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IMPLEMENTATION TOOLKIT

WHAT MATTERS TO YOU?

Ask What Matters. Listen To What Matters. Do What Matters.

VISIONARY

Damara Gutnick, MD
Medical Director, MHVC; Associate Professor, Departments of Family & Social Medicine, Psychiatry & Behavioral Health Sciences, and Epidemiology & Population Health, The Albert Einstein College of Medicine

AUTHORS

- **Damara Gutnick, MD:** *Medical Director, MHVC*
- **Christina Hamilton, PMP:** *Reporting & Project Manager, MHVC*
- **Natalee Hill, MPA, CPHQ:** *Director of Quality & Innovation, MHVC*
- **Tawana Howard-Eddings MSN, RN:** *Director, Practice Transformation*
- **Joan Chaya, SHRM-SCP:** *Senior Director of Workforce Development & Management, MHVC*
- **Allison McGuire, MPH:** *Vice President of Integrated Health Systems, Montefiore Medical Center; Executive Director, MHVC*
- **Patricia Damrow:** *Senior Project Manager, MHVC*
- **Tycily Hunter, MS:** *Project Associate, MHVC*
- **Bob Klaber:** *Pediatrician, Imperial College Healthcare NHS Trust*

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TABLE OF CONTENTS

A Letter from MHVC's Medical Directors	**4**
WMTY Introduction	**6**
What is WMTY?	**6**
Why is it important?	**6**
What's in it for me?	**6**
WMTY Patient Experience Track	**7**
WMTY Staff Engagement Track	**8**
Don't Squash The Movement	**9**
International Spread	**11**
Change Management: ADKAR	**12**
A Word on Kindness	**13**
WMTY & Motivational Interviewing	**14**
WMTY Impact	**15**
Doing What Matters	**17**
Top Tips	**19**
How to Use This Toolkit	**20**
WMTY Implementation Framework	**21**
Project Initiation Phase	**22**
Patient Experience Track	**29**
Staff Engagement Track	**42**
Taking Action	**43**
Additional Resources	**55**
Case Studies	**55**
Sizzle Reels	**56**
MHVC Posters	**57**
WMTY Training Materials	**57**
WMTY Action Tools	**57**
Literature	**58**
Podcast Episodes	**58**
WMTY Partners Around the World	**58**
WMTY Videos	**58**
References	**59**

Navigating the Toolkit:
The Navigator below is available on each page to allow you to easily return to this page, TOC, and to the start of each project phase.

NAVIGATOR

TOC | Start | PX | Staff

A LETTER FROM THE MHVC MEDICAL DIRECTOR

Damara Gutnick, MD

Few things in healthcare spread like wildfire. "What matters to you" (WMTY) is one. Introduced in a two-page editorial on Shared Decision Making published in the *New England Journal of Medicine* by Michael Barry, MD and Susan Edgman-Levitan, PA in early 2012, WMTY was piloted that same year in Norway and Scotland. Maureen Bisognano, President Emerita and Senior Fellow at the Institute for Healthcare Improvement (IHI), then challenged the medical community to shift healthcare from *"What's the Matter?"* to *"What Matters to You?"* during her 2014 IHI Forum keynote address, sparking an international WMTY movement that has now spread to over 49 countries worldwide.

WMTY conversations help healthcare teams understand what is "most important" to patients, leading to better care partnerships and improved Patient Experience. Agreeing on *"what matters"* was recently identified as one of 5 practices with the potential to enhance physician presence and meaningful connection with patients in the clinical encounter, and WMTY is one of the Age-Friendly Health System's 4Ms (What Matters, Medications, Mentation, Mobility). Asking staff WMTY is also a foundational element of IHI's Framework for Improving "Joy in Work." and aligns closely with the "Spirit of Motivational Interviewing."

MHVC first introduced WMTY as a person-centered approach to care, to our Hudson Valley provider network during a series of regional meetings in June 2017. (Watch my original keynote address here). By WMTY Day -- June 6, 2018 -- a year later, multiple MHVC partner organizations not only embraced WMTY but expanded it: Creating new tools and techniques, sharing results with others, and documenting the benefits. WMTY is now an integral part of the way MHVC partners think, work, plan, and interact with others. And our dissemination efforts have helped spread the movement across New York State, nationally and internationally.

Healthcare professionals now recognize our network as a North American leader in WMTY implementation. This acknowledgment is a testament to the creativity and commitment of our partners to embrace WMTY, and in some cases, even integrate it into their organizational cultures. WMTY is for everyone, not just for patients. Over the past year, MHVC partners have asked "What Matters to You?" to their staff and received answers that have helped improve workplace, administration, human resources, policies, and staff retention. Asking WMTY feels different. It elicits a deeper, more honest, and direct response. For a caregiver, it helps you meet your patients or clients where they are at. For a leader, it grants opportunities to better understand what is most important to our staff. It is also a gratifying experience for the listener because they feel that their provider or leadership cares.

MHVC is excited to share our new WMTY implementation toolkit. It is designed to thoughtfully and systematically guide organizations through WMTY implementation using a change management lens. In it, we provide implementation strategies, tools, templates, suggested metrics, references, and links to resources and videos from around the world that can help you build local momentum.

Consider this, what if every provider, administrator and staff member, in every care setting, asked every person "what matters to you?" and really listened to what was important to the individuals they work with. . . if care was designed around what really matters to each person, what would the impact be?

Damara Gutnick, MD
Medical Director
Montefiore Hudson Valley Collaborative

Associate Professor
The Albert Einstein College of Medicine

@DrDamara1

What Matters To You?

What is WMTY?

Healthcare providers worldwide, are invited to add one simple question to every patient interaction, each and every day, in order to improve care. That question is, "What matters to you?" This global movement started in 2014, with the simple goal of encouraging meaningful conversations between patients, caregivers, families, and their healthcare providers.

Why is it important?

Providing patient-centered care is important because it results in better outcomes for patients and greater satisfaction with care. Asking "What Matters to You?" supports this by putting the patient voice at the center of care, by focusing on what matters to them.

What's in it for me?

PATIENTS

- My care team co-designs my care plan based on what matters to me
- I feel that my care team really cares about me and this improves my overall experience

STAFF

- I feel that my work is more meaningful. I can provide care that meets my patient's preferences.
- I feel more engaged in my work
- I find joy in my work
- I have an increased sense of partnership with my organization, team members and patients

WMTY IMPLEMENTATION

Patient Experience Track

Overview

"What matters to you?" is a simple question that can have a large impact on patient care. When providers ask this straightforward question and engage in conversations about what really matters to the people they care for, it can have a profound impact on the patient's engagement and overall experience. By asking, listening, and doing what matters, the provider is putting the patient's voice at the center of their care. This helps to ensure that care is aligned with patient preferences, providing more patient-centered care.

The WMTY Implementation Toolkit, provides a step-by-step guide for incorporating WMTY into daily practice. A mid-size to large organization looking to improve the patient experience, care planning, and care delivery, through the incorporation of WMTY, can utilize the Patient Experience track within this toolkit for implementation guidance. This toolkit has been equipped with all of the tools and resources needed to successfully implement, evaluate, and sustain the WMTY program for your patients.

Case study examples of WMTY implementation, that have demonstrated an improvement in patient experience, are provided in this toolkit (see case study examples here in the Additional Resources section).

Patient Experience Track: Benefits

Implementation of the WMTY initiative has proven to provide the following benefits:

Improved Quality of Care	**Improved Patient Outcomes**	**Improved Patient Engagement in Care Planning**	**Enhanced Patient-Centered Culture**
Increased Provider Joy in Work			

British Columbia has compiled a guide to assist providers, patients, family members, and caregivers in having conversations about what matters most to patients. This guide can be found here.

WMTY IMPLEMENTATION

Staff Engagement Track

Overview

Ask your staff "What Matter to you?" By asking and listening to what matters to your staff, you are better able to implement targeted interventions that help to increase overall employee engagement, retention and joy in work.

The WMTY Implementation Toolkit, provides a step-by-step guide for incorporating WMTY into daily practice. A mid-size to large organization looking to improve the staff engagement, retention, and overall joy in work, through the incorporation of WMTY, can utilize the Staff Engagement track within this toolkit for implementation guidance. This toolkit has been equipped with all of the tools and resources needed to successfully implement, evaluate, and sustain the WMTY program for your staff.

Case study examples of WMTY implementation for improvement of staff engagement are provided in this toolkit (see case study examples here in the Additional Resources section).

Key Questions Before Getting Started

Before implementing WMTY for staff it is very important that organizations asks themselves two key questions. If you answer yes to both of them, then move forward with implementation. If you answer no, to one or more of these questions, then please consider if implementing this is right for your organization at this time.

1. Are you prepared to engage in meaningful conversations with your staff regarding what really matters most to them in their work?
2. If they express concerns about their work experience, are you as an organization committed to addressing these concerns?
    - Please Note: Addressing concerns does not mean that you must implement solutions for all identified issues. What matters here is having a conversation with your staff about their concerns, acknowledging them and being clear about solutions that you can or may not have the capacity or authority to implement at this time. This fosters an environment of trust, transparency, and partnership.

Staff Engagement Track: Benefits

Implementation of the WMTY initiative has proven to provide staff with the following benefits:

Improved Joy in Work	**Increased Retention**	**Increased Organizational Partnership**

THE WMTY MOVEMENT

Don't Squash the Movement!

WMTY has become a global movement that has spread across over 49 countries. Through our experience implementing WMTY across diverse provider organizations, we have noticed that unlike other workflow changes, integrating **WMTY** into care delivery **spreads differently** – **like a movement** – as staff try it and personally experience the impact, they share stories with colleagues and peers, and the **momentum spreads**.

We created this toolkit because we firmly believe that integrating WMTY into the care continuum has the potential to positively impact both patient and provider experience, and we have emerging data from our network partners that support this theory.

Staff and caregivers at diverse organizations across multiple roles have shared that **"asking," "listening," and "doing"** *what matters* empowers them to address what is most important to the people they care for, **making their work more meaningful**. While burnout can adversely impact both provider satisfaction at work and job tenure, growing evidence supports that feeling your work has "purpose," protects against burnout and is associated with more *"joy in work*." Likewise, asking staff about what matters to them helps identify actionable "pebbles in their shoes" that management can address using improvement science, thus boosting staff engagement and forging a closer relationship between personnel and leadership.

Across the world, we are beginning to demonstrate the impact of WMTY implementation on patient experience and other quality metrics. For example, Geraldine Marsh at Glasgow and Clyde Hospital in Scotland witnessed a 46% reduction in falls on geriatrics units after integrating WMTY into workflows. Human Development Services of Westchester (HDSW) introduced WMTY to their staff as a strategy to elicit SMART goals and observed an 80% improvement in patient SMART goal documentation in care plans (Link to HDSW Case report). After our Montefiore Nyack Hospital partners integrated WMTY across all of their hospital's impatient service lines, they recorded upward trends in 10/11 Patient Experience Metrics (Link to Nyack Case report).

