

IPC / IPE Project Planning:

Questions to Consider

A knowledge sharing product
from the

Partnered Learning Project

January 2008 – June 2009

Funded by **HealthForceOntario**

Project Partners

The Hospital for Sick Children (SickKids), Toronto

Toronto Rehabilitation Institute (Toronto Rehab), Toronto

Children's Hospital of Eastern Ontario (CHEO), Ottawa

This *Questions to Consider* document is an excerpt from:

Project Handbook: A Guide to Early Planning for the Development of an Interprofessional Collaboration and Education Program in a Healthcare Setting

Terminology

For the purposes of the Partnered Learning Project (PLP) study it was important to distinguish between interprofessional collaboration as practiced by professionals working in clinical teams and the building of interprofessional collaboration knowledge, skills, and attitudes by pre-licensure, healthcare students. To maintain consistency and clarity throughout the project implementation and materials, the PLP Project has used IPC to refer to the interprofessional collaboration of practicing professionals and IPE to refer to the curriculum and learning associated with healthcare students at the pre-licensure stage.

IPC or Interprofessional collaboration = the collaboration of healthcare professionals working together in a clinical team comprised of three or more professions.

IPE or Interprofessional education = process of learning how members of different healthcare professions work collaboratively and the curriculum related to that learning, for pre-licensure healthcare students.

Assessing the institutional culture and readiness

Questions to Consider

1. **Understanding the current learning culture:** Can you include on the project development team a staff representative knowledgeable about the customary learning approaches used in units or organizations where the program will be implemented.Have staff had previous exposure to IPC/IPE concepts and language? Are there information sources you can tap into to learn about the levels of exposure staff have had to the subject?
2. **Senior Management Support:** What is the level of commitment shown by the senior management towards enhancing organizational support for interprofessional collaboration? ...Are there inconsistencies in this support or its visibility in different sections of the organization?
3. **Understanding the Program Mandate:** Are the learning objectives clearly connected to established organizational priorities? Are these organizational priorities understood and shared by the intended participants? Is there clarity between the program planners and those providing the funding for the program concerning the intended scope and future of the proposed program? For example, if there has only been funding approved for one year of the proposed training program, have you had a discussion about sustainability?
4. **Acceptance of Learning Methodology:** Are staff accustomed to participating in the type of professional development activities that are being contemplated (i.e. role playing)? Will the proposed learning activities be regarded as relevant learning opportunities by the targeted participants? Will the learning time qualify for professional development time credits? Are there other ways to acknowledge the participant's learning which are considered relevant by your target audience?
5. **Realistic:** Are the proposed logistical plans realistic?Can staff take the required time away from their daily practice to participate in education sessions? ...What supports can be put in place to ensure participation and engagement? Can the physical requirement of implementing the training program be satisfied? For example -- is meeting space generally available? Is there someone to manage the organizing details? Are there acceptable ways of recruiting and communicating with prospective participants?
6. **Congruency:** Are there environmental or cultural characteristics of the organization that are inconsistent or even in conflict with the key elements of the proposed content or program design? ... Will there be options for follow-up or additional support available to participants for transferring the learning into practice after the event?
7. **Foundational values:** Is there a pre-existing culture of collaboration between departments or organizations who will be jointly involved in the program? ...If there is not a pre-existing culture of collaboration and partnering demonstrated through operational practices, will time be dedicated to identifying the values and capacity of each participating department, unit or organization so that the needs and expectations of each partner group are understood from the outset?

