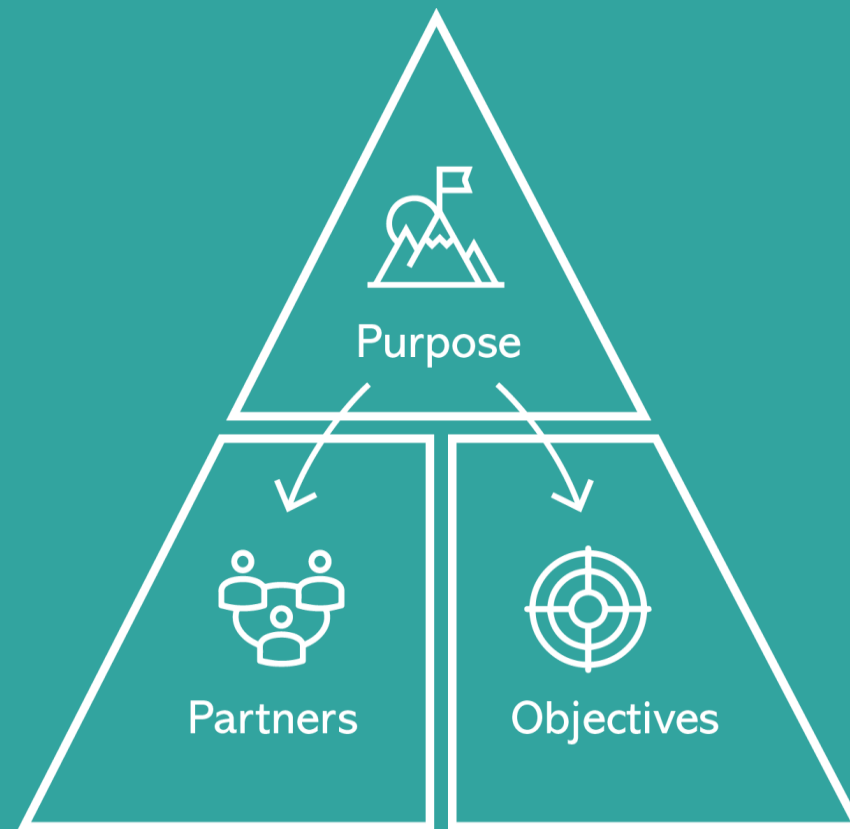




# Facilitator instructions

## Initiation Toolkit for value-based care living labs

Philips Design

# When to use?

*Before this toolkit can be used the type of lab and topics should be set. This toolkit is useful in follow-up conversations of the initiation phase of a living lab that aims for transformation to value-based care.*

*The toolkit contains three tools:*

- 1) Identify the purpose*
- 2) Find partners*
- 3) Define objectives*

*No tools do exist yet for topic selection and tdefining the type of lab, in future situations these tools can be developed.*

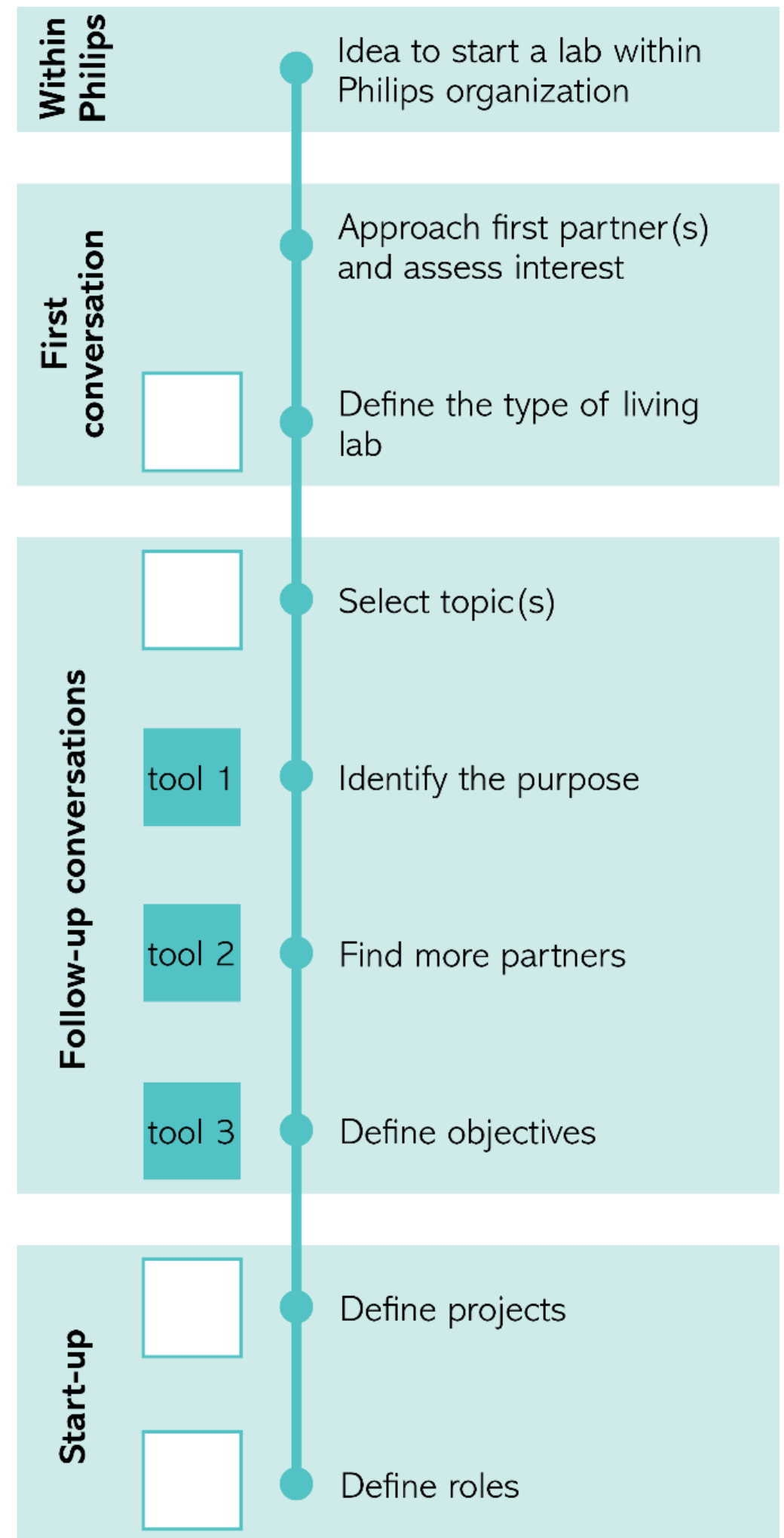
*Besides, the toolkit can be extended in use during the start-up a living lab.*