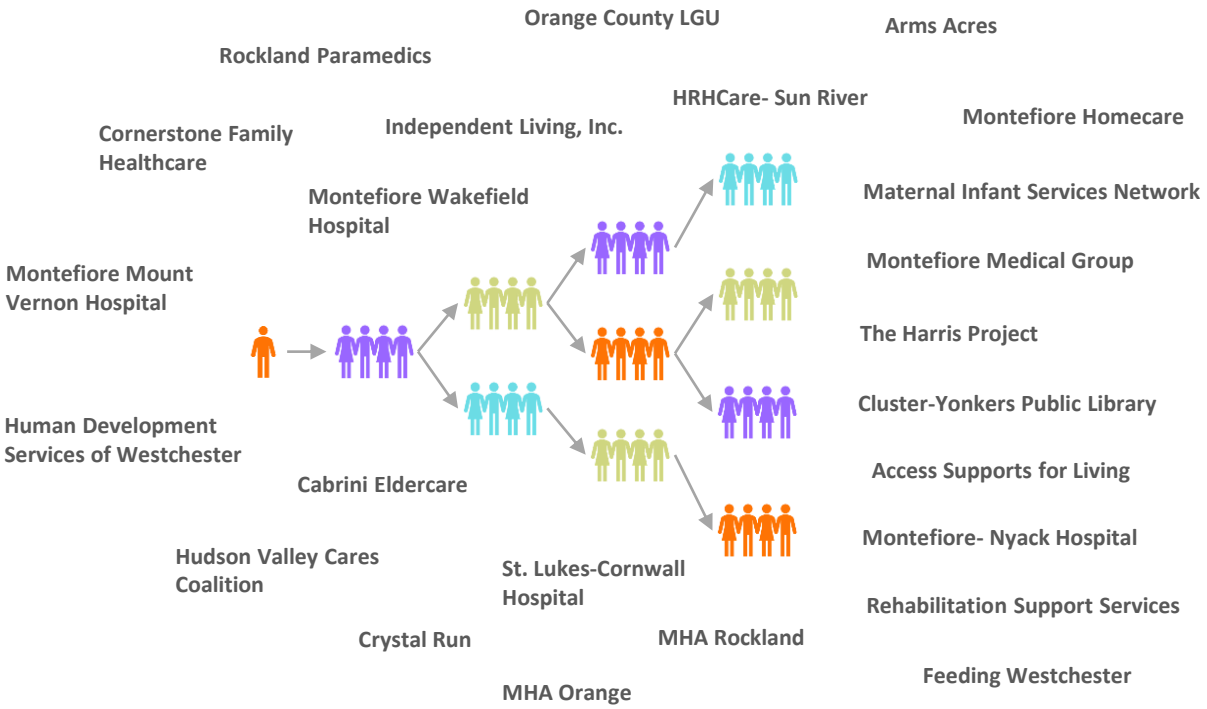
WMTY is easy to spread across institutions because it quickly gains momentum as clinicians and staff try it for themselves and feel the difference in their ability to connect and build effective partnerships with their patients.

As you and your organization work to implement WMTY into your workflows and organizational culture, we urge you to <u>be careful not to squash the movement, the momentum and the joy, that "asking, listening and doing" *what matters* can bring to your staff.</u> Our experience in a multitude of stakeholder partner organizations suggests that collecting stories of impact and celebrating the successes of WMTY implementation across team members is an effective strategy to build excitement and momentum for the spread of WMTY. While using data to drive improvement efforts is a valuable strategy for many quality metrics, when working with the clinical care teams on the ground, **be cautious about fixating on quantitative measures of success**. Instead, we suggest that empirics be monitored by your patient experience team behind the scenes, and not be used to hold staff accountable to numbers (e.g., the number of WMTY forms completed).

At some point along the WMTY implementation journey, the momentum gained from gratified individual staff members reaches a tipping point in which WMTY becomes ingrained into the organization's culture. Around that time, leadership report that the phrase "what matters to [staff member name or "us"] is. . . . . " becomes part of the lexicon used by staff and leadership to express what matters most to their patients, their team, their colleagues, and themselves. . . . and that is the wonder of being genuinely person-centered.

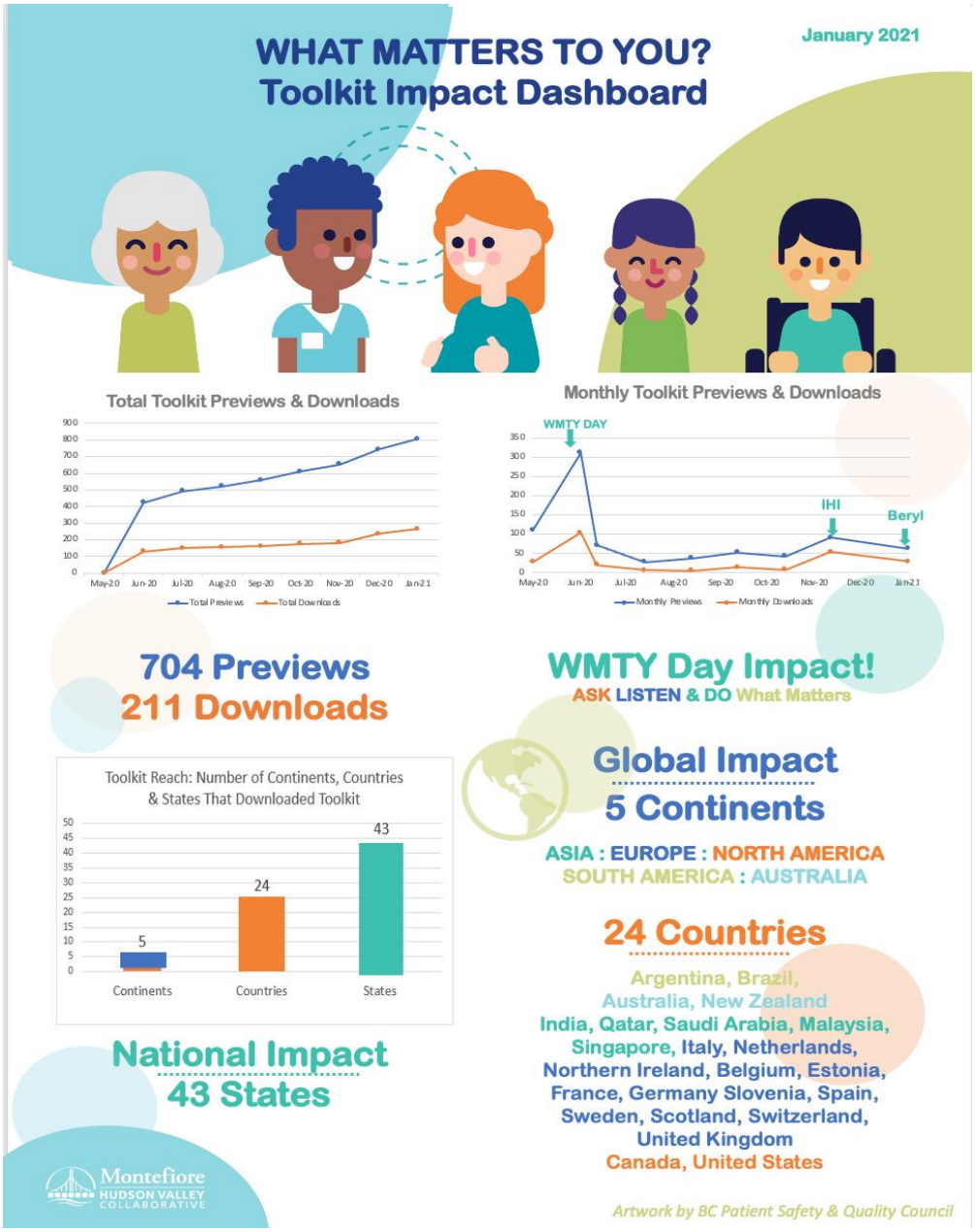
We wish you success in your WMTY implementation journey.

THE SPREAD OF THE WMTY MOVEMENT



THE WMTY MOVEMENT

International Spread



WMTY IMPLEMENTATION

Change Management

What is Change Management?

Change management encompasses the processes, tools and techniques needed to manage the people side of change and to achieve its required business outcomes. It is a facet of project management but focuses on the systematic management of employee engagement and adoption when the organization chooses to implement a change.

Successful Change Implementation

Prosci™, a change management organization, developed a change management system that provides the methodology needed for an organization to successfully prepare for change, manage change, and ultimately reinforce change to ensure sustainability. This system is centered around what they call the ADKAR Model, inclusive of the "5 Building Blocks for Successful Change." This change model outlines the necessary components needed for implementing and sustaining change through proper planning, communication, and employee support. To successfully apply ADKAR and implement sustaining change, an organization must embed the below building blocks, throughout their project implementation process.

- **AWARENESS** of the Need for Change
- **DESIRE** to Support the Change
- **KNOWLEDGE** of How to Change
- **ABILITY** to Demonstrate Skills & Behavior
- **REINFORCEMENT** to Make the Change Stick

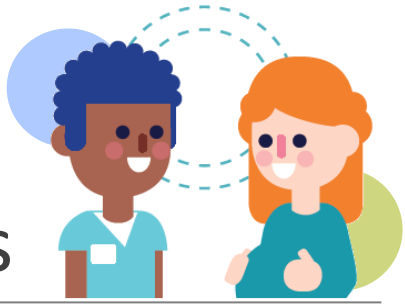
Change Management & WMTY

Throughout the implementation of your WMTY project, there will be opportunities for incorporation of the ADKAR change management model to allow you to properly prepare for, manage and reinforce WMTY implementation. Where applicable, the below icon will be displayed throughout the toolkit to highlight opportunities for incorporation of the ADKAR model. Tools to facilitate this process have also been included.

More information about Prosci™ and the ADKAR model can be found here.

WMTY IMPLEMENTATION

A Word on Kindness



Why are people taking about kindness in healthcare?

In parallel to the spread of WMTY as a global movement, there is a growing focus on the fundamental role of kindness in healthcare. This conversation and movement is repositioning kindness away from the "I know it is soft and fluffy, but it is important" to being front and central to the business of health care. This work is increasingly underpinned by research evidence that demonstrates the importance of kindness in improving outcomes for patients, and the experience of patients and staff. The links between kindness as a behavior and the leadership role of creating psychological safety in teams, in clinical environments and in organizations are also becoming increasingly clear.

Eight themes are emerging from the discussions:

- Leading for kindness – together we can grow kindness
- Kindness is a choice of action
- There is evidence that kindness leads to better outcomes
- Kindness is at the business end of healthcare
- Kindness links to (and leads to) so much else
- Challenging unkindness is a crucial part of the story
- Small acts of kindness can have a big impact
- Systems of care can be built around kindness

Kindness & WMTY

Perhaps unsurprisingly many of the key leaders, advocates and improvers supporting the global WMTY movement have been key influencers in the conversation for kindness in health and care, which is emerging as a parallel and linked movement. Asking 'what matters' is a fundamental action of kindness.

We have a strong collective commitment to grow and nourish the links between these two movements. If you would like to link up with the monthly conversation for kindness then please contact Dr Bob Klaber, a pediatrician in London, UK on bob.Klaber@nhs.net

WMTY IMPLEMENTATION

WMTY and Motivational Interviewing

The Spirit of Motivational Interviewing

WMTY aligns closely with "Spirit" of Motivational Interviewing - Compassion, Acceptance, Partnership and Evocation. Asking, Listening and Doing *What Matters* is an expression of compassion. It shows that you care, that you accept and understand where a person is, and that you are willing to come alongside and partner with the individual to design a care plan that works for them. The WMTY question is evocative because it "pulls out" from the individual what is most important for them.

What about when "What Matters" is not actionable?

Healthcare providers and staff may be concerned that they may learn that what matters is not something they themselves, can easily address or act on (i.e., learning that a person is being evicted from their home or that their child is using drugs.) This is where the MI skill of reflective listening fits in so nicely. Reflecting back to the person an understanding of how difficult it must be for them and acknowledging that controlling a chronic disease, although important, might not be their highest priority, meets the person where they are at and leads to stronger partnerships. Reflecting is Doing *what matters! A short training video by Dr. Gutnick that summarizes these concepts is available at this link.*

Ask
What Matters?

Listen
To What Matters

Actionable?

YES

Do
What Matters

NO

REFLECT
On What Matters

= **Doing**
What Matters

Motivational Interviewing

MI SPIRIT

Compassion
Acceptance
Partnership
Evocation

SKILLS

Open Ended Questions
Affirmations
Reflections
Summaries

Video link

*Gutnick DN, MINT Forum 2019

WMTY Impact

What is the impact of Asking WMTY?

