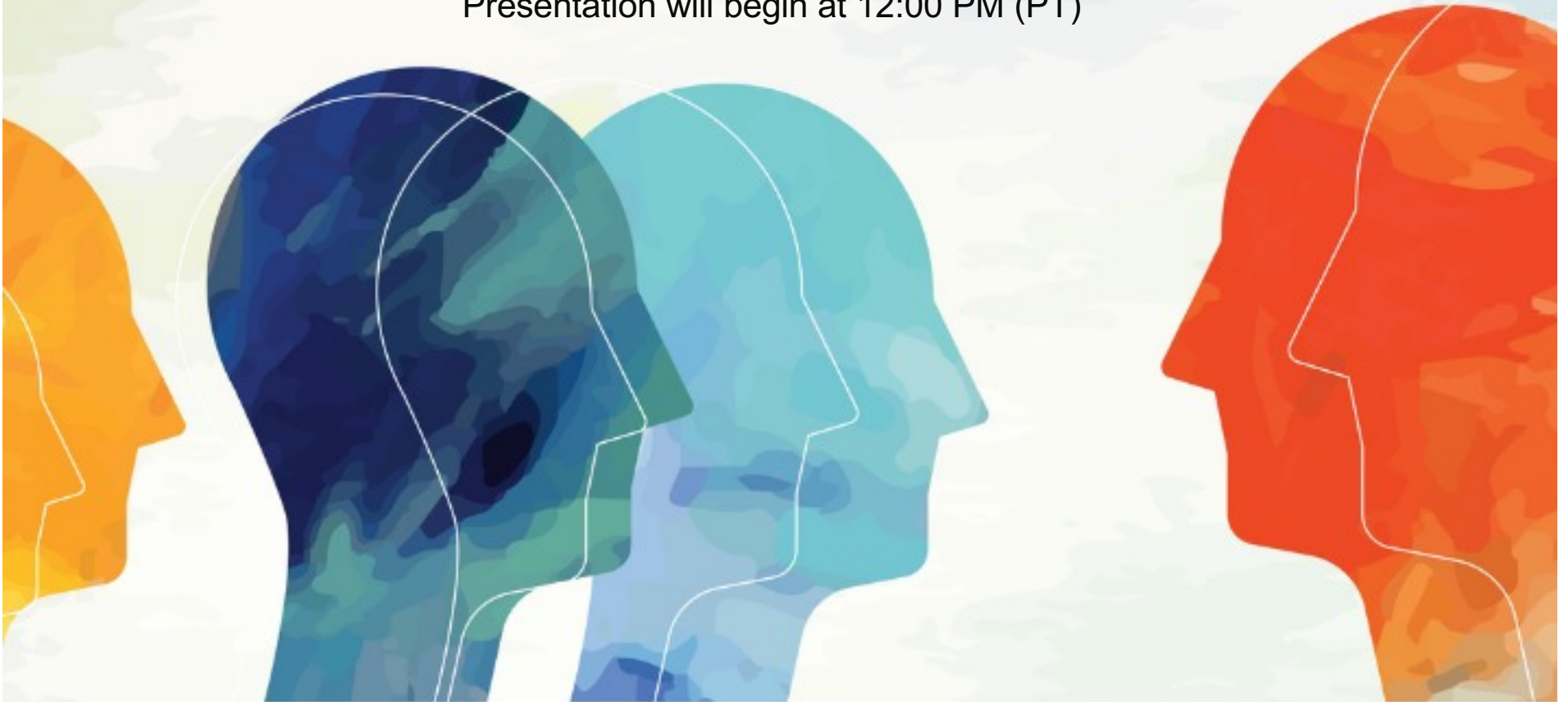


Career Development Series 2020

Study Planning for High Success and Low Stress

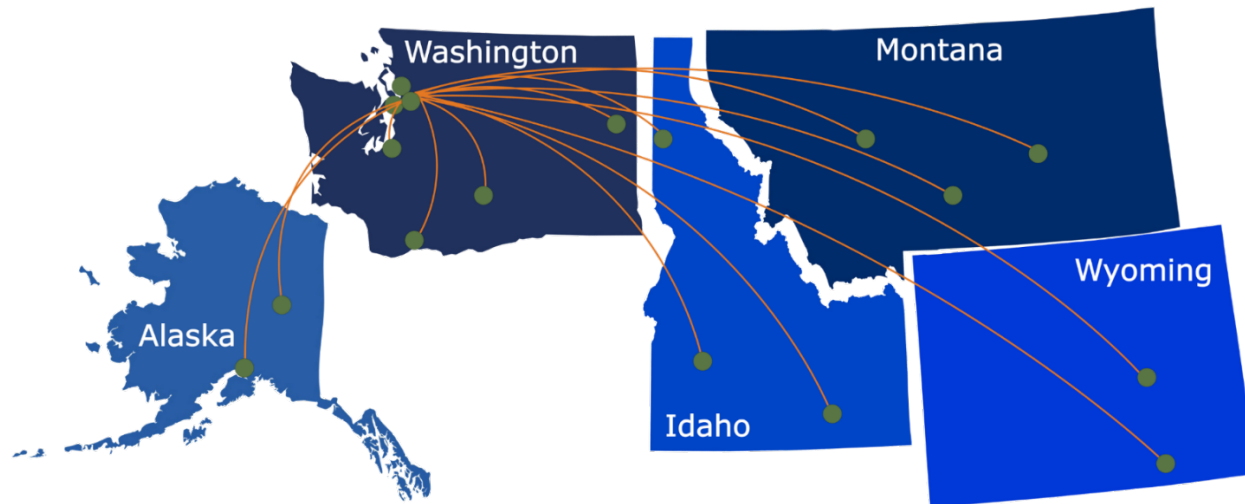
Presentation will begin at 12:00 PM (PT)



ITHS

Institute of **Translational** Health Sciences

ACCELERATING RESEARCH. IMPROVING HEALTH.



What We Offer:

- 1 Research Support Services:** Members gain access the different research services, resources, and tools offered by ITHS, including the ITHS Research Navigator.
- 2 Community Engagement:** Members can connect with regional and community based practice networks
- 3 Education & Training:** Members can access a variety of workforce development and mentoring programs and apply for formal training programs.
- 4 Funding:** Members can apply for local and national pilot grants and other funding opportunities. ITHS also offers letters of support for grant submissions.

Contact our **Director of Research Development**



- **Project Consultation**
- **Strategic Direction**
- **Resources and Networking**

Melissa D. Vaught, Ph.D.
ithsnav@uw.edu
206.616.3875

Upcoming Career Development Series 2020

March 26 – Developing Diagnostic Tests

April TBD – Single IRB

April 14 – The Ins and Outs of Collaboration

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Feedback

At the end of the seminar, a link to the feedback survey will be sent to the email address you used to register.



Study Planning for High Success and Low Stress

Jennifer Sprecher

Learning Objectives

- 1 Create alignment around the study objective
- 2 Role clarity among the team
- 3 Milestone planning
- 4 Communication planning

Study Planning for High Success Low Stress

Agenda

- Problem Statement & Objective
- Team Roles /Responsibilities document
- Milestone Planning
- Communication Plan

Lean Project Charters

Based on concepts of:

- ▶ Project management Institute
- ▶ Agile
- ▶ Lean
- ▶ Continuous Improvement (PDSA)
- ▶ Theories of Change Management

