Module 6:

Prework Phase

Painting by Yasmany Perez Suarez, age 10, from Cuba www.icaf.org

Learning Outcomes for Faculty

The activities in the Prework Phase begin as soon as the acceptance package is sent to participating teams. It is a fast-paced, important phase of the collaborative experience. Faculty focus on the following objectives in this module:

- Coordination of activities to facilitate exposure and knowledge acquisition regarding the intervention for all teams.
- Effective coordination and facilitation of all prework phone conference calls.
- Support and preparation of supervisors for their role in the collaborative experience.

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Learning Outcomes for Participants

Participants will actively be preparing for Learning Session 1 by participating in conference calls, increasing exposure and understanding of the intervention, and meeting with their team to discuss their readiness to adopt the new practice. Participants in the Learning Collaborative will focus on the following objectives during the Prework Phase of the collaborative:

- Identify the primary components of the intervention that will be the focus of the collaborative.
- Complete their organizational readiness assessment and be prepared to discuss the results on the conference call.
- Complete all assignments prior to LS1 outlined in the application packet.

Priority Tasks for Faculty

1. **Promote exposure and knowledge acquisition regarding the intervention through reading, videos, and use of the collaborative Intranet site prior to LS1.** There is never enough time at the Learning Sessions to cover all material relevant to the adoption of the intervention. By using the time strategically during the preparation phase, faculty can accelerate the teaching at Learning Sessions to more skill-focused competencies related to the intervention.

2. **Plan the conference calls that will take place during the Prework Phase.** “Be prepared” is not only the motto for Boy Scouts! Phone conferences can sometimes be an awkward medium for engaging participants in dialogue, so plan the agenda in advance and target desired outcomes for the call. Faculty will need to anticipate how to have participants contribute to the topic or focus of the call.

3. **Support teams in their efforts to assess readiness for introducing a new practice.** Teams will be evaluating their organizational readiness to change their practice and targeting areas that will require improvements, and they will benefit from faculty perspective.

4. **Introduce the metrics that will be part of the collaborative experience.** During one of the calls, take a few minutes to share the measures that will be collected to help track progress of the implementation process.

5. **Use the storyboard to help teams tell the story about their organization and team members.** One method to jumpstart sharing among teams is the use of a storyboard prepared during the Prework Phase and posted at the Learning Session.

6. **Create time for senior leaders to begin discussions regarding their role in the collaborative by arranging at least one call.** As part of the application process, teams committed to engaging senior leaders in the collaborative process. At a minimum, the senior leaders will be part of one call prior to LS1, a “virtual Learning Session,” and periodic calls during Action Periods.

7. **Convene supervisors for a preliminary meeting in person or “virtually” to accelerate exposure to clinical intervention.** Supervisors greatly benefit from an opportunity to begin to develop competencies related to the intervention before their staff.

8. **Consider giving supervisors the opportunity to utilize the intervention prior to LS1.** If supervisors are able to begin utilizing the intervention prior to LS1 (e.g., because they have had previous training in the intervention or participated in a supervisors-only session during the Prework Phase), then faculty will support their implementation with consultation calls and help fast track their leadership within their team.

Learning Outcomes for Supervisors

Supervisors play a key role in the change process, so faculty will engage them early to support their understanding of the intervention and the Learning Collaborative methodology. Supervisors will focus on the following objectives in the Prework Phase:

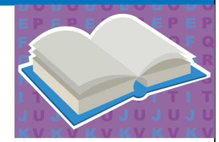
- Identification of key aspects of their role as change agents in supporting the adoption of the new practice.
- Demonstration of the application of the intervention with one case prior to LS1, if possible.
- Creation of a plan to collect data for metrics.

Learning Outcomes for Senior Leaders/ Administrators

During the Prework Phase, senior leaders will have the opportunity to discuss with other leaders their role in supporting the adoption of the new practice. Senior leaders will accomplish the following objectives during the Prework Phase:

- Participate with their team in completing the organizational readiness assessment.
- Discuss and identify key aspects of their role in leading and supporting their staff in adopting the new practice.
- Begin to identify barriers to effective implementation and adoption of the intervention within their organization.

Priority 1:



Promote exposure and knowledge acquisition regarding the intervention through reading, videos, and use of the collaborative Intranet site prior to LS1.