Five years of WMTY data were collected from staff during WMTY day events at the Royal Free Hospital in London, UK, by Karen Turner and her team. Key findings demonstrating the impact of asking WMTY are summarized below

60-70% of the time	• Staff reported that they changed practice as a result of asking WMTY
70-80% of the time	• Staff reported that they learned something new when they asked WMTY
80-90% of the time	• Staff reported that “Asking WMTY” enhanced their conversation or connection with patients

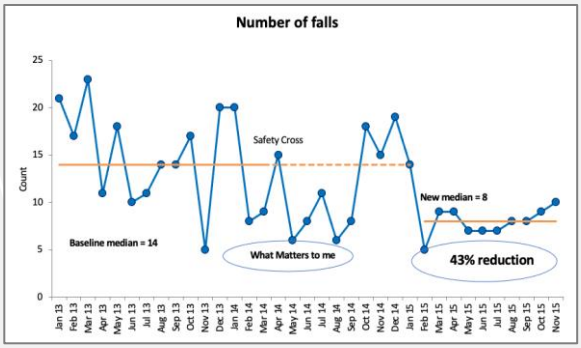
THE BUSINESS CASE

WMTY Impact

Asking, Listening and Doing *What Matters,* can impact patient and staff experience and outcomes, leading to improvements in care quality, staff experience and downstream cost savings. Here are two international examples that demonstrate the impact of asking WMTY to patients and staff.

Asking Geriatrics Patients WMTY*

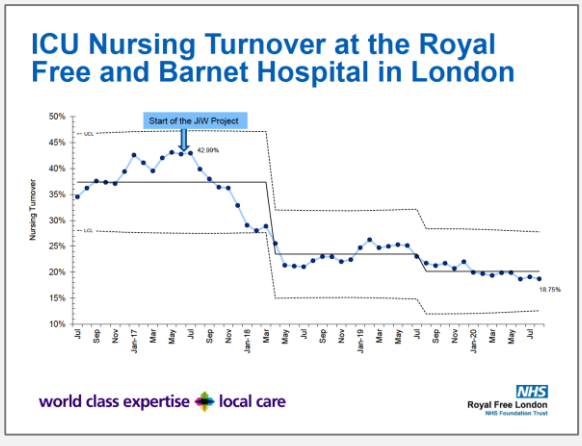
- Implemented WMTY into workflows in 4 geriatrics wards at Southern General Hospital Glasgow
- Asking, Listening and Doing *what mattered led to a 43% reduction of falls*
- 50% reduction in formal complaints across the 4 wards
- Nurses and staff reported that the work was meaningful and improved their interactions with patients and families



**Geraldine Marsh, is currently Associate Nurse Director , Western General Hospital Edinburgh*

Asking Nursing Staff WMTY

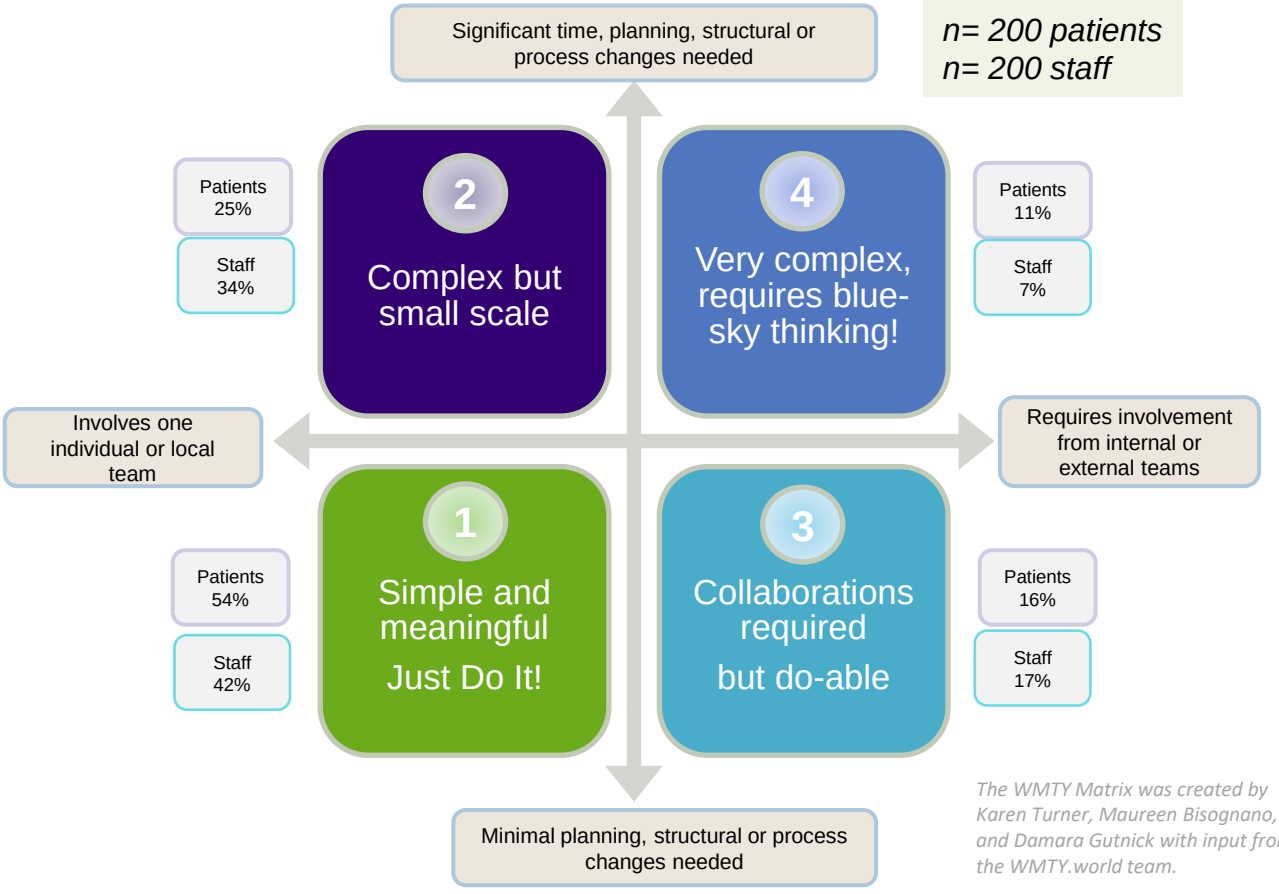
- Learning and responding to *what mattered* most to staff nurses yielded a 57% reduction in ICU nursing turnover at the Royal Free and Barnet Hospital in London
- Nurses valued having more control over their work schedules
- A new scheduling system was implemented that gave nurses the ability to select their own shifts



WMTY IMPLEMENTATION

Doing What Matters

Staff are sometimes reluctant to ask WMTY because they are concerned that *"what matters"* will not be actionable. At the Royal Free Hospital in London, Karen Turner and her team collected WMTY data from 200 patients and 200 staff and used the matrix below to categorize WMTY themes based on the effort needed to "Do" *what matters.* The good news is that based on early data, they found that most of the time, Doing WMTY is simple and meaningful.



The WMTY Matrix was created by Karen Turner, Maureen Bisognano, and Damara Gutnick with input from the WMTY.world team.

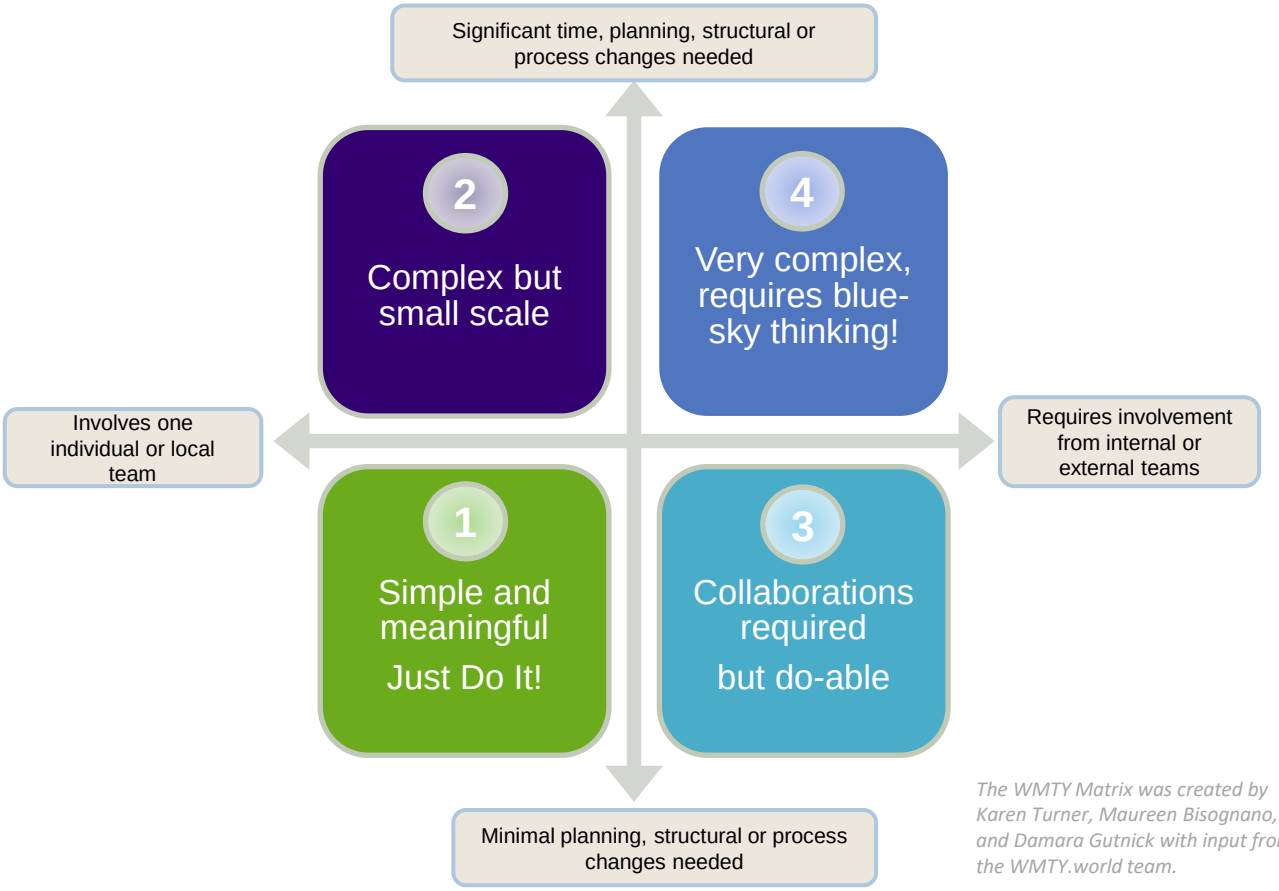
CALL TO ACTION: HELP US COLLECT SOME DATA

Doing What Matters

In your care setting, how frequently do WMTY responses fall into each quadrant? Click on the survey links below to share your data.

Individual Survey: Click this link to record your own personal WMTY experience data for patients, staff or others who were asked the question.

Team Survey: Click this link to report collated WMTY experience data collected by a care team who work in a specific care setting



The WMTY Matrix was created by Karen Turner, Maureen Bisognano, and Damara Gutnick with input from the WMTY.world team.

WMTY CONVERSATIONS

Top Tips

Tips to Honor What Matters Most to Patients and Incorporate Their Wishes into Care

Asking What Matters is for everyone. Build a culture that supports curiosity, person-centeredness, and action. Work across roles and teams to bring patients' requests to life.

Be vulnerable and approach the patient with curiosity and give it a go; ask even 1 patient ***"What matters to you right now?"*** The expectation is not to fix anything**. Most requests are achievable.**

Ask questions that spark conversation. Use open-ended questions that make the patient feel safe to give feedback and ideas to solve pain points.

Be present and authentic by actively listening and practicing empathy. Ask question(s) with patients and let them guide the conversation. Patients recognize authenticity when reflecting on their experience.