Tools in this toolkit



Tools that are not existing yet



# Facilitator role

The facilitator has an important role in the use of this toolkit. This role is ideally executed by one person from Philips design that has the capabilities to facilitate co-creation session and visualize in Adobe programs.

The role includes responsibilities before, during and after sessions.

## Before

- Prepare the materials
- Set-up meeting dates, invites and arrange location

## During

- Facilitate discussions and brainstorm
- Keep track of time

## After

- Organize created materials and document outcomes and decisions
- Visualize outcomes of sessions

# How to use this slidedeck

*Italic text in this booklet is ment for the facilitator only*

Text in regular, or with “brackets” needs to be explained by the facilitator

Actions for facilitator during the sessions

Action for the participants: a questions or assignment for the group

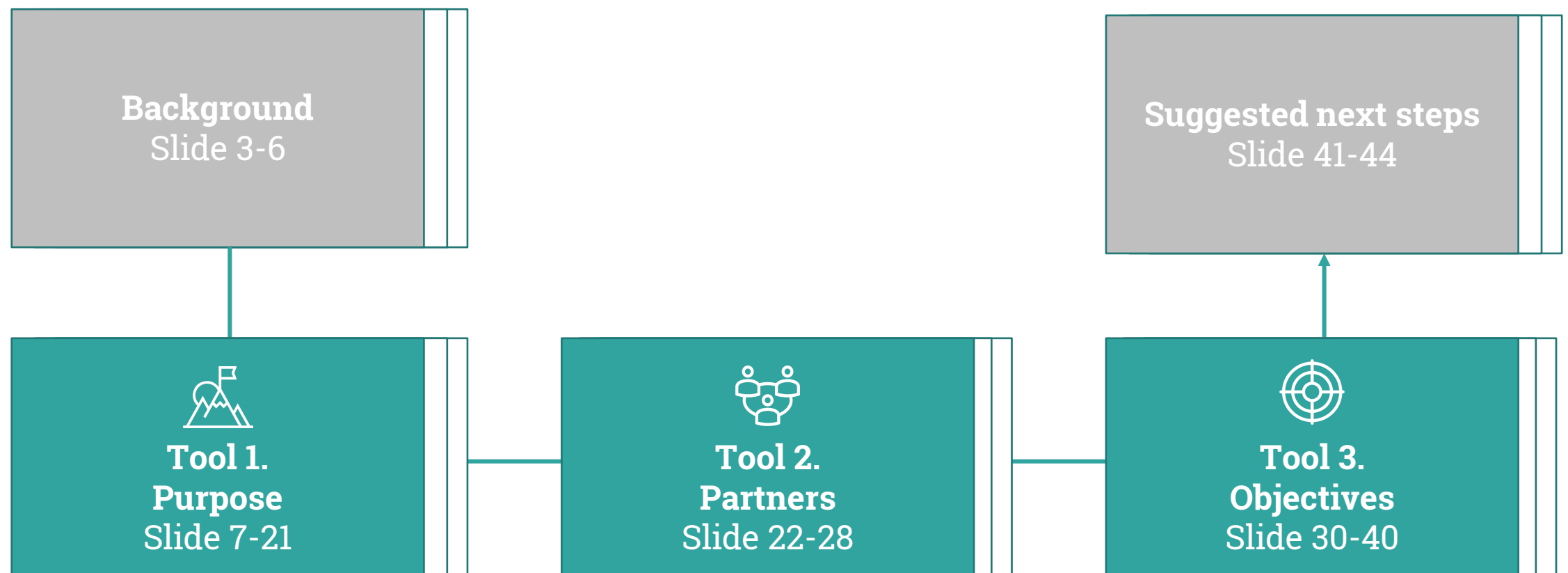
Materials of the toolkit that are needed in this step are mentioned in grey

Elements with a box around it are directing to elements of the main slidedeck

# Content main slidedeck

*This instructions help to use and present the main slidedeck. This is the overview of elements in the main slidedeck, this overview is also included in the main slidedeck.*

- You can customize the elements you need for your situation (for example only use tool 1)*
- In the ppt the slides are clickable and direct you to the corresponding slide immediately*