Project Administration

Questions to Consider

1. **Program Oversight and Direction setting:** Will you establish a Steering Committee that includes representation from the various organizational units to be directly served and broad representation of professional stakeholder groups? ...Will the Steering Committee have specific roles and responsibilities for the Committee as a whole and for individual members? Is it desirable to arrange for Committee member alternates to ensure full representational input at each meeting?
2. **Administrative co-ordination:** Is the role of administrative co-ordination assigned to someone who has both the skills and the willingness to fill this function? Should the administrative co-ordination required for the project be a dedicated position rather than be incorporated into someone's existing workload? Is this a function that it would be more efficient or appropriate to purchase? How complex is the project? Does the complexity level suggest that project management skills may be required to keep things co-ordinated, on time, and on budget?
3. **Organizing and Scheduling:** How will the work of the Steering Committee be recorded and communicated? ...Who needs to have access to project development and implementation records and for what purpose? Can these records be designed to satisfy, in whole or in part, accountability reporting requirements, which the project may be subject to? Does the format make it easy to identify Committee decisions, task assignments to members, bring forward items and their respective due dates? Have strategies and timetables been established to ensure Committee direction and decisions are made in a timely way throughout the life of the project?
4. **Monitoring, Reporting and Evaluating:** Has the required information been identified and is it being gathered in such a way that it supports responsible monitoring, reporting, and evaluation of the project design and implementation work? Have clear processes and responsibilities been identified from the outset to ensure valuable information is not lost and the accountability requirements for the project can be fully met? Is there a means of gathering and receiving unanticipated issues and feedback from stakeholders?

Project Implementation

Questions to Consider

1. **Creating Awareness:** Do you have or are you able to secure visible support for the project from senior management? ...Do you have a communications strategy to get initial word out about your project? Have you developed a standard set of communication aids that can be adapted quickly to various situations but still ensure the message is complete and accurate? Have you field tested your documents to ensure your communication is understandable?
2. **Timeliness:** Will the project leaders/decision-makers meet frequently enough and with adequate time to make the needed implementation decisions in a timely manner? ... Is the project implementation timeline realistic and respectful not only of the schedules of the Committee members but also of other participants / learners whose engagement is being solicited in the project development and implementation work?
3. **Roles & Responsibilities:** Have implementation leadership and co-ordination roles been specifically assigned and do the designated individuals have the confidence of the group? ...Has it been decided by whom, how, and when the actual work of implementation will get done? Are these roles understood and accepted by everyone involved? Have the linkages and communications between everyone involved in the implementation been clarified?
4. **Implementation Work:** What role will the oversight body members have in the actual implementation? ... How will those responsible for the implementation work communication with the Steering Committee if different players are involved? If the Steering Committee is involved in / responsible for the implementation, will the Committee members do their implementation work during the committee meetings or will this be done via separate working groups? Are planned working groups of appropriate size to facilitate scheduling, realistic workload sharing, and input from subject matter experts? How will appropriate expertise be brought into the planning and development work if this expertise is not fully covered through the Steering Committee membership?
5. **Resources:** How much flexibility is in the project budget to pay for services and resources along the way? ...Are there established procedures for accessing funds in a timely way, when needed? Have you identified all other resources that will be required to complete the project? (E.g. meeting rooms, projectors, catering etc.) Has an assessment been done to determine the availability of these resources, the time and process involved in securing these resources? Will their availability impact the delivery schedule or arrangements?
6. **Recruitment:** Are there recruitment or eligibility criteria for participants to ensure an appropriate match between learner needs and the program? ...Are these criteria used and presented in a positive manner when recruiting participants? Is there sufficient numbers of eligible participants to sustain the program as planned? Is there an effective way of registering participants? Has a threshold attendance number been established to make the activities viable?
7. **Relevant and Reliable:** Was a needs assessment completed prior to the project? ...Has the project established meaningful learning objectives for participants? Was the curriculum / material pilot tested? Is there a documented curriculum and process for delivering events? Is there a means of carrying on if a key presenter or facilitator becomes unavailable on short notice? Are there plans for providing the participants with feedback?
8. **Evaluation:** Is there an appropriate evaluation process in place to determine the success in meeting these objectives? ...Has the project established a broader set of success criteria for the design and delivery of the program? Is there an appropriate assessment process in place to monitor progress against these criteria? Has it been determined what type and level of issues should be brought back to the project team for review? Is the program open to changes along the way, based upon feedback and monitoring? If the program may be changed, under what circumstances would this be contemplated?