Show that you are listening; Make an action plan. Incorporate your patients' feedback into their plan of care. If you are unable to act on the request, explain why.

Close the loop. Share with the patient the action that you and the team are taking. Demonstrate that they are part of the decision-making team and when to expect action.

Learn and iterate. Reflect with the care team to learn if knowing What Matters changed the way that they delivered care. Are there **common themes** that patients report matter most? How might we anticipate patient needs and address them before?

Patient Reported Requests:

To be:

- Included
- Respected
- Heard
- Clearly Communicated With
- Given a plan
- Supported
- In control

Inspiration taken from:
www.whatmatterstoyou.scot

www.ihi.org

https://bcpsqc.ca/advance-the-patient-voice/what-matters-to-you/

https://montefiorehvc.org/what-matters-to-you/

www.wmty.world

How to Use This Toolkit

Overview

This implementation guide is intended to help you organize and carry out all activities involved in successfully launching "What Matters to You?" It combines project management principles, the technical side of change, and change management principles, the people side of change, to help your organization with successful WMTY implementation. All supporting resources, including tools and templates, have been provided for completion of each phase of your WMTY project. The two tracks – Patient Experience and Staff Engagement – facilitate the development of projects customized to organizational and individual perspectives and ensure broader benefit realization by all stakeholders, patients and staff.

Once your organization has selected a WMTY implementation track, complete the steps in the Project Initiation Phase and move forward with completion of the steps for each track. To easily facilitate this process, the implementation guide has been split into the below sections, preceding each section are process maps illustrating the flow between the steps in each phase (**click on each process step box** or **utilize** the **navigator** at the bottom of each page, **to easily navigate the toolkit**).

- **Project Initiation Phase**
- **Patient Experience Track**
- **Staff Engagement Track**

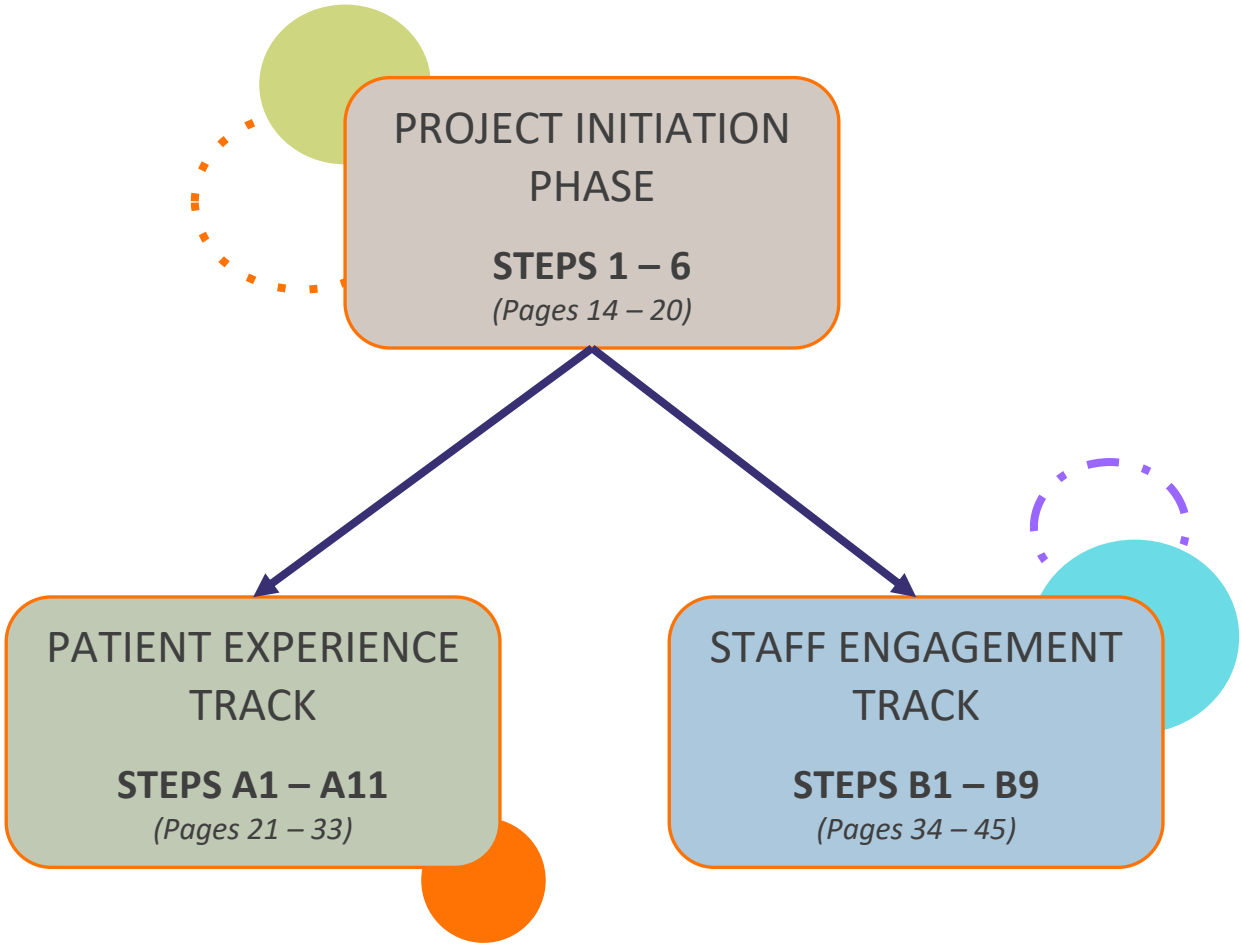
Guidance Sheet Outline

For each step in the process, the implementation guide provides a corresponding guidance sheet. Outlined below is a description of each section and the information they will provide:

- **Goals**
  - This section lists the goals associated with completion of each step. By the end of each step, you should have accomplished all of the goals listed.
- **Completion Tips**
  - Through best practices and lessons learned acquired through partner pilot implementations of WMTY, MHVC has aggregated a list of tips and things to remember when completing each step, those can be found in this section.
- **Tools**
  - MHVC has developed and acquired tools that can be used to facilitate completion of each step in the project. The tools are listed and hyperlinked in this section for your organization to utilize as needed.
- **Level of Effort**
  - This sections lists an estimated level of effort for completion of each step. Please note, this will vary depending on the scope and scale or your organization's WMTY project.

MHVC WMTY IMPLEMENTATION FRAMEWORK

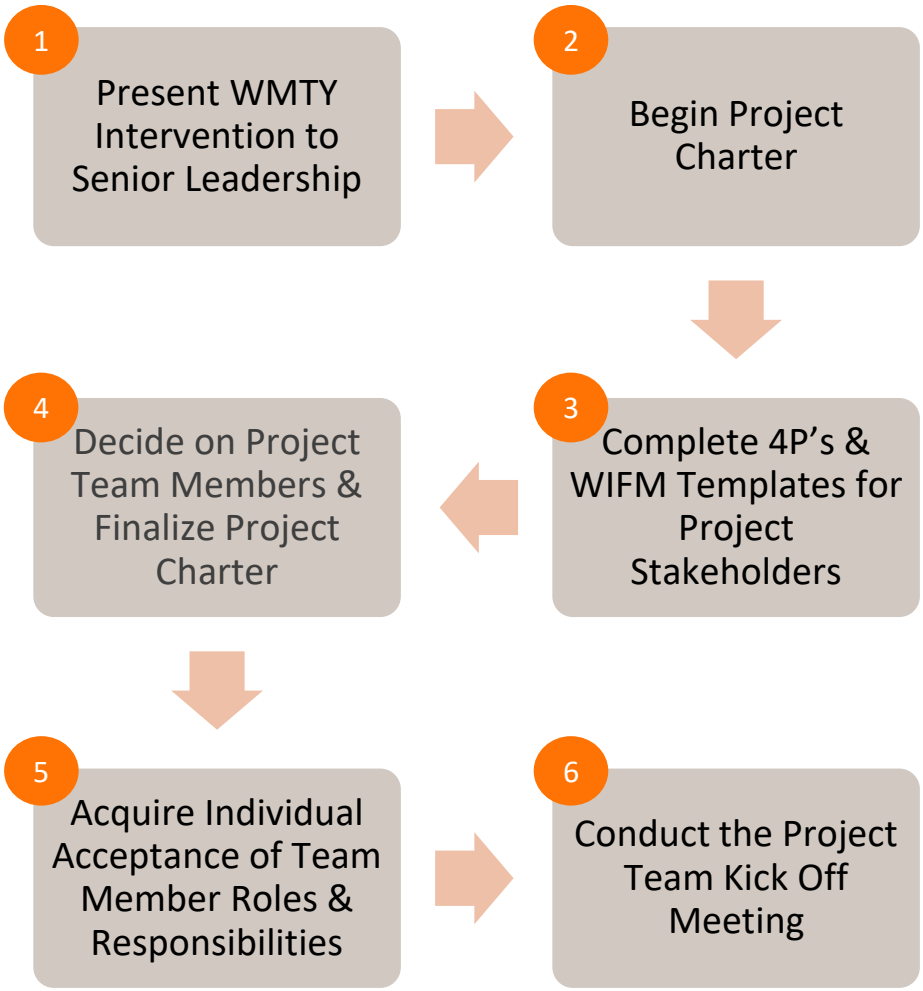
Navigating the Toolkit: Based on your selected implementation track, use the images below to navigate to the applicable pages, starting with the Project Initiation Phase. Clicking on a box will bring you to the specific guidance materials and resources for each step.



MHVC WMTY IMPLEMENTATION FRAMEWORK

Project Initiation Phase

Navigating the Toolkit: Clicking on a box will bring you to the specific guidance materials and resources for each step.



1: Present WMTY Intervention to Senior Leadership

GOALS

- ✓ Obtain leadership commitment to begin the WMTY project
- ✓ Identify the Project Sponsor
- ✓ Identify the Project Champion

COMPLETION TIPS

- ❑ Emphasize the simplicity of **"asking," "listening"** and **"doing"** what matters.
- ❑ Patient Experience Track: Share that WMTY implementation involves integrating a simple evocative question into current workflows, using active listening, and creating care plans that meet patients where they are at.
- ❑ Staff Engagement: Emphasize that asking staff about what matters to them can uncover opportunities to increase staff engagement, joy in work, and retention
- ❑ Showcase measure gaps, targets & penalties (HCAHPS, Press Ganey, etc.) to demonstrate Return on Investment (ROI).
- ❑ Gauge level of leadership commitment towards WMTY implementation: Pilot implementation vs. acculturation across organization

TOOLS

- ❑ WMTY Overview PowerPoint *(Overview slide deck for leadership presentations)*
- ❑ WMTY Ted Talk Video *(An inspirational 10-minute Ted Talk by Jason Leitch, Clinical Director Scottish NHS, that introduces WMTY as a new vital sign)*
- ❑ Sizzle Reels *(Videos: Short WMTY Case Examples)*
- ❑ *Ask, Listen, and Do What Matters Videos (British Columbia's video series providing quick tips and examples for integration WMTY into practice)*
- ❑ WMTY Case Studies *(WMTY success stories & testimonials from MHVC partner organizations)*
- ❑ WMTY Literature Review *(Annotated literature review prepared by MHVC)*
- ❑ Shared Decision Making *(Full Article: "Shared Decision Making – The Pinnacle of Patient-Centered Care", New England Journal of Medicine, March 2012)*

LEVEL OF EFFORT

LOW

2: Begin Project Charter

GOALS

- ✓ Align WMTY with strategic organizational goals
- ✓ Define project scope and key objectives
- ✓ Hone-in on your target patient and/or staff population
- ✓ Identify Project Stakeholders

COMPLETION TIPS

- ❑ Co-develop the project charter: should be completed by both the Project Sponsor & Project Champion
- ❑ Use the project charter to guide future conversations about the value & intent of the project
- ❑ Define problem statement, SMART goal statement, business case/opportunity statement (HCAPS & Press Ganey), & High-Level Timeline
- ❑ Outline high-level budget (project resources & cost for patient/staff materials)
- ❑ Review your organizational data to define target patients and/or staff population
- ❑ Identify stakeholders to inform project team selection & communication (For Staff Engagement: Ensure inclusion of managers, directors and new-hires as participants)

TOOLS

- ❑ Project Charter Template (*A central document that defines the fundamental information about a project and is used to authorize it)*
- ❑ Completed Project Charter Example *(A WMTY project charter example)*

LEVEL OF EFFORT

LOW

3: Complete 4 Ps and WIFM Templates for Project Stakeholders

GOALS

✓ Define the change and the direct stakeholder impact

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter
- ❑ 4 Ps: *Project, Purpose, Particulars, People* – Define what (change description and particulars), why (purpose), and who (impacted groups)
- ❑ WIFM – *What's in it for Me* – Delineate benefits for individual stakeholder groups
- ❑ Revise the project charter as roles are further defined, this will be the 1st iteration
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Awareness:* This step gives you the opportunity to increase your stakeholders' awareness of WMTY through the completion of the 4Ps & WIFM worksheets. This can later be used for staff communication about the changes to come and how it will impact their daily work.
  - ❑ *Desire:* This step gives you the opportunity to increase your staff's desire to support and implement this change by answering the question, "What's in it for me?"

