Capstone Project Playbook

THE VIRGINIA CHC LEADERSHIP INSTITUTE

Leadership Learning Program 2017-18

Capstone Project FAQs

1. What is the Capstone Project?

- An important part of your **CHC Leadership Institute** experience is the opportunity to apply what you have learned in a practical **Capstone Project**.
- Through this experience, you will work together as an inter-professional team to design and implement a practical improvement project for your organization.
- You will also share what you have learned with your peers through a 'teach-back' presentation at the final CHC Leadership Institute session.

2. What Is the Value of the Capstone Project?

- The Capstone Project allows you to strengthen your individual and team skills while solving a practical problem or challenge facing your organization.
- This creates value for you and your organization in return for the investment in the CHC Leadership Institute.

3. What Are the General Steps for the Capstone Project?

- Choose a Topic (October-December)
- Engage the Team (October-December)
- Design the Action Strategy (December/January)
- Test & Refine the Action Strategy (February/March)
- Begin Execution (April/May)
- Share the Learning (Throughout/June Teach-Back).

4. What Are the Time Expectations for the Capstone Project?

- As a guideline, your team members should expect to spend one to two hours per week on their Capstone Project.

5. Do we have to complete our Capstone Project within the CHC Leadership Institute timeframe?

- It is not required to complete your Capstone Project by the final session.
- We do expect each team to be actively progressing, and ready to share a project overview and lessons learned at the final session.

6. What Happens at the Teach-Back Session?

- Each team will present the results of their Capstone Project at the final session in June.
- Your team will have about 20 minutes for the presentation, including time for questions from your peers.

- We will supply a basic template to streamline your presentation planning.
- We also strongly encourage your team to present on your project within your organization.

7. What Are the Topics in the Capstone Project Presentation Template?

- We will ask each team to address the following questions in a concise presentation.

  o What is the general focus of the project?
  o Who are the project team members?
  o What are the specific needs addressed by the project?
  o What are the specific project objectives?
  o What have been the key project assets (people, partners, other resources essential for the project)?
  o What are the key project action strategies?
  o What are the key team development strategies?
  o How did you test and refine your initial approach?
  o What have been the key results to date?
  o What have been the most important lessons learned from the project experience?

8. What Supports Are Available for the Capstone Project?

- In addition to the Learning Sessions and online resources, the Support Team can provide practical coaching and technical assistance as you develop your Capstone Project. We can help your team:

  o Clarify your focus;
  o Define your project aims;
  o Identify best practice strategies;
  o Define key performance indicators;
  o Develop community data if needed;
  o Design project analytics;
  o Think through challenges;
  o Capture lessons learned; and
  o Prepare for the Teach-Back Session.

9. Who Is on the CHC Leadership Institute Support Team?

- The Support Team includes staff from the Association and Community Health Solutions (CHS).
- Click Request Support on the CHC Leadership Institute online platform and you will receive a rapid response from the Support Team.

Team Action Learning

- ☐ Team Action Learning is a powerful strategy for solving challenges and developing talent.
- ☐ Team Action Learning combines focused action with purposeful learning to produce effective solutions and stronger teams.

Team Action Learning Goals

- ☐ Solve a defined challenge through focused action
- ☐ Develop individual and team talent through experiential learning
- ☐ Spread knowledge gained across the organization
- ☐ Develop a culture of rapid learning in response to new challenges and opportunities

Team Action Learning Commitments

- ☐ Commit to action in pursuit of the objective
- ☐ Commit to individual and team learning
- ☐ View self and others as learners and teachers
- ☐ Practice mindful listening
- ☐ Use questions more than directives
- ☐ Welcome questions as opportunities
- ☐ Find the right answers together
- ☐ Let the best ideas win
- ☐ Celebrate the action and the learning

Team Action Learning Steps

- ☐ Choose a focus
- ☐ Engage a team
- ☐ Analyze the situation
- ☐ Design & test solutions
- ☐ Execute for results
- ☐ Share the learning