*Use the indicators at the top of the slides to track progress.*



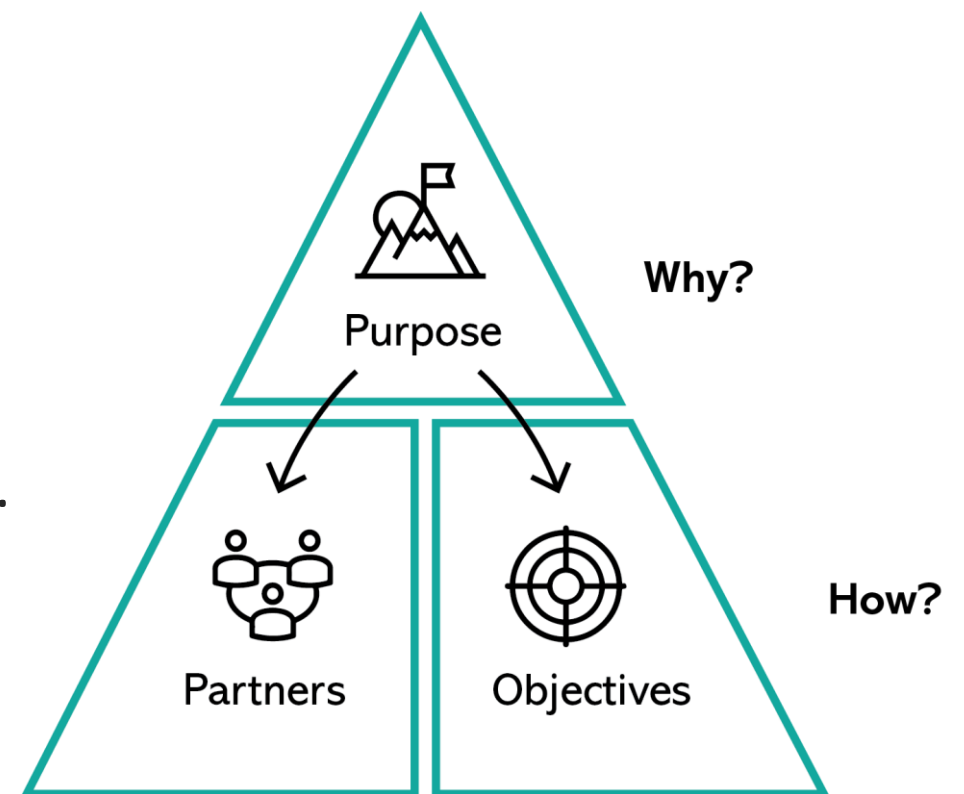
# Background

Good to know before using the tools

# Background – structure

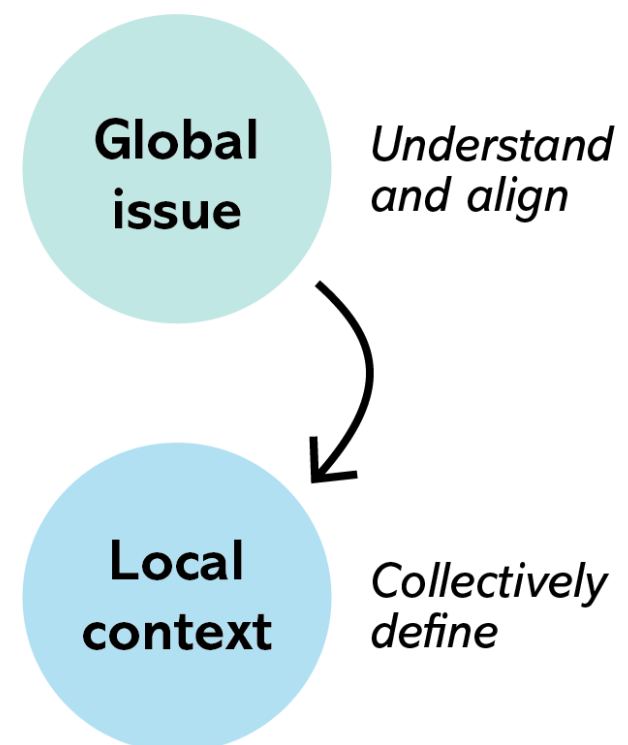
Suggested to start with defining the purpose (tool 1) because this underlines the 'why'.

Based on the purpose partners (tool 2) and objectives (tool 3) can be discussed, to move the discussion towards 'how' to achieve the purpose. There is no specific order in which partners and objectives tools need to be used.



The transformation to value-based care is a global issue. Existing theory is general needs to be made context-specific.

In the tools, the global issue is addressed first, with the goal to understand and align on the issue. Next step is to make the global issue context specific and define what this means in a local setting.





Tool 1.