Tips on Selecting Teams

Questions to Consider

1. **Identifying your Participants:** Is participation intended to be voluntary? ...What is the level of participant knowledge, skills and team function that your proposed program is most suited to? Are there meaningful incentives for participation? Are prospective participants aware of the incentives?
2. **Establishing Eligibility:** Are there established eligibility criteria for participation? ... By whom and by what means are prospective participants assessed against the criteria?
3. **Co-ordinated planning with Participant Teams:** Will someone on the clinical team facilitate access and/or assist with communications & co-ordination of implementation tasks? Is there a time when the team is regularly scheduled to gather that you can co-ordinate your schedule to? Is space a problem and will you need to take this into account when you propose times and places to meet with the team? Are there key individuals whose presence will significantly impact the learning experience and do you know when any such individuals are available?
4. **Readiness to Learn:** Have participants had prior exposure to the subject matter? ...Do the participants have competing commitments that may impact their experience or engagement? Are there special learning needs among the team members that should be taken into account?

Student Placement Scheduling

Questions to Consider

1. **Interprofessional Opportunities:** Are students from different professions placed in a common area / unit? ...Are there units in the organization who typically host students from various professions?
2. **Time for learning and reflection:** Will the schedules of the students completing clinical placements in a common area overlap? ...Is there overlap by at least 3 weeks in the student clinical placement schedule? If less than a 3 week overlap exists, can contact (teleconferencing, videoconferencing) be arranged? At the time of the IPE placement will the students have started their clinical placements?
3. **Shared subject matter:** Will students be involved in the care of the same patients while in the clinical area/unit? What patients will the students be learning about? ...Will students have the opportunity to learn with, from an about each other, and collaborate with each other during all phases of their profession-specific placements?

Facilitation and Faculty Development

Questions to Consider

1. **IPC Workshop Facilitation:** Does the facilitator(s) have a clear sense of the purpose of the exercise and the necessary skills to facilitate the process? Has forethought been given to the approach so as to avoid causing unintended strain or expectations within the participating team? Will the chosen facilitators be credible to the participants? Are the facilitators sensitive to the cultural context of the team and its work environment?
2. **Process Integrity:** Were the facilitators involved in or consulted during the curriculum planning to ensure sufficient attention has been paid to process as well as content? ... Has the facilitator been given clear information about the project parameters or boundaries that should be respected? Will feedback and /or a debrief session with the facilitator be a part of the process to ensure this particular perspective is reflected in the monitoring / evaluation data?
3. **Identifying Facilitators for IPE Activities:** Are there individuals interested in interprofessional education in the organization?Is there a network of interprofessional educators? Are there individuals mandated to provide hospital-wide educational activities and events? Is there an IPE lead in the organization?

4. **IPE Faculty Development:** Are there existing faculty development programs/strategies available in the community (e.g. other organizations, academic institutions)? ...Is there a relationship between organizations for networking and faculty development? Will faculty who will be working together have appropriate opportunities to get to know each other before they begin working together?

Monitoring

Questions to Consider

1. **Guiding Workplan:** Do you have an implementation workplan against which you can monitor progress? ... Is there an established schedule and process for status reporting and measuring achievements against expectations? Is there a well-thought out format for status reporting so important events or trends are not overlooked? Does the monitoring information of various project components come together to create the full picture at regular intervals? Have realistic times been planned for each step to be completed, with reasonable allowance in the overall schedule for delays and other unexpected events?
2. **Roles & Responsibilities:** Is it clear to the full implementation team where decision-making authority lies for different types of decisions? Is there a designated project contact person who is available to respond to or redirect queries about the project? In particular, will this person actively follow-up on key steps such as Business Case or Research Ethics submissions that are critical to the project implementation?
3. **Resources:** Have the project resources been budgeted realistically? (At a minimum this would include human and financial resources.) ...Are there and appropriate processes in place, (record keeping, *and* analysis) to provide an accurate and complete picture of both the receipt and utilization of all project resources?
4. **Student Placements:** What strategies exist to monitor the progress and actual placement? ...What support mechanisms are useful for the IPE facilitators? Are monitoring strategies formal or informal? Are there different monitoring strategies for students than facilitators? What support mechanisms are useful for the IPE facilitators?