Tips:

- In order to maximize the time during LS1, participants are expected to spend time during the Prework Phase becoming very familiar with the intervention. Clear assignments are helpful so that all participants come prepared for LS1.
- Use the Intranet to share materials. Articles, manuals, and written materials can be easily posted to the Intranet site.
- Audio presentations can be uploaded to the site and made available for participants to listen to prior to LS1. The NCCTS can support faculty in using innovative audio presentations to inspire and support participants in their understanding of the intervention.
- Faculty can post questions, issues, and ideas to the discussion board on the site to begin more informal conversations among the collaborative participants.

Priority 2:

Plan the conference calls that will take place during the Prework Phase.

Tips:

- Typically, there are at least two calls during the Prework phase for all members of the collaborative. In addition, it is beneficial to conduct one call with senior leaders/ administrators after the organizational readiness assessment has been completed and one call with supervisors only.
- The first All Collaborative Call typically includes all members of the collaborative and covers these items:
  - Welcome to all teams
  - Brief introduction of faculty and teams
  - Review of the Prework Phase and assignments
  - Reminder that teams are expected to begin to implement within two-to-four weeks after LS1
  - Brief overview of the collaborative experience
  - Questions

- The second All Collaborative Call focuses primarily on the intervention and can be used to do a brief overview and allow for questions from participants.
- It can be beneficial to encourage participants to post questions or issues on the discussion board of the Intranet site. However, that means faculty has to look at it on a regular basis and respond!
- It is helpful to post supporting materials for calls on the Intranet in advance. Items that can be helpful to post are:
  - Agenda.
  - List of participating teams and members names.
  - Simple guidelines for phone conferences.
  - Post slides from the intervention presentation on the Intranet. Teams can view them as a group from a central computer or, if that technology is not available, with use of an LCD projector.

Priority 3:

Support teams in their efforts to assess readiness for introducing a new practice.

Tips:

- Create a sense of urgency among participants regarding their ability to implement soon after LS1 and help them anticipate what they will need to have in place to make that happen.
- Recommend to each team convening to discuss their readiness to adopt a new practice. Utilizing an organizational readiness assessment, participants can reflect and discuss their strengths and areas that may need improvement.
- Encourage teams to view the process of completing the assessment as multipurpose. This can function as a team-building exercise to help their core team to see the system through its multiple lenses and to focus on this work with a single vision.
  - Construct a shared frame of reference and develop a common language and understanding about the level of functioning of the current system across various components.
  - Help the team identify key successes and challenges and prioritize the key areas the team will focus on for improvement.
  - Prepare participants for the evaluation of the collaborative. Collaborative participants are generally expected to participate in an evaluation of the collaborative experience and its effects (see Module 5). Introducing the evaluation during the Prework Phase is critical.

Priority 4:

Introduce the metrics that will be part of the collaborative experience.

Tips:

- Review briefly the simple and easy metrics that will be used to gather information regarding the implementation of the intervention.
- Remind participants that metrics will be covered more in depth during LS1, so don't spend a lot of time on the call discussing them.

Priority 5:

Use the storyboard to help teams tell the story about their organization and team members.

Tips:

- The use of a storyboard can be a positive, visual contribution to the LS1 experience. Make sure teams don't perceive the storyboards as too time-consuming or burdensome during the Prework Phase.
- Emphasize creativity and fun as two essential elements of the storyboard.
- Create a structure and purpose for the storyboard and communicate that clearly to teams.

Priority 6:

Create time for senior leaders to begin discussions regarding their role in the collaborative.

Tips:

- Create a call for senior leaders to review the outcomes of the organizational-readiness assessment, discuss targeted areas of improvement necessary for implementation, and explore their role in the collaborative process.
- Here are some of the responsibilities of senior leaders/administrators noted in the application that may help in the discussion:
  - Have administrative responsibility within the larger organization (e.g., agency director, management staff) and the influence and authority to make systemic changes and spread these throughout the organization.
  - Provide the team with the resources, including time, materials and equipment, access to local experts, and unequivocal support from agency leadership necessary to implement the changes they choose to test.
  - Attend and participate in at least the Learning Session 2 or a virtual Learning Session for senior leaders.
  - Participate in conference calls on a regular (once every two months) basis.
  - Connect the LC goals to strategic initiatives of the agency.
  - Provide time for the Core Team to attend all three Learning Sessions.
  - Hold team members accountable for initiating, maintaining, and evaluating the implementation of the intervention and the improvements they are testing.
  - Facilitate the implementation of successful changes throughout the agency.
  - Provide continuing opportunities to disseminate what has been learned and to continue change processes within the agency.

Priority 7:

Convene supervisors for a preliminary meeting in person or "virtually" to accelerate exposure to the clinical intervention.