Define purpose

7 steps to a local purpose visualization

# Preparation

## Actions

*Prepare the dates and meetings and change dates in main slide deck (slide 7)*

*Invite attendents*

*Reserve a room with whiteboard/flipover and projector/screen*

*Make sure people reserve time to conduct research between session 1 and 2*

## Materials

*Print sheets on preferably A2 (purpose sheet nr 1, 2, 3, 4 & 5)*

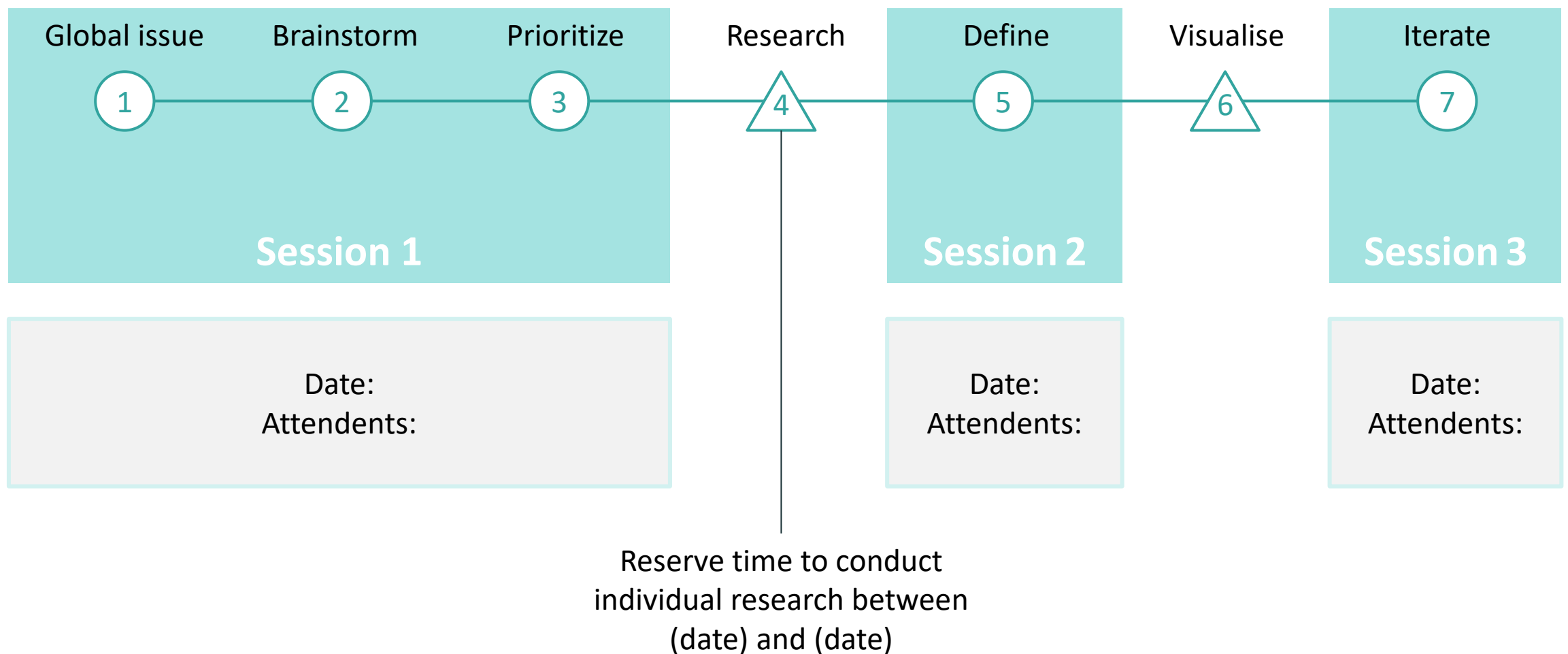
*Bring post its and pens in different colours*

# During the meeting

Set-up all posters and the presentation in the room.

Start with a welcome and round of introduction if people are new to each other.

Explain the planning for this and for the next sessions, (adapt and use the slide below).





## Purpose sheet 1

### Go through the global visualization poster

“The toolkit is structured in a global – local way”, (this is mentioned in the background section already).

“First we are going to look at the global level of the issue, next we are going to define what we are going to do in the local setting. We are going to use the global issue as inspiration for defining our local issue.”

“Global issue is build up from challenge, vision and enablers, I will take you through them step by step.”

### Next slide

“Globally we see systemic challenges”. (Name some elements of the visual you see on the slide, for example: staff burnout, rising costs)

“The challenges appear in four categories: patient satisfaction, staff satisfaction, health outcomes and rising costs.”

“These four categories show that the challenges within the current situation are systemic challenges. Therefore the system should be addressed.”

“The quadruple aim is a suitable framework to address the challenges. This leads to the following vision: value-based care addressed by the quadruple aim.”



## Purpose sheet 1

### Next slide

“This shows the ideal situation for a health system”

*Mention the four elements of the quadruple aim.*

### Next slide

“Micheal Porter, the international health organization and Philips have published studies about how to realize this transformation. It appears that five enablers are key in transforming to value based care. Those are ...” (five enablers shown in slide)

### Next slide

## Discuss understanding

Is something in the overview unclear?

Who does agree on using the quadruple aim as a framework to guide the transformation? (hands up)



## Purpose sheet 2

Highlight which challenges in the global issue we recognize

Go to sheet 2, hand out post its if not on table yet

Which of the global challenges do we recognize?

Highlight the ones on the paper that are mentioned and agreed

*If people bring up ideas, explain they have to write it down on post its*

Brainstorm on local challenges

Take 2 minutes to write down your ideas and examples in the highlighted areas

*Give a few examples of local challenges*

Organize challenges on a map

Next slide

“We are going to categorize the ideas in 2 areas: systemic and non-systemic challenges.”

“The challenges that are systemic challenges often affect multiple stakeholders and addresses the socio-technical system. This means that not only a product or one service is part of the concern, but a bigger system around it.”

Can everyone stand up, come to the sheet and bring their post its?

Organize the challenges on the quadruple aim and place it in one of the circles.

*Check if it is relevant to cluster multiple challenges into a bigger challenge*



## Purpose sheet 3

### Prioritize challenges on impact and ability to act

#### Bring sheet 3

Explain axis that appear in slide “Impact: How much value does it have if we solve this challenge. Ability to act: Can we together act upon the challenge(s)”

Take the post its from the old map (systemic circle) and stick on the prioritization map

*Place it on a place you think is good and ask if someone disagrees. If someone disagrees go into a small discussion and position it on the right place.*

We now have to select a number of challenges from the upper right corner that we see of value to pursue in this lab.

*Check if the challenges together are a good match*

Take a selection from the upper right corner and ask if others agree

Take the post its and put them on the next sheet (4)



## Purpose sheet 4

Map out what we do already know and what we don't know

Know we are going to find more in depth information of the challenges we selected

Write on post its with green colour: What do we already know about the challenges?

Write orange post its: What information is crucial but missing?

Define who is going to do additional research

To make this overview complete we need to get a better understanding on the orange topics. We are going to find out more in between this session and next.

Doing research could be: internal data on outcomes, external data, insights based on conversations, survey outcomes, customer journey maps.

Create a table on white board or flip over and take the red/orange post its

Create columns: 1) topic 2) who is going to do research 3) how?

Fill in the table and direct responsibilities

Repeat that it needs to be finished at the deadline as discussed before.



## Purpose sheet 4

### Conduct individual research

Bring up back the challenge sheet (4) from last time & explain what the agenda is for today

Ask attendants to present the facts and insights from individual research to each other

Complete the map of challenges & insights and remove missing parts/improve wrong ones

*Important to archive the research done and insights gained, make the outcomes findable for future situations*



## Purpose sheet 5

### Map the challenge, vision and enablers

Take the outcomes from sheet 4 and place them on sheet 5.

Now we know the challenge, we will move to the vision. Stay visionary, it is about the ideal situation.