Evaluation

Questions to Consider

1. **Evaluating the Process:** Have S.M.A.R.T. goals for the project itself been established so that the process of design and implementation can be evaluated? Will the evaluation capture the perspectives of both insiders and external observers? Will there be a meaningful connection between monitoring of the process along the way and the final evaluation data? Will evaluations be administered to those who may exit the project before it is formally concluded?
2. **Learning Objectives:** Have learning objectives been established for the educational activities to support evaluation?Do proposed evaluation instruments address the learning objectives? Are levels of learning being considered when setting the learning objectives and designing the evaluation?
3. **Evaluation Data Analysis:** Have the various audiences who may benefit from the evaluation results been considered at the evaluation planning stage? ...Does the design of the evaluation gathering process and tools support meaningful data roll-up, synthesis, and analysis once the evaluation data has been gathered? Will the evaluation be carried out in a consistent manner throughout the project?
4. **Evaluation of IPE:** Are there evaluations for all stakeholders (i.e. for students, for preceptors and for clinical teams)? ...Are quantitative and qualitative evaluations used to good effect?

Reporting & Feedback

Questions to Consider

1. **Reporting:** Has responsibility been assigned to someone to ensure the co-ordination of data and completion of any reports that might be required on an ongoing basis? ... Does the process include review and sign-off by those with responsibility / authority for the project? Have processes been put in place to ensure timely submission of all information to the reporting co-ordinator? Have information needs of

audiences internal and external to the project been considered when planning the reporting activities and formats?

2. **Data Storage and Version Tracking:** Has consideration been given to centralizing data storage to avoid unnecessary duplication or omission of data, or the administrative overhead of transmitting data back and forth? ...Are all reports clearly labeled with key tracking information on the face page, including date that information is current to, who completed the report, the purpose or recipient(s) of the report and date it is submitted? Do all reports in a series (e.g. quarterly reports through the life of a project) maintain a common look and sequence coding for ease of recognition and ordering? Where appropriate, have version numbers or *Draft* labels been used to avoid confusion through the drafting stage?
3. **Feedback:** Has the need for feedback by participants (or others such as organizational champions) been considered? ...What is the best format for providing feedback? Has thought been given to a means of ensuring all informal feedback / reporting is consistent with formal and documented reporting? Should there be some documentation of the informal feedback/reporting such as timing, content, presenter/speaker, purpose etc.? Were feedback commitments communicated clearly from the outset as to what would and would not be included in the feedback?

Research

Questions to Consider

1. **Research Questions:** Are your research questions documented in clearly written language? ...Is the scope of the research questions appropriately matched to the aims and resources of your initiative?
2. **Ethics Approvals:** What, if any, ethical approvals will be required? ...Will more than one research ethics approval be required to fully implement the project? If so, can a portion of the material be written in a manner that will serve multiple applications? What are the terms for expedited review and does this project satisfy the criteria? Is there someone familiar with the application process who will offer advice on the preparation of the application? Can the Research Ethics application be written broadly enough to allow for possible adaptations to the implementation strategy as experience builds, without having to return for further approval? Have you built into your timeline the necessary months to achieve this approval at all sites?
3. **Data Collection:** What type of data will you collect to answer the research questions? Will you collect qualitative data, quantitative data, or both? ...Do you have the required expertise on your team to oversee the proposed data collection and analysis? Can you access data that already exists, such as institutional surveys? What primary data will you need to collect and what resources will be required? Who will oversee the individuals charged with collecting and managing these data to ensure consistency and confidentiality?
4. **Data Recording:** Do you have or can you develop an appropriate database to store and organize the data you collect? ...Where will this database be housed? Will the database need to exist beyond the study timeline, to satisfy ethical requirements for retaining study data?
5. **Data Analysis:** How will the research analysis unfold, particularly as it may extend beyond the timeframe of the training and placement implementation? ...What structures and strategies will need to be in place to support this ongoing work of the research team? Have questions of authorship and intellectual property been addressed?
6. **Dissemination of Results:** How will you disseminate the results of your research activities? ...Who are your audiences? Are your proposed dissemination methods sufficient and appropriate to reach your intended audiences? Have you investigated possible limitations or restrictions, particularly with regard to publishing, which might influence your dissemination choices or timetable?