Page 1 Study Name: _____ Revision Date: _____ Date Started: _____ PI: _____		ITHS Institute of Translational Health Sciences
<p>A. Problem Statement / Need to be met by this study What is the problem being experienced? What need is this study addressing? Be specific in identifying the "pain point" to provide a basis for doing this study. Talk about problem statement – why is that important? I.e., if it takes too long, "how long"? If there is an unknown, how does that unknown affect progress towards patient care?</p> <p>Discussion Questions for Problem Statement/ Potential Benefits</p> <ul style="list-style-type: none"> • Does the statement give a good description of what the project is addressing? • Is the issue or theme stated as it relates to the customer/stakeholder? • Include quantitative data where available – something that will quantify why this is a problem – not just a one-time occurrence. <p>Questions to be answered: Brief Introduction to project: Benefits that will be realized from project:</p>		<p>B. Customers/End Users (I.e. patients, students, researchers, community members, special populations...)</p> <p>What is their role in the study? Will they be engaged throughout; are their milestones where they will be engaged? What is the method of communication? Meetings/frequency, Emails/updates, etc.</p>
<p>C. Funding Organization Objectives Supported by this Study</p>		<p>D. Team Participants/ Selection/ Roles</p> <ul style="list-style-type: none"> • Is team member selection realistic and will members be able to contribute accordingly? • Are key stakeholders and pertinent partners represented? • Who is not at the table <p>Who Knows? Who Cares? Who Can Act?</p> <ul style="list-style-type: none"> • Are the necessary subject matter experts included (statistical plan and support, cohort identification, study support)? • What are the roles of the team members? Are all members involved to the same degree or will some be engaged at different points of the study? • How will communication with the team occur? Meetings, minutes, shared drives, news bulletins.. • How will decisions be made and conflict be addressed?
<p>E. Current State Definition Description of the current process or state of knowledge-. Include information and data to show why it is a problem or what knowledge is lacking to help support your problem statement.</p>		
<p>F. Included in Scope</p> <ul style="list-style-type: none"> • Where the process starts and where does it end (bookends)? • Does the scope clearly define what is included in the study? 	<p>F. Excluded from Scope</p> <ul style="list-style-type: none"> • What is specifically not in scope (off the table)? • Are the items and/or areas out of scope clearly spelled out? 	
<p>G. Objectives/Outputs /Deliverables/</p> <ul style="list-style-type: none"> • Aims • Sub Aims • Outputs for each aim • Outcomes for the study • Is a publication one output for this study? If so, what are the topics of the publication (s) and plan for what will be needed to publish? • How will your team address primary and secondary authorship? 	<p>H. Evaluation</p> <ul style="list-style-type: none"> • Are the metrics measurable, meaningful scorecard metrics that would support more focus and attention on attaining this goal? • Do the metrics align with objectives? • Are the metrics within the scope of this study? • Are there appropriate qualitative data that should be collected? • What outcomes are you seeking and how will you know those outcomes were achieved? • If outcomes have a long lead-time in showing achievement are there leading indicators? 	
<p>I. Approach & Critical Path Milestones & Time Frames</p> <ul style="list-style-type: none"> • What is the approach? • Do the milestones and timelines define what needs to happen to move us to the end of the study (are all deliverables contained in the milestones)? • Has each activity in the plan been specified as to when and outcome? • Is the plan realistic and achievable? • Is the scope of proposed work realistic for the time assigned? 		<p>J. Risks</p> <ul style="list-style-type: none"> • Are risks clearly outlined and identify what needs to be addressed for study completion and success? <p>Dependencies</p> <ul style="list-style-type: none"> • Are dependencies well defined within/across area of the study, I.e. all ITHS and institutions?
<p>K. Resources</p> <ul style="list-style-type: none"> • What are the anticipated resources to design/ implement the study? (estimated FTE, costs, equipment, etc) • What is needed to sustain the effort once implemented? (How will the effort be sustained?) (if applicable) 		

Alignment



Complete Charter Section A & G

- ▶ What problem or issue is your project addressing?
- ▶ What are the benefits of addressing this issue?
- ▶ What are the objectives of your project?
- ▶ What are the deliverables of your project?

Alignment

Breakout Discussion

1. What were some of the challenges in responding to these questions?
2. What are the benefits of having ready responses to :
 - A. Problem
 - B. Benefits
 - C. Objective
 - D. Deliverables

Complete Charter Section A & G

- ▶ What problem or issue is your project addressing?
- ▶ What are the benefits of addressing this issue?
- ▶ What are the objectives of your project?
- ▶ What are the deliverables of your project

The Team

Project Charter Section D

- ▶ Roles
- ▶ Sponsor
- ▶ Team Lead
- ▶ Facilitator
- ▶ Member

Members

Who Knows?

Who Cares?

Who can Act?

Purpose

Represent Researchers?

Community Representatives?

Underserved Populations?

Represent disciplines or departments?

Subject Matter Experts (SME)

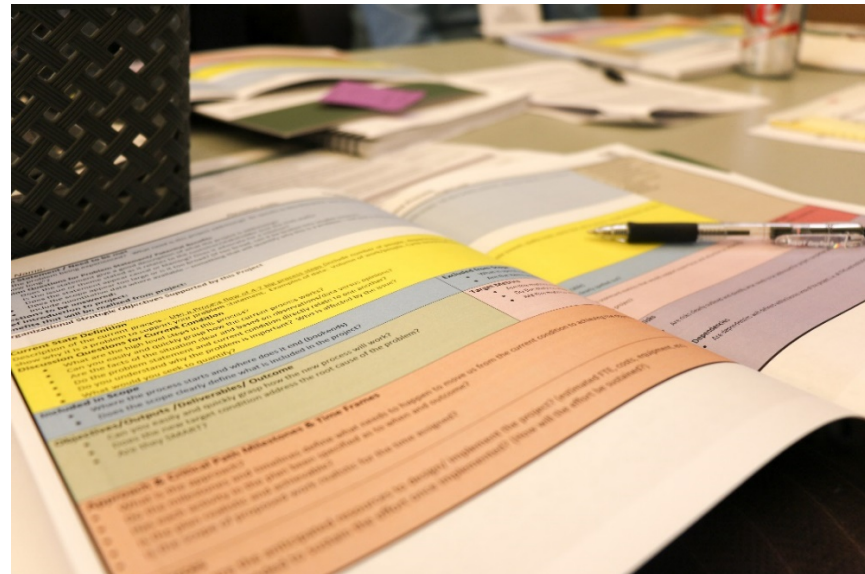
Involvement

All meetings

As requested

Action items

Communication



Roles and Responsibilities

Breakout Discussion:

What are some of the roles on your team?