Team Action Learning Meetings

- ☐ Designate a coach or facilitator
- ☐ Begin and end on time
- ☐ Review the focus and objectives for the meeting
- ☐ Review the Team Action Learning goals and commitments (or have them visible)
- ☐ Invite everyone to participate
- ☐ Use questions to guide the discourse
- ☐ Confirm conclusions and action steps
- ☐ Assign responsibilities and schedule follow-ups

Focusing Questions

- ☐ What is our focus for action?
- ☐ Why is this focus important?
- ☐ Who could be affected?
- ☐ What would we like to accomplish by when?
- ☐ Who do we need as team members, champions, and enablers?

Situation Analysis

- ☐ What do we know about the current situation?
- ☐ What do we need to learn about the current situation?
- ☐ What will happen if we don't address the current situation?
- ☐ How have other people addressed this situation?
- ☐ Who do we need to help address this situation?

SOAR Analysis

- ☐ **Strengths:** What are our assets for this project?
- ☐ **Opportunities:** What are our opportunities for improvement?
- ☐ **Aspirations:** What do we want to accomplish?
- ☐ **Results:** How will we know we have achieved our aims?

Root Cause & Process Analysis

- ☐ The Five Whys
- ☐ Fishbone Diagrams
- ☐ Swim Lane Diagrams

Design Thinking

- ☐ **Empathize:** Who is our user?
- ☐ **Define:** What do our users want and need?
- ☐ **Ideate:** What are some ideas for delivering what our users want and need?
- ☐ **Prototype:** What should our prototype look like?
- ☐ **Test:** What can we learn from our users?

Spreading Innovation

Ask these questions when you are trying to help people adopt a change or innovation.

- ☐ Is the change backed by a credible source or person?
- ☐ Does the change have a clear purpose?
- ☐ Does the change provide a relative advantage?
- ☐ Is the change compatible with local values?
- ☐ Is the change feasible to implement?
- ☐ Can people test and observe the change before adopting?
- ☐ Have we communicated about the change with the right people through the right channels?

Notes:

Focusing Questions	*Use this tool to focus the team on the challenge to be solved.*
1. What is our focus for action?	
2. Why is this focus important?	
3. Who could be affected?	
4. What would we like to accomplish by when?	
5. Who do we need as team members, champions, and enablers?	
Notes:	

Situation Analysis	*Use this tool to define the current situation.*
1. What do we know about the current situation?	
2. What do we need to learn about the current situation?	
3. What will happen if we don't address the current situation?	
4. How have other people addressed this situation?	
5. Who do we need to help address this situation?	

Notes:

| SOAR Analysis	Use this tool to define a shared vision of success.
1. **Strengths:** What are our assets for this project?	
2. **Opportunities:** What are our opportunities for improvement?	
3. **Aspirations:** What do we want to accomplish?	
4. **Results:** How will we know we have achieved our aims?	

Notes:

Root Cause & Process Analysis	Use this tool to identify and solve root causes of process problems.