Come up with a vision statement for each challenge, what is it that we want to realize?

For inspiration, you could look at the global issue and see if elements are relevant for now

Write down vision aspects on post its and paste them on sheet 5

Discuss the five enablers of the global issue.

Order the five enablers on importance and write them down on sheet 5.

*If arguments are mentioned that are considered relevant to store on the poster as well, write them down.*



## Digital visualization of the local issue

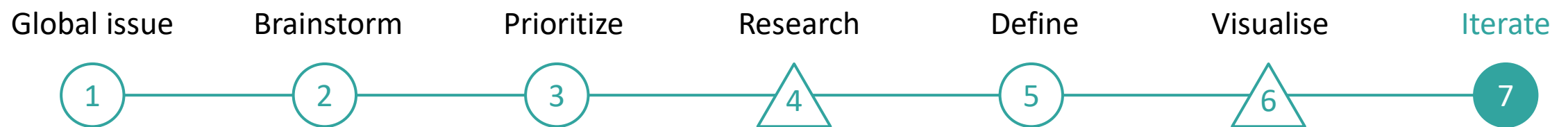
Worksheet 5 is going to be the basis for the visualization of the local issue

The style will look like the global poster, if possible.

The visualization will be done by (some from Philips).

The poster will be going through one round of feedback.

Visualize the poster in Photoshop



## First visualization

Suggest improvements

Print the visualization and bring it to the next session

Ask for suggestions for improvement

Write down remarks on the poster

Verify that if the changes are executed, the poster will be final

## Final visualization

Final visualization

Update the visualization

Print the visualization and hang it at a visible place

*Note: this session can be combined with a first session for partners/objectives*



# Tool 2.

# Identify partners

5 steps to understand the partner ecosystem

# Preparation

## Actions

*Prepare the dates and meetings, invite attendants and reserve a room with whiteboard/flipover and projector/screen*

## Materials

*Local purpose visualization from tool 1*

*Print partner sheets on preferably A2 (nr. 1, 2)*

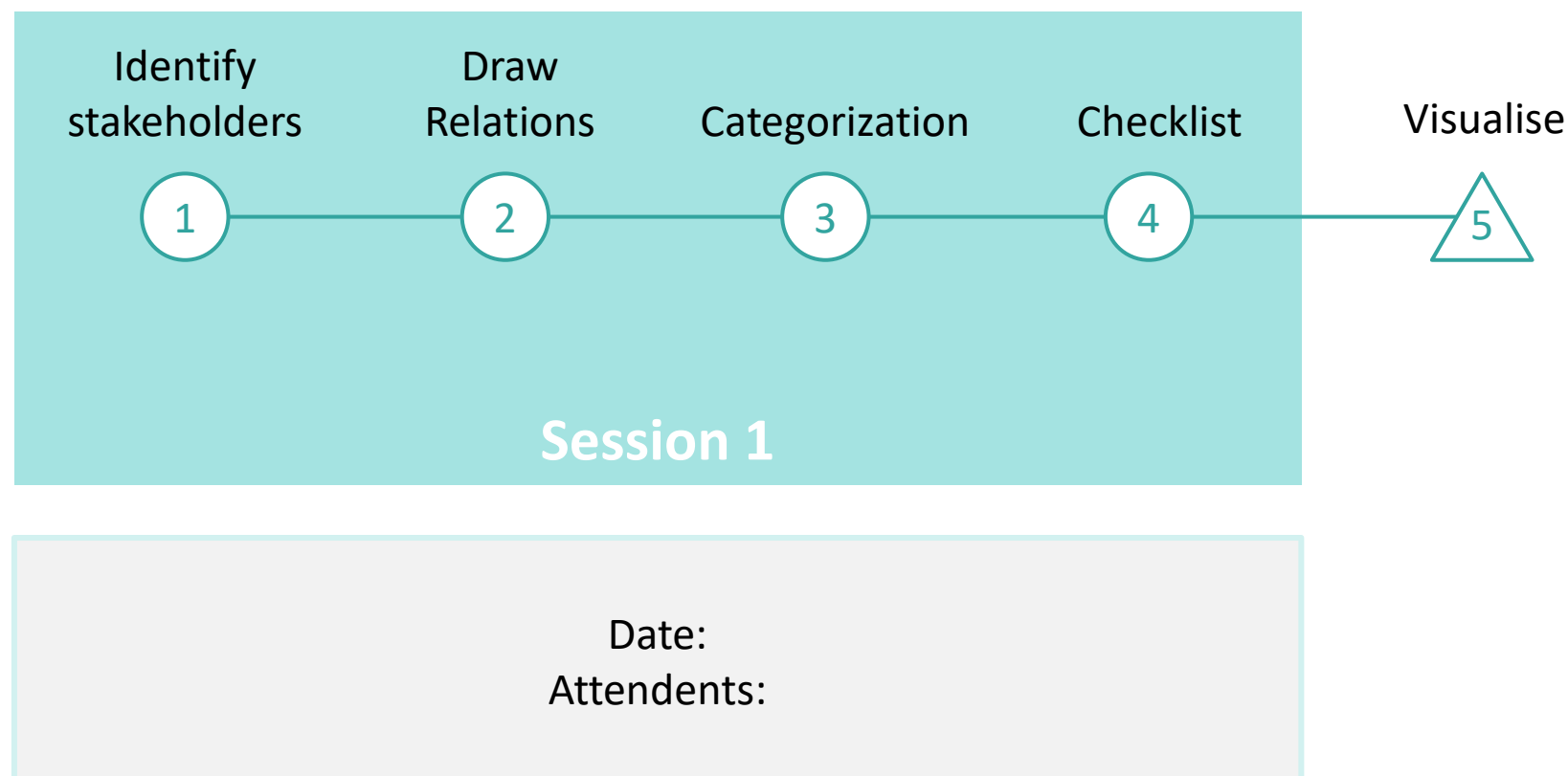
*Bring post its and pens in different colours*

*Preferably a room with a whiteboard, else a flipover*

# During the meeting

Set-up all posters and the presentation in the room.