TOOLS

- ❑ 4 Ps Template and 4Ps Completion Guide *(Allows you to make the connections between the project, the intended outcomes, the specific changes and the individuals and groups who must adopt the change)*
- ❑ WIFM Template and WIFM Completion Guide *(Analysis that helps you identify and understand the needs and attitudes of all stakeholders; you get a better idea of how to manage their reactions to the change initiative)*

LEVEL OF EFFORT

LOW

4: Decide on Project Team Members & Finalize Project Charter

GOALS

- ✓ Identify Project Team Members
- ✓ Define roles and responsibilities
- ✓ Finish & acquire sponsor approval of the project charter

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, 4Ps, WIFM
- ❑ Identify your WMTY Implementation Team – Identify your project team members based on bandwidth and ability to fulfill roles & responsibilities as defined
- ❑ Identify Time Commitment – Be clear if there will be a removal of some work for team members or if they are expected to handle this on top of their existing work
- ❑ Include day/night shift workers as applicable
- ❑ Add project team member names to the project charter once solidified
- ❑ Finalize and acquire sponsor approval of project charter to initiate project

TOOLS

- ❑ Roles & Responsibilities Template *(A formal way of defining each role on the project team and their associated responsibilities)*
- ❑ Project Charter Template and Example *(A central document that defines the fundamental information about a project and is used to authorize it)*

LEVEL OF EFFORT

MEDIUM

5: Acquire individual acceptance of team member roles & responsibilities

GOALS

✓ Get confirmation of team member role acceptance

COMPLETION TIPS

- ❑ Acquire Inputs: Roles & Responsibilities, WIFM
- ❑ Communicate roles and responsibilities to each team member: Team members need to understand what they are committing to. Once they understand and agree to take on this role, this will increase overall project engagement. This can be done individually or within small group sessions.
- ❑ Complete this prior to the kickoff meeting to reduce resistance in that meeting
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Awareness:* This step gives you the opportunity to increase your stakeholders' awareness of the WMTY project. Give them a brief overview of WMTY, the benefits, and describe WIFM for each stakeholder. Finally get their commitment to making this initiative come to fruition.
  - ❑ *Desire:* This step gives you the opportunity to increase your staff's desire to support and implement this change.

TOOLS

- ❑ Roles & Responsibilities Template *(A formal way of defining each role on the project team and their associated responsibilities)*

LEVEL OF EFFORT

MEDIUM

6: Conduct the Project Team Kick Off Meeting

ADKAR

GOALS

- ✓ Provide project overview & benefits
- ✓ Share roles & expectations
- ✓ Define governance structure

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, 4 Ps, WIFM, Roles & Responsibilities
- ❑ Attended by both the Project Sponsor & Project Champion
- ❑ Provide a WMTY overview and go through each of the input documents listed above (can be shared directly or compiled at a high level into a PowerPoint Presentation)
- ❑ Get commitment for regular meeting cadence
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Awareness:* This step gives you the opportunity to increase your stakeholders' awareness of the WMTY project. Give them a brief overview of WMTY, the benefits, and describe WIFM for each stakeholder. Finally get their commitment to making this initiative come to fruition.
  - ❑ *Desire:* This step gives you the opportunity to increase your staff's desire to support and implement this change.

TOOLS

- ❑ WMTY Overview PowerPoint *(WMTY overview slide deck for leadership presentations)*
- ❑ WMTY Ted Talk Video *(An inspirational 10-minute Ted Talk by Jason Leitch, Clinical Director Scottish NHS, that introduces WMTY as a new vital sign)*
- ❑ Sizzle Reels *(Videos: Short WMTY Case Examples)*
- ❑ WMTY Case Studies *(WMTY success stories & testimonials from MHVC partner organizations)*
- ❑ *Ask, Listen, and Do What Matters Videos (British Columbia's video series providing quick tips and examples for integration WMTY into practice)*

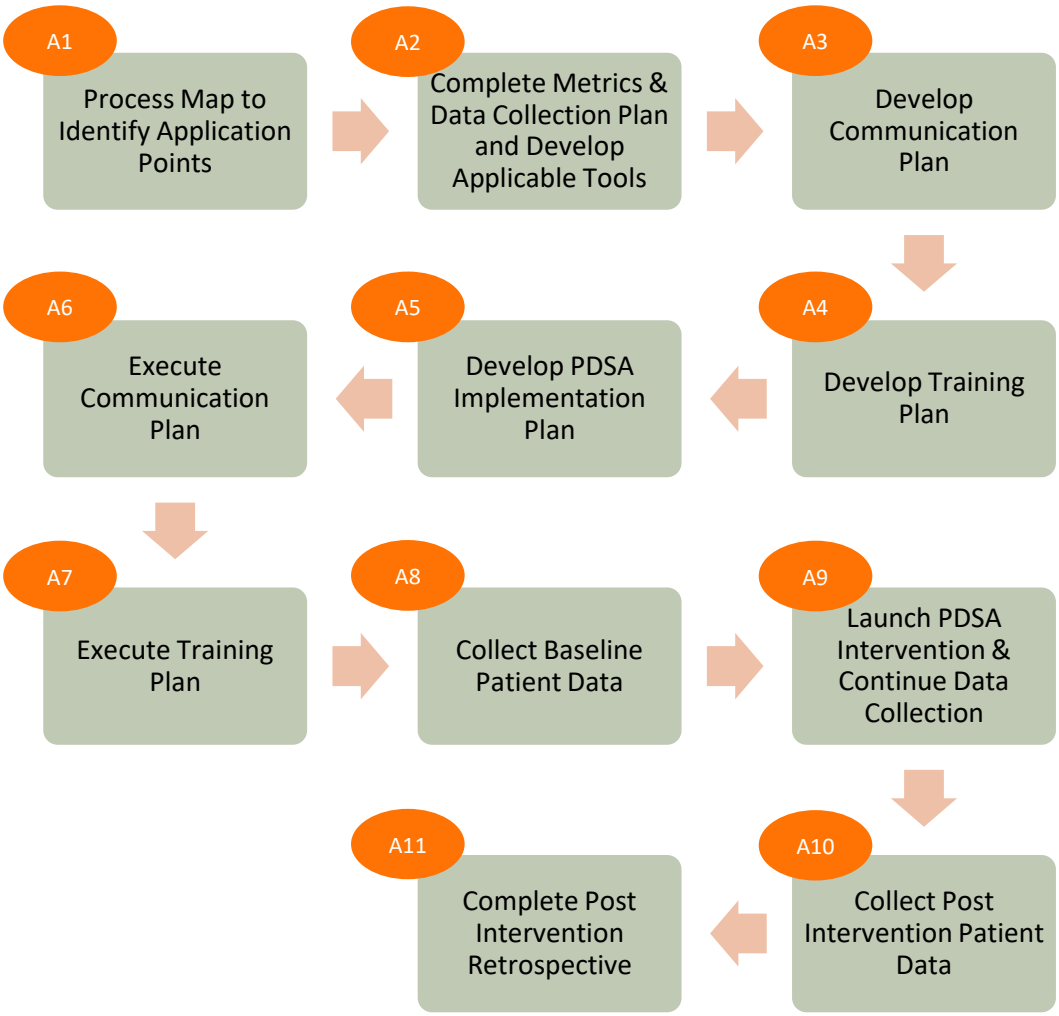
LEVEL OF EFFORT

MEDIUM

MHVC WMTY IMPLEMENTATION FRAMEWORK

Patient Experience Track

Navigating the Toolkit: Clicking on a box will bring you to the specific guidance materials and resources for each step.



*Repeat steps A5 and A9 – A11 as necessary to complete PDSA cycles

A1: Process Map to Identify Application Points

GOALS

✓ Map the current state and identify opportunities for WMTY integration within the target population across the organization or department of choice

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, 4Ps
- ❑ Map current state
- ❑ Identify WMTY application points
- ❑ Incorporate WMTY into workflow to show ideal state
- ❑ Identify optimal application points based on “best timing” for patients & staff
- ❑ Acquire leadership acceptance of ideal state before proceeding

TOOLS

- ❑ Process Map Guide *(A process map is a planning and management tool that visually describes the flow of work.)*
- ❑ Process Map Examples *(Fully completed process map examples)*

LEVEL OF EFFORT

MEDIUM

A2: Complete Metrics & Data Collection Plan and Develop Applicable Tools

GOALS

- ✓ Define the project measures that will be used to demonstrate improvements
- ✓ Develop plan and applicable tools for collecting and monitoring data

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, Process Map, Roles & Responsibilities
- ❑ Identify process & outcomes-based measures and create plans for the collection of data.
- ❑ Consider leveraging pre-existing dashboards (e.g. HCAHPS), data collection tools, and processes, whenever possible. Create new ones if needed (a Patient WMTY Rounding Tool has been created to facilitate data collection)
- ❑ Remember, be careful not to "squash the movement." WMTY builds momentum by fostering staff desire and excitement. Because doing meaningful work is associated with more "joy in work, we suggest that qualitative stories of impact be shared broadly to drive staff adoption, while collection of project data and results, initially be visible only to leadership and the project team members as behind the scenes measures of success.

TOOLS

- ❑ Metrics & Data Collection Plan Template *(This is a well thought out approach to collecting data; it includes where to collect data, how to collect it, when to collect it and who will do the collecting. This plan is prepared for each measure.)*
- ❑ Patient WMTY Rounding Tool *(Tracks individual patient responses to WMTY questions while on rounds, measures WMTY process implementation and patient experience)*

LEVEL OF EFFORT

MEDIUM

A3: Develop Communication Plan

GOALS

✓ Outline how the WMTY effort will be communicated across all stakeholders (Patients & Staff)

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, 4 P's, WIFM, Roles & Responsibilities, Metrics & Data Collection Plan
- ❑ Define the who, what, when, how often, and how for all project communications
- ❑ Identify what messages need to be shared during the project timeframe to ensure project success
- ❑ Ensure that all stakeholders are well informed throughout the project and that they receive the right information, in the right way, at the right time (meeting with high level stakeholders to ensure they are informed and invested may be helpful)
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Awareness:* This step gives you the opportunity to increase your stakeholders' awareness of the WMTY project. Ensure that they receive the right information about the project and its ongoing activities to increase awareness and engagement.
  - ❑ *Desire:* This step gives you the opportunity to increase your staff's desire to support and implement this change.

