list-style-type: none">• A learning process	<ul style="list-style-type: none">• A sign that the change process is out of control

Most Common Mistakes in Managing Resistance

- Attempting to change the end user's view with "logical" arguments about why they should change
- Dealing with the person; not the issue
- Ignoring the end user's emotions and behaviors concerning the change
- Assuming what is "logical" to you is logical to the end user
- Giving up or not repeating the process

Effective Behaviors in Managing Resistance

- Creating rapport. Build strong working relationships
- Establishing expectations and providing context
- Explaining the change in terms of the stakeholder's WIIFM*
- Establishing the source of resistance from the stakeholder's point of view
- Asking open-ended questions—support and invite open expression
- Occupy less than 25% of the air time - be quiet and listen
- Utilize the stakeholder's energy to help manage the situation
- Create WIN-WIN situations
- Repeat the resistance management process

*WIIFM
What's in
it for me?

Q5: How do we align change strategies with behaviors?

- In other words, after planning the work it is now time to *work the plan*
- Use the structures, roles, and processes you have put in place to manage the change
- On-going alignment questions:
 - *Are we on course? If not, what do we need to do to get back?*
 - *What are we learning from our experiences?*
- Repeat through all steps as needed....



Summary



Questions or Comments?

Please enter your questions or comments in the Questions Pane of your webinar control panel or click on the *Raise your hand* icon.

Contact



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