Explain the planning for this and for the next sessions (adapt and use the slide below).





Partner sheet 1   Whiteboard

## Take one of vision elements as a starting point

The vision probably consists of several aspects. Propose to start with the element that is seen as most important.

Explain the other aspects will be covered later.

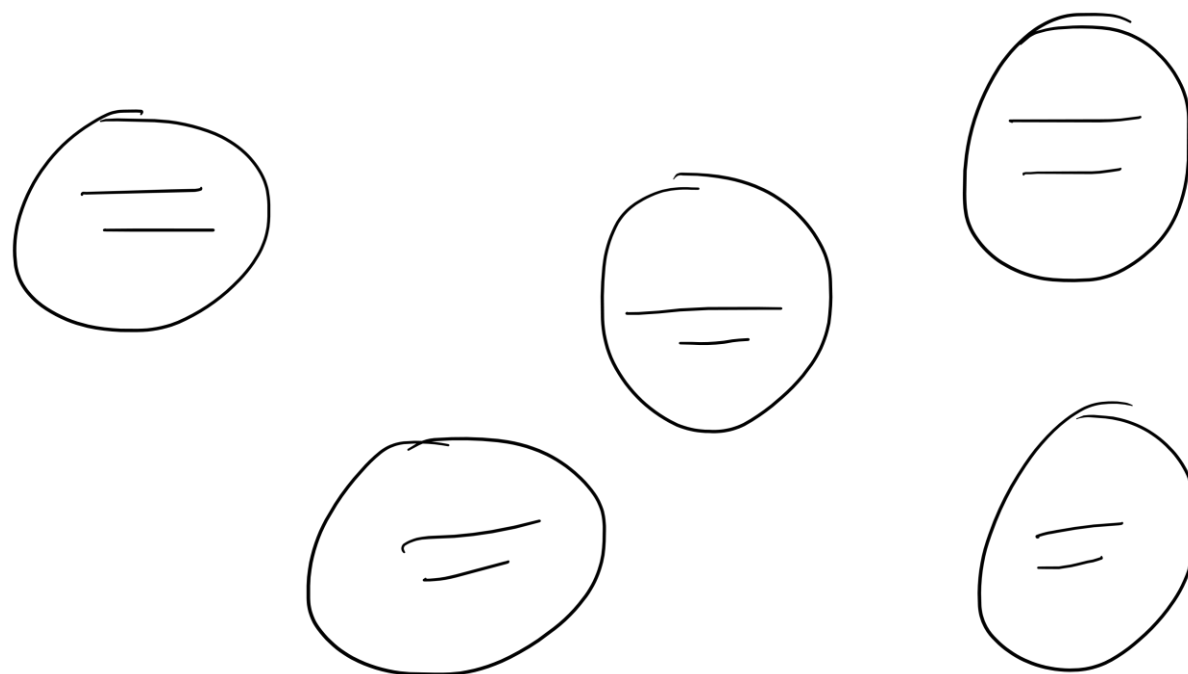
Write down the aspect on a whiteboard

## Ideate who is needed to realize the vision

We will try to understand mechanism behind this vision. Therefore we want to identify first which stakeholders are influencing the goal.

Who do you think are important enablers or influencers of this goal?

Write down the stakeholders that are mentioned and within a circle leave enough space between. Example:





## Whiteboard

### Draw relationships between stakeholders

Now the goal is task is to define the interactions between the stakeholders. We need to draw lines between the stakeholders and shows how the vision can be realized.

Next slide, explain the example of how this can work

Ask which relations they see

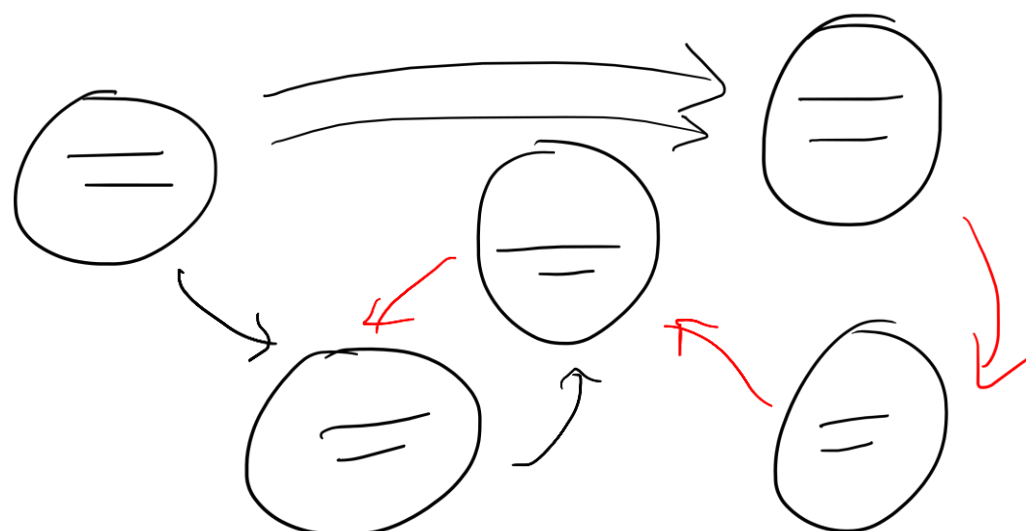
Draw the relations between the stakeholders

### Repeat for other goals

Start with another vision element and create a stakeholder map for this goal. If stakeholders are similar, and it fits in the existing structure, continue with that. If it is too messy or full, start a new one and combine them later on.

If you choose to add to the existing one take another marker colour, in order to keep the different vision aspects seperate. (example below)

If the number of maps and arrows becomes too much, it is needed to prioritize relations. Highlight the arrows that need most attention.