TOOLS

- ❑ Communication Plan Template and Completion Guide *(This is a detailed strategy that outlines an organization's target audiences and the messages they need to receive to drive desired outcomes)*

LEVEL OF EFFORT

MEDIUM

A4: Develop Training Plan

GOALS

✓ Develop plan to train all identified stakeholders

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, 4P's, WIFM, Process Map
- ❑ Finalize training curriculum and use a train-the-trainer model to ensure sustainability
- ❑ Decide on the training forum, ongoing frequency (include a plan for new hires) and cater training around existing meeting structures
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Knowledge:* In this step, you are teaching your staff "how" to implement WMTY. This step is about supplying the knowledge, understanding, and the tools necessary for your team to successfully adopt this change and do their jobs successfully.

TOOLS

- ❑ Training Planning Template *(Includes 2 standard training curriculums and helps the project team define trainers, trainees, forums, timeframes, etc. for training execution)*
- ❑ Training Slide Decks: 30 Minutes & 60 Minutes *(Includes a WMTY overview, a review of the WMTY methodology, and group work/role-playing for practicing WMTY in both a 30-minute and 60-minute format)*
- ❑ WMTY Training Handouts *(Includes the WMTY bubble sheet and the WMTY story board template)*

LEVEL OF EFFORT

MEDIUM

A5: Develop PDSA Implementation Plan

GOALS

- ✓ Create a roadmap for WMTY implementation
- ✓ Plan out the necessary project PDSA cycles needed to fully implement WMTY

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, Process Map, Roles & Responsibilities,
- ❑ Plan, Do, Study, Act (PDSA) cycles – This is a 4-step methodology used to adequately plan, implement, evaluate, and improve changes in small, rapid-cycle increments
- ❑ Create PDSA cycles to test and implement your WMTY ideal state workflows
- ❑ Assign roles, responsibilities & deadlines
- ❑ Ensure the right stakeholders are involved in the planning process to reduce barriers and resistance to PDSA implementation

TOOLS

- ❑ PDSA Implementation Plan Template *(Guides you through each PDSA phase by asking the necessary questions needed to plan, implement, evaluate, and decide on the next steps for each cycle of your WMTY project)*

LEVEL OF EFFORT

MEDIUM

A6: Execute Communication Plan

GOALS

✓ Execute WMTY communications as outlined in the communications plan

COMPLETION TIPS

- ❑ Acquire Inputs: Communication Plan
- ❑ Reinforce completion of each communication as outlined in the plan (ensure adherence)
- ❑ Stick to communication plan as outlined and adjust as needed; failure to keep communication can reduce staff engagement
- ❑ Follow-up at huddles & other defined communication forums
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Awareness:* This step gives you the opportunity to increase your stakeholders' awareness of the WMTY project. Ensure that they receive the right information about the project and its ongoing activities to increase awareness and engagement.
  - ❑ *Desire:* This step gives you the opportunity to increase your staff's desire to support and implement this change.

TOOLS

- ❑ Communication Plan Template and Completion Guide *(This is a detailed strategy that outlines an organization's target audiences and the messages they need to receive to drive desired outcomes)*

LEVEL OF EFFORT

MEDIUM

A7: Execute Training Plan

GOALS

✓ Execute WMTY training as outlined in the training plan

COMPLETION TIPS

- ❑ Acquire Inputs: Training Plan
- ❑ Ensure all stakeholders are trained and/or aware of the WMTY initiative and know how to execute their responsibilities in the project
- ❑ Administer training evaluations that include questions on employee readiness & engagement (Baseline for future tracking)
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Knowledge:* In this step, you are teaching your staff "how" to implement WMTY. This step is about supplying the knowledge, understanding, and the tools necessary for your team to successfully adopt this change and do their jobs successfully.

TOOLS

- ❑ Training Planning Template *(Includes 2 standard training curriculums and helps the project team define trainers, trainees, forums, timeframes, etc. for training execution)*
- ❑ Training Slide Decks: 30 Minutes & 60 Minutes *(Includes a WMTY overview, a review of the WMTY methodology, and group work/role-playing for practicing WMTY in both a 30-minute and 60-minute format)*
- ❑ WMTY Training Handouts *(Includes the WMTY bubble sheet and the WMTY story board template)*

LEVEL OF EFFORT

MEDIUM

A8: Collect Baseline Patient Data

GOALS

✓ Collect pre-implementation baseline patient data to later understand program impact

COMPLETION TIPS

- ❑ Acquire Inputs: Metrics & Data Collection Plan
- ❑ Incorporate data collection into an existing workflow, rather than creating a new workflow for data collection.
- ❑ To strengthen patient engagement, if data is collected via patient interviews, make sure to frame the context and "why" you are asking.
- ❑ This data should be collected by one of the project team members or another department leader and not by staff members responsible for asking WMTY to the patients in the PDSA
- ❑ Remember, be careful not to "squash the movement." WMTY builds momentum by fostering staff desire and excitement. Because doing meaningful work is associated with more "joy in work, we suggest that qualitative stories of impact be shared broadly to drive staff adoption, while collection of project data and results, initially be visible only to leadership and the project team members as behind the scenes measures of success.

TOOLS

- ❑ Patient WMTY Rounding Tool *(Tracks individual patient responses to WMTY questions while on rounds, measures WMTY process implementation and patient experience)*

LEVEL OF EFFORT

MEDIUM

A9: Launch PDSA Intervention & Continue Data Collection

ADKAR

GOALS

- ✓ Launch WMTY PDSA as outlined in the PDSA implementation plan
- ✓ Continue data collection

COMPLETION TIPS

- ❑ Acquire Inputs: PDSA Implementation Plan, Process Map, Metrics & Data Collection Plan, Communication Plan
- ❑ Reinforce project implementation through ongoing support, coaching, and communication
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Ability:* This step gives your staff the opportunity to apply and demonstrate what they have learned into practice. As your team implements WMTY, support them through continued coaching to enhance skills and engagement.

TOOLS

- ❑ PDSA Implementation Plan Template *(Guides you through each PDSA phase by asking the necessary questions needed to plan, implement, evaluate, and decide on the next steps for each cycle of your WMTY project)*
- ❑ Patient WMTY Rounding Tool *(Tracks individual patient responses to WMTY questions while on rounds, measures WMTY process implementation and patient experience)*
- ❑ Patient WMTY Bubble Sheet *(Tool used to document WMTY, place completed sheets above the patient's bed for all staff to see)*
- ❑ Patient Room WMTY White Board Example *(An example of WMTY incorporated into Patient Room White Boards)*
- ❑ Patient WMTY Wallet Cards *(Tool used to document WMTY, patients complete this and take it with them throughout their continuum of care)*

LEVEL OF EFFORT

MEDIUM

A10: Collect Post-Intervention Patient Data & Complete Data Analysis

GOALS

- ✓ Collect post intervention data
- ✓ Analyze data to understand program impact and gap to goal on defined project measures

COMPLETION TIPS

- ❑ Acquire Inputs: Metrics & Data Collection Plan, Patient WMTY Rounding Tool
- ❑ Aggregate baseline and post-intervention data
- ❑ Analyze data and identify key findings and improvement areas

TOOLS

- ❑ Patient WMTY Rounding Tool *(Tracks individual patient responses to WMTY questions while on rounds, measures WMTY process implementation and patient experience)*
- ❑ goShadow Resources *(Free survey templates and tools to collect, analyze, and aggregate patient experience data)*

LEVEL OF EFFORT

MEDIUM

A11: Complete Post Intervention Retrospective

GOALS

- ✓ Review intervention data
- ✓ Collect feedback to define next steps for refinement, adoption, and/or spread

COMPLETION TIPS

- ❑ Acquire Inputs: Patient Experience Data Analysis and stakeholder feedback
- ❑ Ensure a safe space if created for staff to provide open and honest feedback without the risk of retaliation and reprimands
- ❑ Facilitate a discussion that extracts the PDSA successes and improvement areas
- ❑ Define forum for retrospective information gathering (use existing forums where possible)
- ❑ Document and address key findings - The project sponsor and champion should work to remove barriers and impediments identified in the retrospective sessions
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Ability:* This gives the project champion and/or trainer(s) the opportunity as a coach to listen to staff that have practiced the change, gather their feedback and provide targeted ongoing training and support to improve skills, engagement and overall sustainability.

TOOLS

- ❑ Retrospective Questionnaire *(List of questions used to facilitate a post intervention discussion with project stakeholders to identify successes and areas of opportunity)*

LEVEL OF EFFORT

LOW

GOALS

- ✓ Provide continuous awareness of initiative and its goals
- ✓ Collect and analyze implementation feedback
- ✓ Diagnose gaps, manage resistance, implement corrective actions
- ✓ Celebrate success to drive continuous improvement

COMPLETION TIPS

- ❑ The final change management principle, *reinforcement,* is an ongoing support process to sustain change through continued awareness, information sharing, coaching and celebration of successes. Below are reinforcement strategies to support ongoing communication and engagement.

COMMUNICATION

- ❑ Monitor continuous execution of communication plan
- ❑ Conduct Team Huddles (Weekly and/or Daily) – Ask what's working well, not working, identify and remove barriers
- ❑ Conduct Executive Huddles – Conduct leadership check-ins & presentation on project efforts and impact to maintain investment at the top level
- ❑ Advertise WMTY across the organization

ENGAGEMENT

- ❑ Document & share wins (i.e. Newsletter)
- ❑ Share patient & staff stories (sizzle reels)
- ❑ Participate in the National WMTY Day on June 6th
- ❑ Maintain governance structure (i.e. Meetings, trainings, etc.)
- ❑ Distribute WMTY Swag (I.e. Glasses, Buttons, ID Tags, etc.)

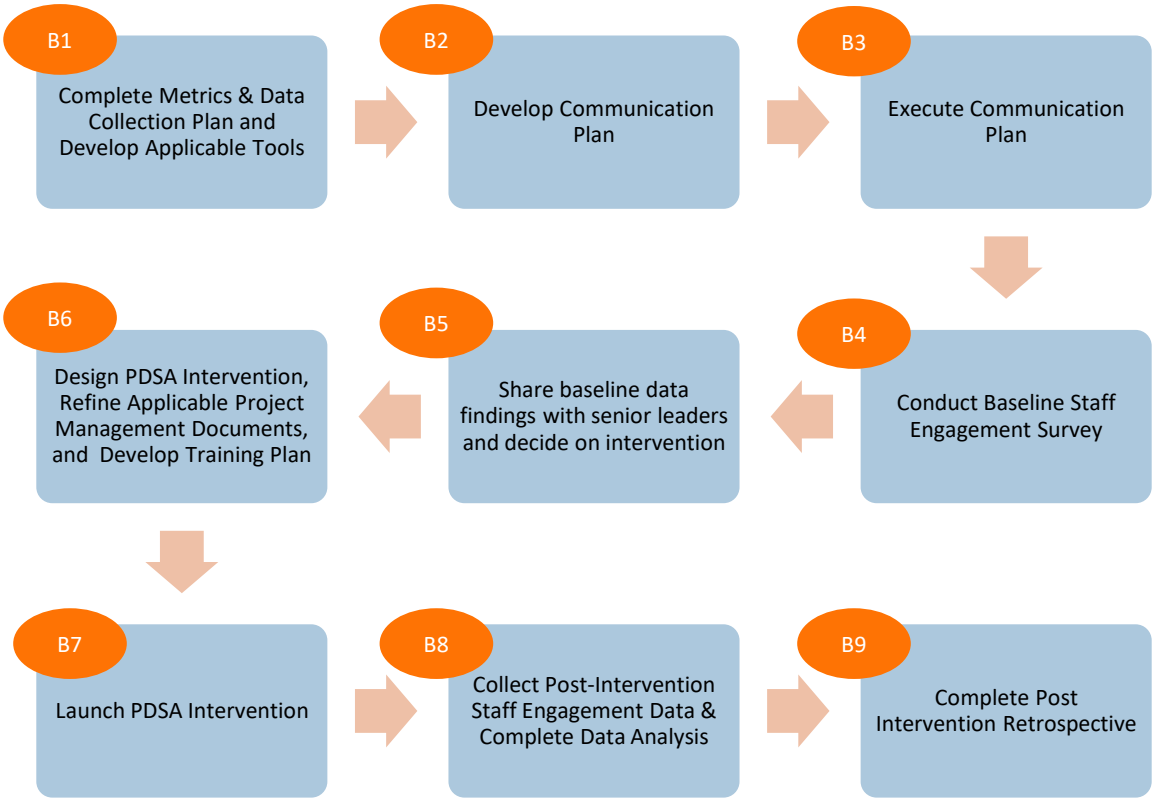
TOOLS

- ❑ WMTY Advertising Materials *(Templates for flyers, graphics, etc.)*
- ❑ Sizzle Reels *(Videos: Short WMTY Case Examples)*
- ❑ WMTY Day Materials *(Join in on the International WMTY Day, this year it will be on June 9th – Included: Celebration Ideas Webinar: Audio and Slide Deck)*
- ❑ WMTY Swag Ideas *(I.e. Glasses, Buttons, ID Tags, etc.)*

MHVC WMTY IMPLEMENTATION FRAMEWORK

Staff Engagement Track

Navigating the Toolkit: Clicking on a box will bring you to the specific guidance materials and resources for each step.



