

FELLOW IN HUMAN EXPERIENCE – PROGRAM CHECKLIST

These steps focus on the specific actions needed to complete the Fellow in Human Experience. These steps are taken after completion of the *Certificate of Patient Experience Leadership* and acceptance into the *Fellow in Human Experience* Program.

STEP 1. Establish your project focus and finalize your plan. Building on the project ideas you proposed in your application, work with your Institute coach to settle on a final plan for your project. Finalizing your project plan with your coach is considered project day 1 and meeting 1. This plan should include:

1. The objective of my project is:
2. The reason this project is important is:
3. To achieve my objective, I will need to work with the following people/parts of my organization:
4. The steps I will take to implement this plan are:
5. My plan targets:
 - a. My targets for checkpoint 1 (approximately 3 months) are:
 - b. My targets for checkpoint 2 (approximately 6 months) are:
 - c. My targets for checkpoint 3 (approximately 9 months) are:
6. The outcomes I hope to achieve as a result of this plan are (What are the outcomes and how will you measure them?):

STEP 2. Execute on your project plan. Move your project plan forward and execute on your main project steps. Participants should also work with the program team to establish their series of check in meetings with their Institute coach. At each checkpoint meeting participants should be ready to update their coach on:

1. Where they are on their project. (What steps)
2. How they have performed in comparison to anticipated targets for that checkpoint.
3. How their plan may need to be adapted as a result of what they have experienced/learned (including updates to other milestone targets)
4. What support is needed from/questions do they have for their Institute coach.

Sometime after checkpoint 3 participants should work to schedule their final presentation meeting.

STEP 3. Final Checkpoint & Presentation Prep. The final check point meeting at about 11 to 12 months is focused on prepping the final project presentation. The final presentation will follow a simple outline.

1. Project title/description
2. The objective I had for my project.
3. What I did to move my project forward (include how I adapted/changed my plan along the way)
4. What I hoped to achieve in my project
5. The outcomes I realized through my project.
6. The information/knowledge I believe should be shared/would be replicable or applicable in other organizations is...
7. The final format in which I seek to share my project results (research report, webinar, etc.)

STEP 4. Final Review Presentation. Deliver your final project presentation to your review panel.

STEP 5. Formal Presentation/Project sharing. Deliver your findings to the Institute community via webinar, report or other means as determined.

STEP 6. Achieve your *Fellow in Human Experience* from *The Beryl Institute* and Celebrate!