Whiteboard

Partner sheet 2

## Divide the stakeholders in 3 groups

Now we need to consider which of those stakeholders are important to collaborate with. We could collaborate on lab level, or only on project level.

Lab partners are probably involved in multiple elements of the vision. You could see as different coloured arrows connected to this stakeholder.

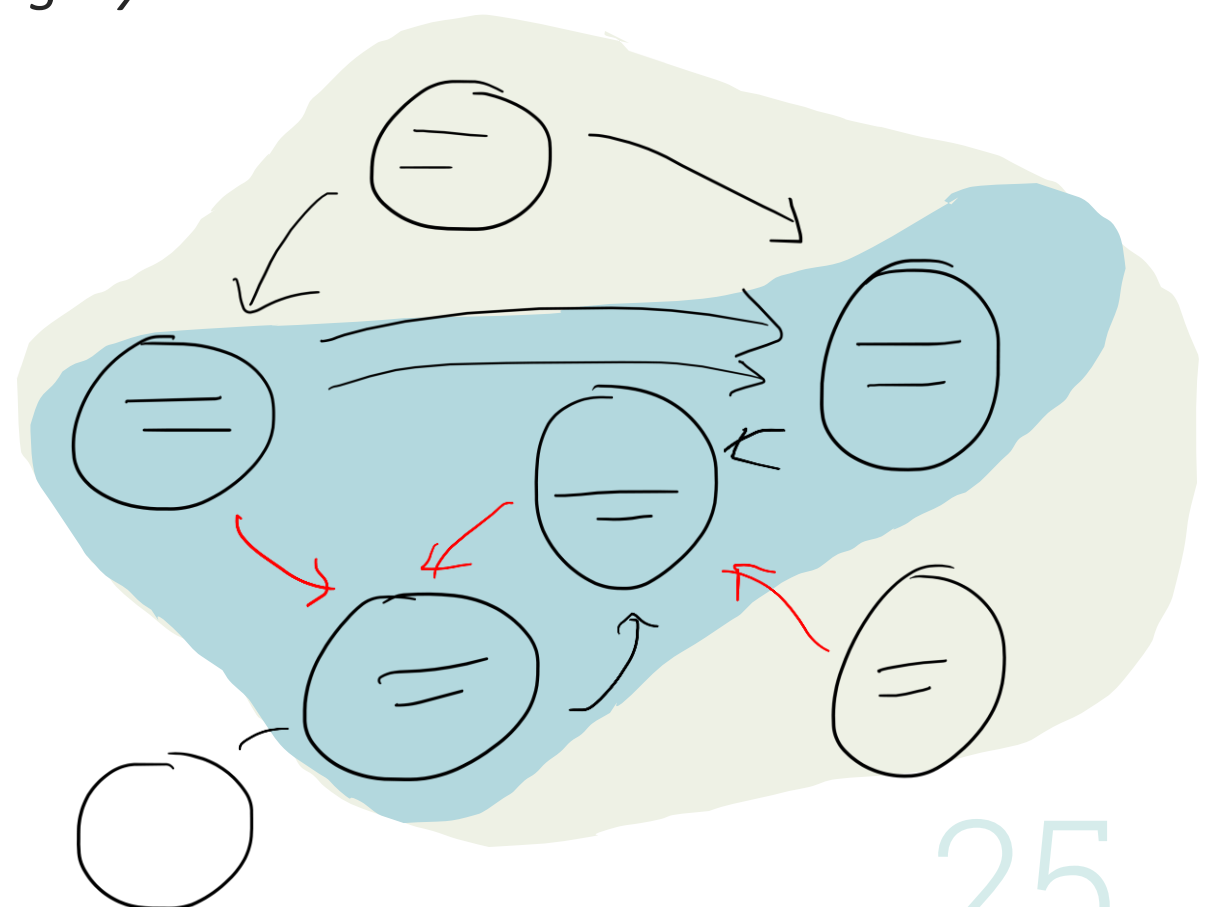
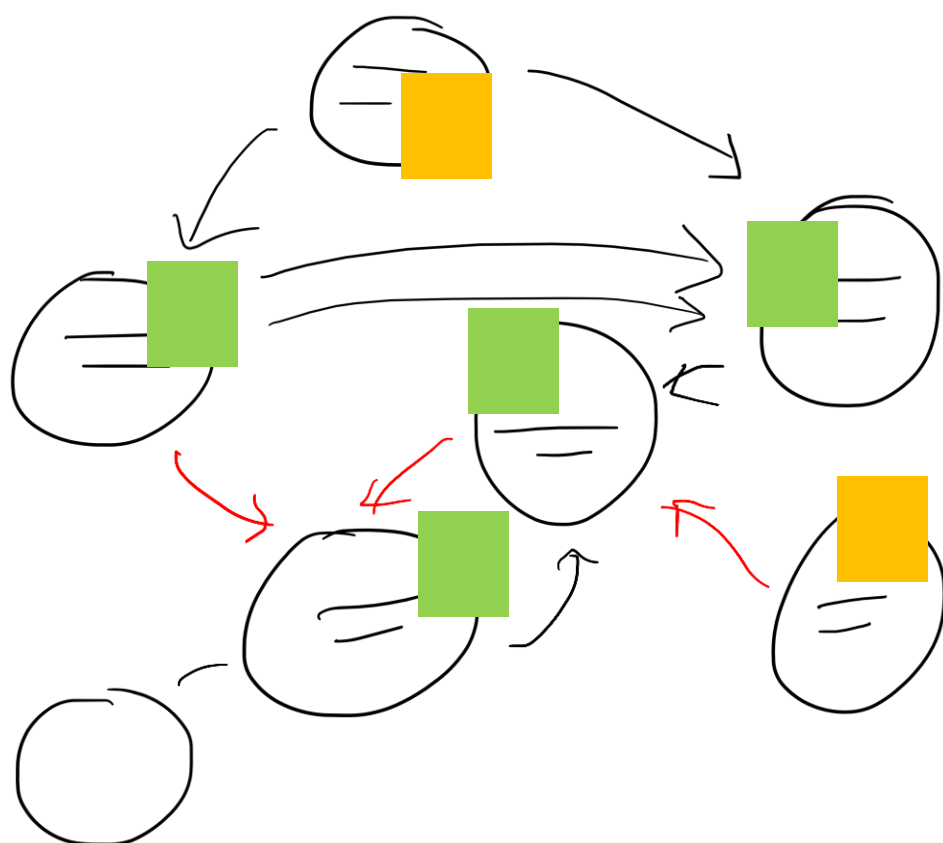
Project partners are probably involved in only one of the elements of the vision.