*Repeat steps B6 - B9 as necessary to complete PDSA cycles

B1: Complete Metrics & Data Collection Plan and Develop Applicable Tools

GOALS

- ✓ Define the project measures that will be used to demonstrate improvements
- ✓ Develop plan and applicable tools for collecting and monitoring data

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, Process Map, Roles & Responsibilities
- ❑ Develop process-based and outcomes-based measures and create plans for collection of the data
- ❑ Decide on forum for collecting staff engagement data, examples can include: Team Building Sessions, Town Halls, Department Meetings, Surveys, Suggestion Boxes, etc.
- ❑ Ensure anonymity (i.e. anonymous survey) and create a space for employees to provide open and honest feedback without the risk of retaliation
- ❑ Consider utilizing existing organization staff forums and assessments to collect data
- ❑ Decide on frequency of data collection
- ❑ If conducting a survey, develop process to reinforce/follow-up on staff completion of survey
- ❑ Identify existing tools for data collection or create tools for data collection as needed (see Staff engagement survey template for potential survey questions)

TOOLS

- ❑ Metrics & Data Collection Plan Template *(This is a well thought out approach to collecting data; it includes where to collect data, how to collect it, when to collect it and who will do the collecting. This plan is prepared for each measure.)*
- ❑ Staff Engagement Survey *(Survey questions to assess staff engagement, burnout, and joy in work)*
- ❑ IHI Joy in Work Framework *(White paper – IHI's 4-step approach to improving staff joy in work)*
- ❑ IHI Joy in Work Course *(IHI's 12-week web course on finding and creating joy in work and turning staff burnout into engagement)*

LEVEL OF EFFORT

MEDIUM

B2: Develop Communication Plan

GOALS

✓ Outline how the WMTY effort will be communicated across all stakeholders (Patients & Staff)

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, 4 P's, WIFM, Roles & Responsibilities, Metrics & Data Collection Plan
- ❑ Define the who, what, when, how often, and how for all project communications
- ❑ Define what messages need to be shared during the project timeframe to ensure project success
- ❑ Ensure that all stakeholders are well informed throughout the project and that they receive the right information, in the right way, at the right time (meeting with high level stakeholders to ensure they are informed and invested may be helpful)
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Awareness:* This step gives you the opportunity to increase your stakeholders' awareness of the WMTY project. Ensure that they receive the right information about the project and its ongoing activities to increase awareness and engagement.
  - ❑ *Desire:* This step gives you the opportunity to increase your staff's desire to support and implement this change.

TOOLS

- ❑ Communication Plan Template and Completion Guide *(This is a detailed strategy that outlines an organization's target audiences and the messages they need to receive to drive desired outcomes)*

LEVEL OF EFFORT

MEDIUM

B3: Execute Communication Plan

GOALS

✓ Execute WMTY communications as outlined in the communications plan

COMPLETION TIPS

- ❑ Acquire Inputs: Communication Plan
- ❑ Reinforce completion of each communication as outlined in the plan (ensure adherence)
- ❑ Stick to communication plan as outlined and adjust as needed; failure to keep communication can reduce staff engagement
- ❑ Follow-up at huddles & other defined communication forums
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Awareness:* This step gives you the opportunity to increase your stakeholders' awareness of the WMTY project. Ensure that they receive the right information about the project and its ongoing activities to increase awareness and engagement.
  - ❑ *Desire:* This step gives you the opportunity to increase your staff's desire to support and implement this change.

TOOLS

- ❑ Communication Plan Template and Completion Guide *(This is a detailed strategy that outlines an organization's target audiences and the messages they need to receive to drive desired outcomes)*

LEVEL OF EFFORT

MEDIUM

B4: Conduct Baseline Staff Engagement Assessment

GOALS

✓ Collect pre-implementation baseline staff data to inform intervention and later understand program impact

COMPLETION TIPS

- ❑ Acquire Inputs: Metrics & Data Collection Plan
- ❑ This assessment is centered around **asking your staff about what matters most to them**, and what they need to best engage in their work and do their jobs well. Identifying the "little pebbles" in their shoes can help guide improvement work leading to more joy in work and reduced burnout
- ❑ Remember that the forum for assessing staff engagement can include: Team Building Sessions, Town Halls, Department Meetings, Surveys, Suggestion Boxes, etc.
- ❑ Ensure anonymity (i.e. anonymous survey) and create a space for employees to provide open and honest feedback without the risk of retaliation
- ❑ Consider utilizing existing organizational staff forums and assessments to collect data
- ❑ Decide on frequency of data collection
- ❑ If conducting a survey, develop process to reinforce/follow-up on staff completion of survey
- ❑ Ensure adequate documentation of all baseline assessment results

TOOLS

- ❑ Staff Engagement Survey Template *(Survey questions to assess staff engagement, burnout, and joy in work)*
- ❑ goShadow Resources *(Free survey templates and tools to collect, analyze, and aggregate staff engagement data)*
- ❑ IHI Joy in Work Framework *(White paper – IHI's 4-step approach to improving staff joy in work)*
- ❑ IHI Joy in Work Course *(IHI's 12-week web course on finding and creating joy in work and turning staff burnout into engagement)*

LEVEL OF EFFORT

MEDIUM - HIGH

B5: Share baseline data findings with senior leaders and decide on intervention

GOALS

- ✓ Present data findings to inform intervention
- ✓ Decide on intervention to increase staff engagement and retention

COMPLETION TIPS

- ❑ Acquire Inputs: Aggregate baseline data
- ❑ Analyze data and identify key findings and improvement areas
- ❑ Brainstorm and commit to the implementation of one or more staff engagement improvement initiative.
- ❑ Potential staff engagement improvement initiatives can include: development of staff task force to directly address staff concerns (see spotlight report below), Team-building sessions, group workshops, etc.

TOOLS

- ❑ goShadow Resources *(Free survey templates and tools to collect, analyze, and aggregate staff engagement data)*
- ❑ Stoplight Report Template and Intervention Examples List *("Data said this, We did this" – Report used to track and share staff feedback and areas where improvements could/could not be implemented)*
- ❑ TeamSTEPPS Materials *(an evidence-based set of teamwork tools, aimed at optimizing patient outcomes by improving communication and teamwork skills among health care professionals.)*

LEVEL OF EFFORT

MEDIUM

B6: Design PDSA Intervention, Refine Applicable Project Management Documents, and Develop Training Plan

GOALS

- ✓ Create a roadmap for staff WMTY project implementation
- ✓ Plan out the necessary project PDSA cycles needed to fully implement WMTY

COMPLETION TIPS

- ❑ Acquire Inputs: Project Charter, Aggregate Data Findings, Decision on chosen intervention, Communication Plan, Metrics & Data Collection Plan
- ❑ Complete this multi-step process and customize it based on chosen intervention
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Awareness:* This step gives you the opportunity to increase your stakeholders' awareness of the WMTY project. Ensure that they receive the right information about the project and its ongoing activities to increase awareness and engagement.
  - ❑ *Desire:* This step gives you the opportunity to increase your staffs' desire to support and implement this change.
  - ❑ *Knowledge:* In this step, you are teaching your leaders/staff "how" to implement WMTY. This step is about supplying the knowledge, understanding, and the tools necessary for your team to successfully adopt this change and do this work successfully.

Define PDSA Intervention

- ❑ Define how you will execute the chosen intervention/define your PDSA cycles
  - ❑ Plan, Do, Study, Act (PDSA) cycles – This is a 4-step methodology used to adequately plan, implement, evaluate, and improve changes in small, rapid-cycle increments
  - ❑ Ensure the right stakeholders are involved in the planning process to reduce barriers and resistance to PDSA implementation

Refine Project Management Documents

- ❑ Finalize stakeholder list in the project charter
- ❑ Refine Communication Plan and Metrics & Data Collection Plan as needed

Develop Training Plan

- ❑ Create and execute training plan, if applicable
  - ❑ Ensure all stakeholders are trained and/or aware of the WMTY initiative and know how to execute their responsibilities in the project

B6: Design PDSA Intervention, Refine Applicable Project Management Documents, and Develop Training Plan

ADKAR

TOOLS

- ❑ PDSA Implementation Plan Template *(Guides you through each PDSA phase by asking the necessary questions needed to plan, implement, evaluate, and decide on the next steps for each cycle of your WMTY project)*
- ❑ Project Charter Template and Examples *(A central document that defines the fundamental information about a project and is used to authorize it)*
- ❑ Communication Plan Template and Completion Guide *(This is a detailed strategy that outlines an organization's target audiences and the messages they need to receive to drive desired outcomes)*
- ❑ Metrics & Data Collection Plan Template *(This is a well thought out approach to collecting data; it includes where to collect data, how to collect it, when to collect it and who will do the collecting. This plan is prepared for each measure.)*
- ❑ Staff Engagement Training Planning Template *(Includes a standard training curriculum and helps the project team define trainers, trainees, forums, timeframes, etc. for training execution)*
- ❑ Staff Engagement Training Slide Deck – 45 Minutes *(Includes a WMTY overview, a review of the WMTY methodology, and group work)*
- ❑ WMTY Training Handouts *(Includes the WMTY bubble sheet and the WMTY story board template)*

LEVEL OF EFFORT

HIGH

B7: Launch PDSA Intervention

GOALS

✓ Launch WMTY intervention as outlined in the implementation plan

COMPLETION TIPS

- ❑ Acquire Inputs: PDSA Implementation Plan, Metrics & Data Collection Plan, Communication Plan, Training Plan
- ❑ Reinforce project implementation through ongoing support, coaching, and communication
- ❑ Document wins and areas where improvements were tried but could not be implemented – Continuously share how the organization has responded to staff concerns; this fosters an environment of transparency
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ Ability: This gives the project champion and/or trainer(s) the opportunity as a coach to listen to leaders/staff that have practiced asking their staff WMTY, gather their feedback and provide targeted ongoing training and support to provided needed resources, and improve skills, engagement and overall sustainability.

