

The Clinical Scene Investigator (CSI) Academy Process Toolkit



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For more information, please contact:

Susan Lacey, Director
Adrienne Olney, Center Staff
816-701-5270
aolney@cmh.edu

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To create a Clinical Scene Investigator (CSI) Academy to teach staff nurses skills to create a change project and improve patient outcomes

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The Issue

Nurses have the ability to create significant improvement in patient outcomes. However, many newly licensed nurses, as well as seasoned nurses, lack the knowledge, skill sets and attitudes necessary to accomplish this goal. Clinical staff nurses often struggle to be included in quality and safety discussions because they have deficits in quality improvement methodologies and the language of process improvement. This is especially true when they interact with physicians and others who hold formal positions in quality and safety.

While it is vital to teach these skills to clinical nurses, it is not enough to simply know this language. There are additional skills needed to affect and lead change .These include: team building, advanced leadership, social entrepreneurship, general messaging, and staying on message.

Staff nurses on the front lines have a first-hand view of problems and processes that need to be addressed. Further, these same nurses know how these problems and processes can be solved and improved. Unfortunately, in many cases due to the culture of their institution, they may never be asked for input. Top-down decisions and strategies continue to be the predominant model of improvement for most healthcare organizations.

The CSI Academy

There are three overall goals of the Clinical Scene Investigator (CSI) Academy:

- To create meaningful and lasting change at the bedside
- To sustain these improvements over time
- To spread the change process to other units throughout the organization and other hospitals.

CSI Teams

To begin the CSI Academy, the Chief Nursing Officer (CNO) of each participating hospital should select 2 to 4 nurses to attend the Academy. It is encouraged, but not required, for the teams to be from the same unit. It is important that there be at least two nurses, as it is very difficult for one nurse to affect change without a partner. Also, when teams become too large, it can be difficult for decisions to be made and for the entire team to own the project.

Internal Mentors

The CNO should also assign an internal mentor to their CSI team. It is recommended that this mentor be at the director level or above. This mentor is responsible for making sure the project has adequate resources and helps the CSIs to coordinate their projects with other departments and executive leadership. Without someone in this position, the CSI team will likely have difficulty gaining the momentum necessary to sustain the change.

External Coaches

Each CSI team can also be assigned an external coach. These coaches should be selected from nursing leaders in community at large. Care should be taken that there is no conflict of interest with the CSI site. It is also necessary for the coaches to have

relevant experience to each project. The role of the external coach is to provide the CSIs with an external viewpoint to help facilitate the program.

Target Outcomes

While it is vital that the project be created and implemented by the staff nurse CSIs, it can be helpful for the CNO to choose a particular target outcome based on the needs of the particular hospital. We encouraged the hospitals to choose a CMS never event or one of the items from the National Database of Nursing Quality Indicators (NDNQI). However, hospitals may want to target an indicator particular to the institution. The target outcome should be carefully chosen to fulfill a need at the hospital, but also to be small enough to allow the CSIs to focus on an achievable goal. The CSI team is then asked to address this issue through unique and innovative quality improvement solutions.

The CSI Academy

The duration of the CSI Academy can be modified depending on specific needs; however, it should be long enough for a project to be fully implemented and the results to be collected. Our CSI project lasted 16 months, and the CSI nurses attended 9 full-day didactic sessions throughout that time. At the beginning of the project, sessions should be held once a month; however, as the CSIs become more confident in their projects, the classes can be held less often.

During these sessions, we instructed the CSIs in leadership skills, project implementation and evaluation, data collection and analysis, strategic communication, and social entrepreneurship. It can be helpful to invite speakers with specialized knowledge on these subjects to facilitate part of a session and to provide information and experiential learning.

At the end of each session, we asked the CSIs to fill out an evaluation form. This is an important part of the Academy, because each cohort of CSIs is different with unique needs. Based on this feedback from the nurses, the curriculum can be modified

accordingly. For instance, nearly three months into the program, we received feedback that it was difficult for the nurses to find time to work on their projects due to their schedules. In response to this concern, the next CSI session was dedicated to project work. In addition, subsequent sessions included several hours of team work time. This project work time had the added advantage of allowing the CSIs to receive guidance from the Center staff directly related to their issues.