The Five Whys. If you are working on a process problem, start with a problem statement and ask "why" it is occurring. Make sure that your answer is grounded in fact, then ask "why" again. Continue the process until you reach the root cause of the problem, and you can identify a strategy to prevent or correct the problem. It is rare that this process should require more than five whys.
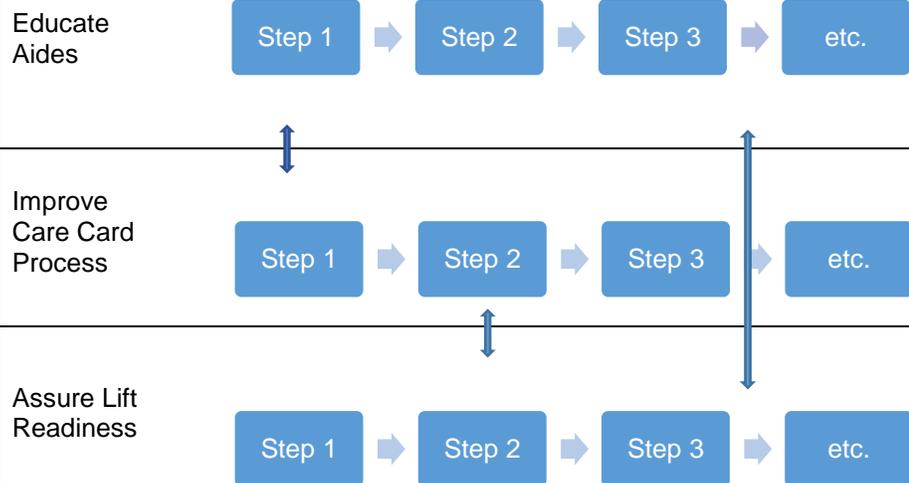
Fishbone Diagram.
Use a fishbone diagram in conjunction with the five whys to document identified causes. This can help everyone on the team understand and contribute to the root cause analysis. (Example diagram is from CMS.)[1]
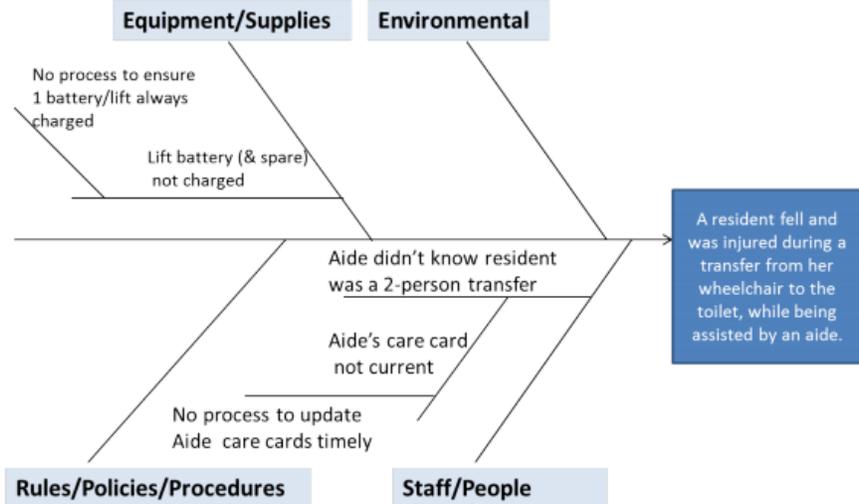
Swim Lane Diagrams.
Use a swim lane diagram to document current processes and create process improvements. The illustration shows three 'swim lanes' for understanding and improving the resident fall problem outlined in the fishbone diagram.

Notes:

[1] https://www.cms.gov/Medicare/Provider-Enrollment-and-Certification/QAPI/downloads/FishboneRevised.pdf

Design Thinking	*Use this tool to design responsive solutions.*
1. **Empathize:** Who is our user?	
2. **Define:** What do our users want and need?	
3. **Ideate:** What are some ideas for delivering what our users want and need?	
4. **Prototype:** What should our prototype look like?	
5. **Test:** What can we learn from our users?	
Notes:	

Spreading Innovation	*Use this tool to optimize design and communication so that key people will adopt your innovation.*

When we ask people to change we are really asking them to innovate. Accordingly, we can learn a lot about designing change from the research on adoption of innovation. For example, we know from research that an innovation is more likely to be spread and adopted if it meets certain needs of the end users. These needs are reflected in the following questions. You can improve your chances of having your ideas and innovations adopted by asking these questions from the perspective of your end users.

1. Is our innovation backed by a credible source or person?	
2. Does our innovation have a clear purpose?	
3. Does our innovation provide a relative advantage?	
4. Is our innovation compatible with local values?	
5. Is our innovation feasible to implement?	
6. Can people test and observe our innovation before adopting it?	
7. Have we communicated about our innovation with the right people through the right channels?	
Notes:	