TOOLS

- ❑ PDSA Implementation Plan Template *(Guides you through each PDSA phase by asking the necessary questions needed to plan, implement, evaluate, and decide on the next steps for each cycle of your WMTY project)*
- ❑ Stoplight Report Template and Intervention Examples List *("Data said this, We did this" – Report used to track and share staff feedback and areas where improvements could/could not be implemented)*

LEVEL OF EFFORT

HIGH

B8: Collect Post-Intervention Staff Engagement Data & Complete Data Analysis

GOALS

- ✓ Collect post intervention data
- ✓ Analyze data to understand program impact and gap to goal on defined project measures

COMPLETION TIPS

- ❑ Acquire Inputs: Metrics & Data Collection Plan, Staff Engagement Survey Template, Staff Engagement Pre-Intervention Data Analysis
- ❑ Conduct the post-intervention staff engagement assessment – the assessment should be conducted in the same way and using the same questions as the pre-intervention assessment to allow for a more accurate comparison pre and post intervention
- ❑ Aggregate baseline and post-intervention data
- ❑ Analyze data and identify key findings and improvement areas

TOOLS

- ❑ Staff Engagement Survey Template *(Survey questions to assess staff engagement, burnout, and joy in work)*
- ❑ goShadow Resources *(Free survey templates and tools to collect, analyze, and aggregate staff engagement data)*

LEVEL OF EFFORT

MEDIUM - HIGH

B9: Complete Post Intervention Retrospective

GOALS

- ✓ Review intervention data
- ✓ Collect feedback to define next steps for refinement, adoption, and/or spread

COMPLETION TIPS

- ❑ Acquire Inputs: Patient Experience Data Analysis and stakeholder feedback
- ❑ Ensure a safe space if created for staff to provide open and honest feedback without the risk of retaliation
- ❑ Facilitate a discussion that extracts the PDSA successes and improvement areas
- ❑ Define forum for retrospective information gathering (use existing forums where possible)
- ❑ Document and address key findings - The project sponsor and champion should work to remove barriers and impediments identified in the retrospective sessions
- ❑ Change Management: Included in this step are the following building blocks for successful change:
  - ❑ *Ability:* This gives the project champion and/or trainer(s) the opportunity as a coach to listen to leaders/staff that have practiced asking their staff WMTY, gather their feedback and provide targeted ongoing training and support to provided needed resources, and improve skills, engagement and overall sustainability.

TOOLS

- ❑ Retrospective Questionnaire *(List of questions used to facilitate a post intervention discussion with project stakeholders to identify successes and areas of opportunity)*

LEVEL OF EFFORT

LOW

REINFORCEMENTS

ADKAR

GOALS

- ✓ Provide continuous awareness of initiative and its goals
- ✓ Collect and analyze implementation feedback
- ✓ Diagnose gaps, manage resistance, implement corrective actions
- ✓ Celebrate success to drive continuous improvement

COMPLETION TIPS

- ❑ The final change management principle, *reinforcement,* is an ongoing support process to sustain change through continued awareness, information sharing, coaching and celebration of successes. Below are reinforcement strategies to support ongoing communication and engagement.

COMMUNICATION

- ❑ Monitor continuous execution of communication plan
- ❑ Conduct Team Huddles (Weekly and/or Daily) – Ask what's working well, not working, identify and remove barriers
- ❑ Conduct Executive Huddles – Conduct leadership check-ins & presentation on project efforts and impact to maintain investment at the top level
- ❑ Advertise WMTY across the organization

ENGAGEMENT

- ❑ Document & share wins and areas where improvements were tried but could not be implemented – Share how the organization has responded to staff concerns; this fosters an environment of transparency (i.e. Spotlight Report, Newsletter)
- ❑ Participate in the National WMTY Day on June 9th
- ❑ Provide a forum for staff to share ongoing concerns/requests (survey, suggestion box, etc.)
- ❑ Maintain governance structure (i.e. Meetings, trainings, etc.)
- ❑ Distribute WMTY Swag (I.e. Glasses, Buttons, ID Tags, etc.)

TOOLS

- ❑ WMTY Advertising Materials *(Templates for flyers, graphics, etc.)*
- ❑ Sizzle Reels *(Videos: Short WMTY Case Examples)*
- ❑ Spotlight Report Template *("Data said this, We did this" – Used to track and share staff feedback and areas where improvements could/could not be implemented)*
- ❑ WMTY Day Materials *(Join in on the International WMTY Day, this year it will be on June 9th – Included: Celebration Ideas Webinar: Audio and Slide Deck)*
- ❑ WMTY Swag Ideas *(I.e. Glasses, Buttons, ID Tags, etc.)*

CONCLUSION

Taking Action!

STEP 1: GET READY

- ❑ Implementation Preparation – in which department/unit will WMTY be most successful?
- ❑ Engage Leadership and Staff – identify key stakeholders and ensure support & commitment to begin this project

  Embarking on this project may call for changes in your organizational culture and how staff delivers care to their patients. Change can be challenging, as well as exciting.
- ❑ Create your project team

  Establishing a strong team that includes roles and representation from departments critical to project implementation is the key to success. Recognizing that participating sites have different staffing resources available to them, flexibility in assigning team roles is vital. Consider your current resources and who needs to be at the table to ensure successful implementation of this project.

STEP 2: GET SET

- ❑ Consider which track makes more sense for your organization right now – will it be Patient Experience or Staff Engagement?
- ❑ Review Change Management overview

STEP 3: GO!

- ❑ With your selected track in mind, review the WMTY Implementation Framework within this toolkit
- ❑ Get Started!

Ask What Matters. Listen To What Matters. Do What Matters.

Additional Materials

WMTY Implementation Case Studies

Hospitals

Montefiore Nyack

WMTY was integrated into all hospital inpatient service line workflows to improve patient & staff experience.

Montefiore St. Luke's Cornwall

WMTY was integrated into all hospital services lines and embedded throughout the hospital organizational culture to improve patient and staff experience.

Montefiore Wakefield

WMTY was deployed in the Joint Replacement Center of Excellence. WMTY was integrated across the hospital's care continuum to improve patient experience and improve performance across various HCAHPS domains.

UPMC Magee Women's Hospital

The Bone and Joint Center at UPMC Magee-Women's Hospital engaged pre- and post-operative patients to ask, "What Matters to You?" (WMTY) in their healthcare experience.

Royal Free Hospital

WMTY was integrated in rounding of the oncology and cancer treatment services so that the care team could take action and address what matters most to patients.

Behavioral Health Organizations

Human Development Services of Westchester

Fully embraced, WMTY was not only integrated throughout all HDSW programs and service lines including: The Club House, Care Management Workflows, and Living Room Crisis Respite Program, but embedded throughout the entire organizational culture.

Community Based Organizations

The Harris Project

WMTY was introduced to over 400 high school students across Westchester county at the 2019 CODA Youth Summit, using the "What Important to Me" tool for self advocacy and self-assessment.

Yonkers Public Library

Library collaboration with onsite case management services using WMTY to identify and address patron social determinants of health needs.

Skilled Nursing Facilities

Cabrini Eldercare Skilled Nursing Facility

WMTY was implemented in the short-term rehabilitation unit to improve resident and staff experience.

Sizzle Reels

The series of videos below demonstrate WMTY implementation in a variety of health and care settings:

Implementation Setting	Video Title & Description
Overview of WMTY Movement	Being Patient Centered About Things That Matter w/Q &A: MHVC's Medical Director, Dr. Damara Gutnick's 2017 regional meeting keynote introduced WMTY to a diverse provider network. Stakeholder organizations make commitments to integrate WMTY into a variety of care settings
Overview of WMTY Movement	WMTY St. Luke's-Cornwall Hospital: In this sizzle reel Dr. Gina Del Savio, Chief Medical Officer at St. Lukes Cornwall Hospital speaks about the power of the WMTY movement
Federally Qualified Health Center (FQHC) & Hospital	WMTY Health Care Providers: Sizzle reel highlighting WMTY implementation within an FQHC (Cornerstone Family Health Center) and a Hospital (Montefiore - Wakefield)
Behavioral Health/ Care Management	WMTY Behavioral Health Organizations: Sizzle reel highlighting a behavioral health / care management organization's implementation of WMTY (HDSW) short version
Behavioral Health and FQHC	WMTY Implementation Living Room & Club House Programs, FQHC and Hospital: Sizzle reel highlighting implementation of WMTY in multiple Hudson Valley partner organizations (HDSW, Cornerstone Family Health Center, Wakefield Hospital Nurse) long version (8:45min)
Skilled Nursing Facility	Cabrini Eldercare WMTY: In this video, staff at a skilled nursing facility explain the benefits of WMTY implementation at their organization WMTY Wedding Anniversary: A story of WMTY impact shared by a patient's husband. Staff at Cabrini enabled a wedding anniversary tradition to continue. Honoring a Couples Tradition: Cabrini staff discuss how they accommodated a patient's wedding anniversary. This video features the chef who prepared the feast WMTY Day Celebration with Staff: Cabrini staff share celebrate WMTY Day 2019 and share how WMTY has impacting Joy in Work
Hospital	Lorraine's WMTY Story: A senior executive at Cabrini Eldercare shares a powerful personal story of WMTY impact. She experienced WMTY from the perspective of a family member when her father was hospitalized at White Plains Hospital.
Hospital	Nursing Student Shares a WMTY Story: Nursing student, Cody Hepworth, shares a WMTY story and how what he learned enabled him to make a real difference
Library Case Management Program	More Than Books at the Library: Learn how a unique collaboration between the Yonkers Public library and a housing services agency (CLUSTER) used a WMTY framework to provide case management services and turn issues into answers for library patrons.
Library/ Care Management Agency	CLUSTER Case Manager WMTY: A Community Services Case Manager shares how he uses WMTY as a framework to provide case management at the Library. CLUSTER Patron WMTY: A library patron shares how the Library Case Management program personally impacted what mattered to her.
WMTY adopted to Co-Occurring Disorders Awareness (CODA) Movement	CODA Youth as Voices of Change Summit: Youth at the CODA (Co-Occurring Disorders Awareness) Youth as Voices of Change Summit use a "What's Important to Me" tool based on WMTY to open conversations about what matters most to them. The tools are available as downloads in the WMTY toolkit.
WMTY adopted to evoke what is important to LGBTQ staff members	WMTY LGBTQ Ally Event at Montefiore: This sizzle reel highlights how WMTY was adopted as the theme of Montefiore's LGBTQ ally event. sponsored by Montefiore Learning Network
WMTY Day Celebration Ideas	WMTY Day Webinar 2019: Dr. Damara Gutnick and Joan Chaya share WMTY Day (June 6, 2019) Celebration Ideas with MHVC Partners.

MHVC Posters

- "What Matters to You?" Building Relationships to Improve Patient Experience Metrics and Employee Engagement
- The Evolution of the Montefiore Hudson Valley Collaborative Research Roadmap
- More than Books at the Yonkers Public Library
- Designing Effective Substance Use Referrals: Building the Bridge from Both Sides
- Stopping the Revolving Door: Advancing Community Paramedicine to Engage High Utilizers
- Health Food Distribution at Information Outposts: a Patient Engagement Strategy
- Understanding the Role of Teamwork Across Organizations and Job Roles
- Addressing Social Determinants of Health" Drivers of Burnout, Staff Resiliency and "Joy in Work"

WMTY Training Materials

- Training Planning Template
- Patient Experience Training Slide Deck: 30 Minutes
- Patient Experience Training Slide Deck: 60 Minutes
- Staff Engagement Training Slide Deck: 45 Minutes
- WMTY Training Handouts

WMTY Action Tools

- Patient WMTY Bubble Sheet
- Patient Room WMTY White Board Example
- Patient WMTY Wallet Cards
- WMTY Story Board Template
- WITM Instructions
- WITM Tool

Literature

- WMTY Literature Review: Annotated Supporting Evidence Review
- New England Journal of Medicine: Shared Decision-Making the Pinnacle of Patient Care
- British Columbia: Conversations about What Matters

Podcast Episodes

- What Matters to You? Putting Patients' Goals First

WMTY Partners Around the World

- Montefiore Hudson Valley Collaborative
- Institute for Healthcare Improvement
- British Columbia Patient Safety & Quality Council
- NHS Scotland
- International WMTY Website

Videos

- Dr. DiGioia Shares the Impact of Asking What Matters
- Using "What Matters?" to Motivate and Inspire
- WMTY in Action
- WMTY Stories
- "What Matters to You?" in the Board Room
- Implementing WMTY to Drive Change
- Aligning WMTY with Motivational Interviewing
- Using "What Matters?" to Motivate and Inspire
- End of Life Care and Asking "What Matters to You?"
- How To: Easy Steps to Create a What Matters? Survey

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Thank You For Joining The WMTY Movement!