The CSI Curriculum

Session One

- Meet and Greet (30 minutes)
 - Purpose of the CSI Academy and its objectives
- Creativity and Risk (1 hour)
 - Describe the nature of creativity.
 - Discuss techniques for promoting innovation.
 - Describe what drives innovation.
 - Demonstrate the use of a structured technique to develop creative responses.
- Successfully Facilitating Your Change Team (1 hour)
 - Identify group decision making skills.
 - Explain conflict management skills.
 - Apply these skills through group exercises.
- Model for Improvement (1 hour)
 - Explain the PDSA change cycle.
 - Explain the concept of reliability as it applies to data.
 - Explain how tests of change can be used in CSI projects.
- Project Identification (90 minutes)
 - Discuss each CSI indicator.
 - Describe how to set parameters around the CSI project.
 - Discuss barriers that may present while working on the project.
 - Develop strategies from “other industries” that may work with creating the CSI projects.

Session Two

- Understanding Your Personal Leadership Profile (90 minutes)
 - Explain how you will use the strengths of your leadership style to influence others
 - Demonstrate understanding in a group exercise.
- Strategic Communication (2 hours)
 - Explain the key aspects of strategic communication.
 - Demonstrate understanding in a group exercise.
- Understanding and Using Data (75 minutes)
 - Describe how to evaluate trends in quantitative data
 - Discuss the concept of reliability
 - Understand how reliability and measurement issues relate to individual projects

Session Three

- CSI Project Work (All Day)

Session Four

- Project Updates and Troubleshooting (90 minutes)
- Expectations for CSI Projects and for presentations for the Innovation Conference (90 minutes)
- CSI Project Work (3 hours)

Session Five

- Maximizing Your Vision for Change (3 hours)
 - Discuss the theory of social problems as it relates to an identified problem/challenge in the participant's work environment.
 - Identify appropriate intervention strategies to address the cause/correlate of the social problem.
 - Discuss the principles of participatory change and internalization of innovation.
- CSI Project Work (3 hours)

Session Six

- Maintaining Focus Through Advanced Quality Measurement (1 hour)
 - Discuss specific measurement issues related to the quality improvement projects.
 - Investigate ways to minimize measurement error.
 - Define generalizability.
 - Outline threats to internal and external reliability in a specific initiative.
- Business Case for Quality (1 hour)
 - Define what it means to create a business case for change.
 - Describe ways to calculate the business case.
- Stakeholder Analysis
 - Describe the importance of stakeholder analysis in the work of change.
 - Analyze how to influence your organization at a variety of levels.
 - Describe the right way to access community venues with your project work.
- CSI Project Work (3 hours)

Session Seven

- Prepare CSIs for Innovation Conference presentations (2 hours)
- CSI Project Work (3 hours)

Session Eight

- Project Updates and Troubleshooting (2 hours)
- Discussions with the C-Suite (1 hour)
- CSI Project Work (3 hours)

Session Nine

- CSI Project Presentations to CNOs, mentors, and coaches (3 hours)
- Final Presentation
 - Identify the characteristics of healthy work environments.
 - Describe the steps to develop confidence.
 - Discuss how attitude can make the difference in your life & influence your work place.
 - Discuss your power of one & the power of nursing that positively influences patient care.

Evaluation

Ongoing Evaluation

The CSI participants evaluated each session to provide feedback for future CSI Academy sessions. Our evaluation forms had both 3- and 5-point Likert scales, and they evaluated the session objectives, the speakers, and the extent to which the session would impact their practice. The evaluations also allowed for qualitative comments at the end. End of the session evaluations can be tailored to specific needs

Halfway through the CSI Academy, we gave the CSIs a survey to determine the extent they were utilizing their external and internal mentors. This survey used qualitative measures to ask what was helpful about the coaches and what the barriers were. This type of mid-point evaluation is helpful in determining if changes need to be made to the format of the Academy or if there are CSI teams that do not feel they have the support they need in order to move their project forward.

These ongoing evaluations are critical to the success of the CSI Academy. It is important to allow the Academy to be continuously modified based on the feedback of the nurses themselves.

Ending Evaluation

At the end of our first CSI Academy, an external evaluator conducted focus groups to determine the experience of being a CSI nurse. She aggregated the comments in group format to allow for confidentiality of the participant responses.

Our external evaluator also created a brief, electronic survey for the CSI nurses and other Center participants in order to understand their overall experience. This allowed for quantitative evaluation.