How will your team share support roles?

Sub Group	Person, Contact	Role	Meetings Attending	FTE
Overall		PI -Article possibilities and authorship -Budget	Bi-weekly all team Group 1 Group 2	.9
Overall		Project mgmt. -project plan -facilitate all-team -role clarity -APR		.5

What is the Process to Reach your Objective?

CONSIDERATIONS:

- ▶ Data collection
 - ▶ Identification of problems, root causes
 - ▶ Development of solutions, materials
 - ▶ Piloting
 - ▶ Establishing a consistent ongoing process
-
- Process Flow Charting

Tools

BRAINSTORMING

- ▶ Contribute
 - ▶ Clarify
 - ▶ Evaluate
-
- Flowcharting



Table Exercise – Flow Project Steps



Project Charter Section H

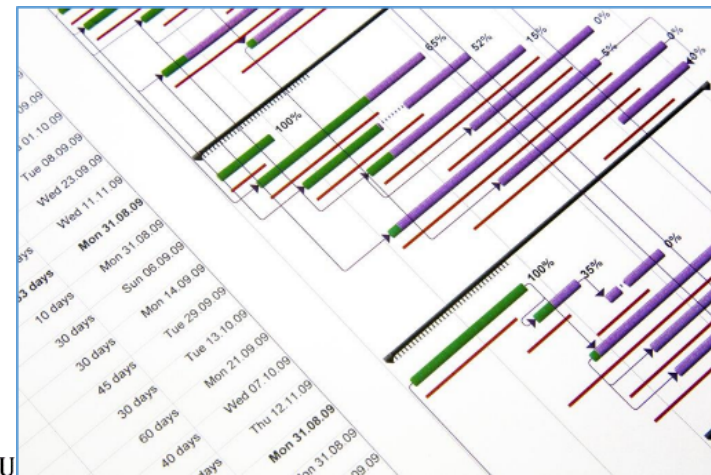
Create flow chart for your project

Work Plan

PROJECT CHARTER SECTION H

Project Duration:

- ▶ Phased to 3 months
- ▶ Milestones by month to 3 month
- ▶ Phases (if not milestones) should provide indication of success



Communication Plan

- Aim
- Approach
- Appoint



Communication Plan

AIM

- Share, gathering
- Objective
- Desired result
- Audience- Dictates depth, language, length
- Message- Primary points or questions



CHAT:

What are some of the listening points in your project?

What are the key communication points?



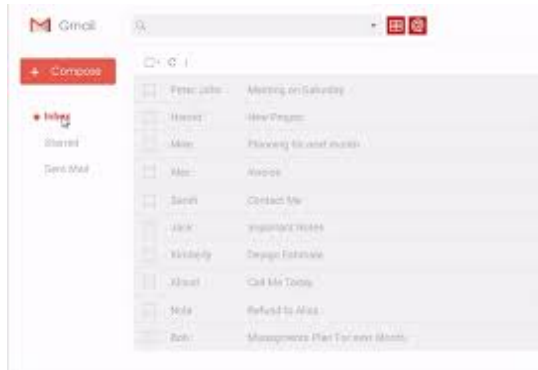
Communication Plan

APPROACH

- Modality
- Frequency

CHAT:

What are some methods of listening?



Communication Plan

APPOINT

- Creator
- Logistics
- Distributor

Create Your Communication Plan

HANDOUTS

Example Communication Plan

Communication Form

Project Title:
Project Leader:

Communication Purpose	Primary Message (bullet)	Audience/Motivation	Frequency	Vehicle	Who Develops	Who Delivers
What is the purpose of this communication (e.g., status report, monthly update)?	What is the content of this communication (e.g., summary of project status, update on project deliverables)?	Who needs to be informed (e.g., ITHS Staff, WWAMI region investigators, etc.)? Why should they care?	How often will this type of communication occur?	What is the format (e.g., email, meeting, SharePoint, etc.)?	What do you want to get out of it (i.e., the goal)?	Who is delivering the communication?

Summary

CONCEPTS

- Alignment
 - Why- problem statement
 - Objective
- Team Roles
- Planning and Milestones
- Multi-directional Communication
 - Aim
 - Approach
 - Appoint

TOOLS

- Charter
- Role Document
- Brainstorming
- Flow Charting
- Communication Plan

Questions?

Feedback Survey

A link to the feedback survey has been sent to the email address you used to register.

Please get out your device, find that email, and spend a few moments completing that survey before you leave today.

Tip: If on a mobile device, shift view to landscape view (sideways) for better user experience.