Tips:

- Sometimes supervisors appreciate and benefit from a forum apart from their clinicians to learn the clinical intervention. One adaptation of the LC model includes bringing supervisors together during the Prework Phase for a session prior to LS1 where they learn the intervention. This can be done virtually with video-conferencing or multiple phone conferences for collaboratives with geographically diverse membership.
- Try to create an opportunity for supervisors to focus on their role in the adoption of a new practice. Developing a safe space, separate from their staff, where supervisors can share their concerns about supervising a new practice and the potential resistance to change, can forge the relationships early between supervisors.

Priority 8:

Consider giving supervisors the opportunity to utilize the intervention prior to LS1.

Tips:

- Being able to practice the intervention once before LS1 makes it possible to leverage supervisors as potential leaders in small group work and "champions" of the practice early on in the collaborative process.
- By crafting the role of early adopters for supervisors, it gives them a chance to speak from experience and model for their supervisees the implementation of the intervention.
- Supervisors can be empathetic with their staff in the challenges of learning and implementing a new practice by taking on the challenge themselves.

Frequently Asked Questions

Q: How often should teams be meeting during the Prework Phase (excluding calls)?

A: Teams will meet three times at a minimum to complete the organizational readiness assessment, review the assignments for Prework Phase, and create their storyboard. Some teams opt for some shared learning experiences regarding the intervention and meet more often.

Q: Is it important for team members to be prepared by their leadership before they start to get involved in activities related to Learning Collaborative or should that come from faculty?

A: Senior leaders and supervisors should prepare staff for their participation in Learning Collaborative. It is important that the faculty is not perceived as sole promoters of the intervention. The rationale for the adoption of the intervention needs to come from within the organization. Why are they adopting this particular intervention? How will it help the children or youth being served currently? Is there internal data regarding child outcomes that may be compelling? Is there research data regarding the benefits/outcomes for children that would highlight the use of the intervention?

Q: I am not sure what the storyboard should accomplish?

A: During the Prework Phase, one of the goals is to build a team identify for those who will be attending the Learning Sessions. The storyboard is one way to have each team work together in a fun, creative way to create a team name and motto. Further, they are asked to identify the strengths of their team members and share about the work of their organization. All of these activities help build their team.

Glossary of Terms for Module 6

Champion: An individual in the organization who is committed to adopting the intervention and is willing to make changes/ improvements in order to accomplish it.

Senior Leader: The individual in the organization who supports the team and controls the resources necessary for successful adoption.

"None of us learned to drive by only reading the manual and having a mentor just throw us the keys and say, "Good luck," at least not if it was their car and they were paying the insurance! The BSC/Learning Collaborative Process provided "time behind the wheel" to get the feel of the process of implementation, provided consultation and a proven structure for change implementation—which we will try to continue to use—and lent needed validation to the realization that while the concepts aren't hard, the reality is that implementing to the level of "Full Operation" in any setting is not easy and takes effort and commitment that will pay off if you stick to it."

Roy Van Tassell

Family and Children's Services/Oklahoma Child Traumatic Stress Treatment Collaborative

Participant, Breakthrough Series
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Support Materials Module 6

List of Support Materials

- Faculty Checklist

Faculty Checklist

Prework Phase

- ❑ Communicate consistently through the Prework Phase the importance of preparation by exposing themselves to the intervention and participating in all activities.
- ❑ Consider applying for CEU credits for participants.
- ❑ Post assignments, materials and announcements related to Prework Phase on the intranet.
- ❑ If you are requiring viewing of videos/ DVDs, make resources available with sufficient time for viewing by all participants.
- ❑ Plan and conduct first prework call.

  Agenda will include:

  - ✓ Welcome to all teams
  - ✓ Introduction of teams and faculty in the LC
  - ✓ Review of the Prework Phase and assignments
  - ✓ Brief overview of the LC (what to expect)
  - ✓ Key clinical competencies that will be covered during LS1and relevance of Prework preparation to activities at LS1
  - ✓ Questions
- ❑ Plan and conduct second call focused on organizational readiness for senior leaders and supervisors. Ask teams to complete and submit the organizational readiness assessment to the faculty prior to this call.

  Agenda will include:

  - ✓ Welcome/roll call
  - ✓ Brief description of the role of the senior leader in the collaborative experience
  - ✓ Discussion regarding the organizational readiness assessments. What was revealed through this process? Any areas of concern? Areas that need improvement?
  - ✓ Other relevant topics: Timeline for implementation of the intervention? How will they integrate this new practice into supervision? Is funding/ billing a issue?
- ❑ Initiate a discussion on the intranet to begin a dialogue among participants.
- ❑ Begin preparations for LS1.