If one of the stakeholders on the board is considered not that important, we could also group it under 'other stakeholders'.

**Use post its with different colour to mark which stakeholders are in which groups.**

(for example green for lab stakeholders and yellow for project stakeholders). Do suggestions for the roles of each of the stakeholders yourself and ask for feedback from other participants.

If every stakeholder is marked with a colour and everyone agrees, *draw lines around the group of partners considered in each category.*





## Partner sheet 2

### Check if the ecosystem is sufficient and sustainable

Are all lab partners benefiting in the current system?

Can we together realize our vision?

Do we have the data required?

Do we have the capability to scale up successful interventions?

*Check on those criteria and improve the stakeholder map if required*



## Partner sheet 2

### From whiteboard to paper

During the session: map the whiteboard version on paper in a neat way.

For later use, make the paper version also digital



# Tool 3.

# Set objectives

5 steps to specify objectives and outcome measures

# Preparation

## Actions

Prepare the dates and meetings, invite attendants and reserve a room with whiteboard/flipover and projector/screen

Edit worksheet 2 in Photoshop/Indesign and include the outcomes of tool 1 in the placeholders of the work sheet. This also needs to be inserted in the main slidedeck.

## Materials

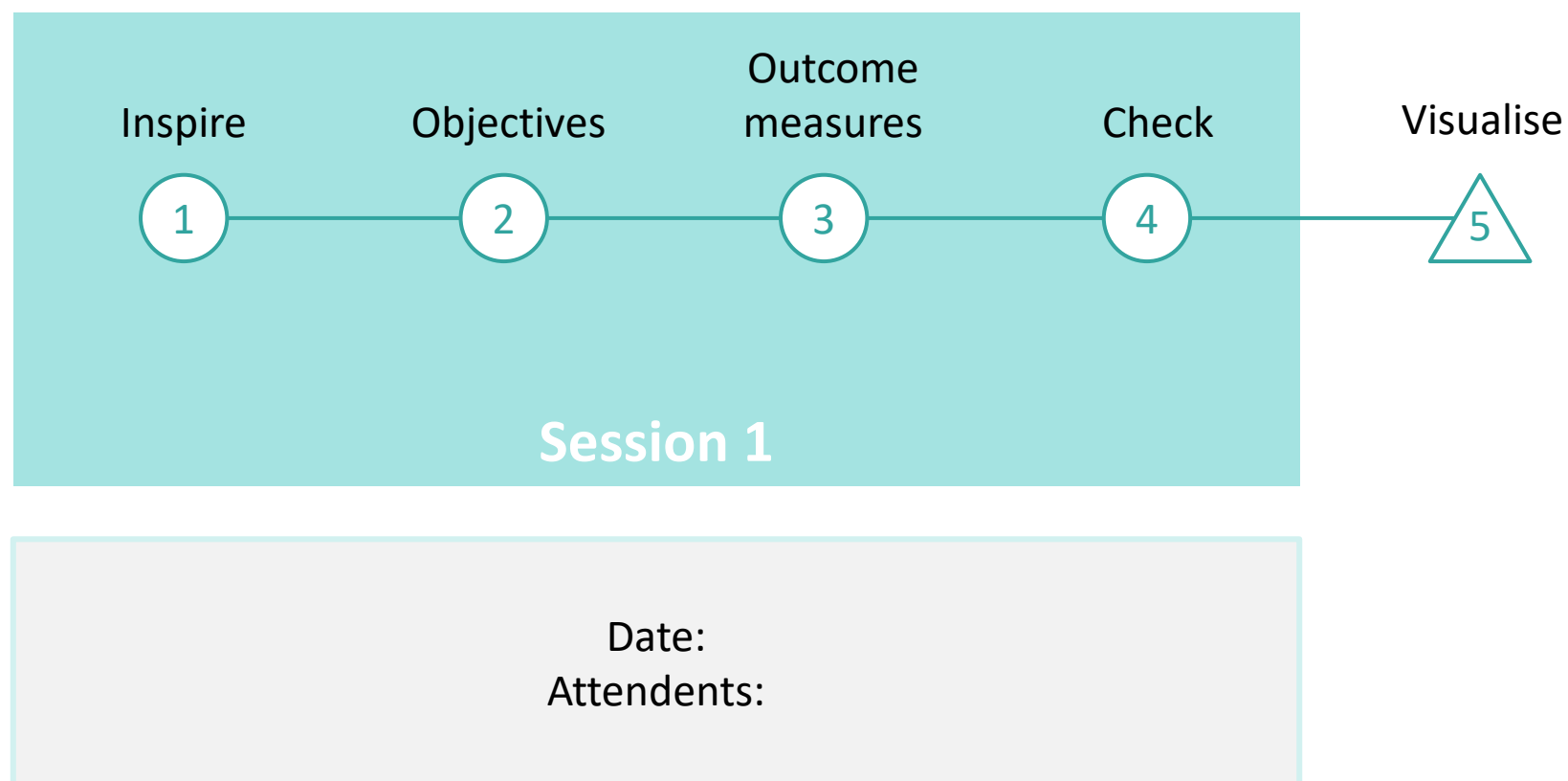
Print sheets on preferably A2 (Objectives sheet nr. 1, 2)

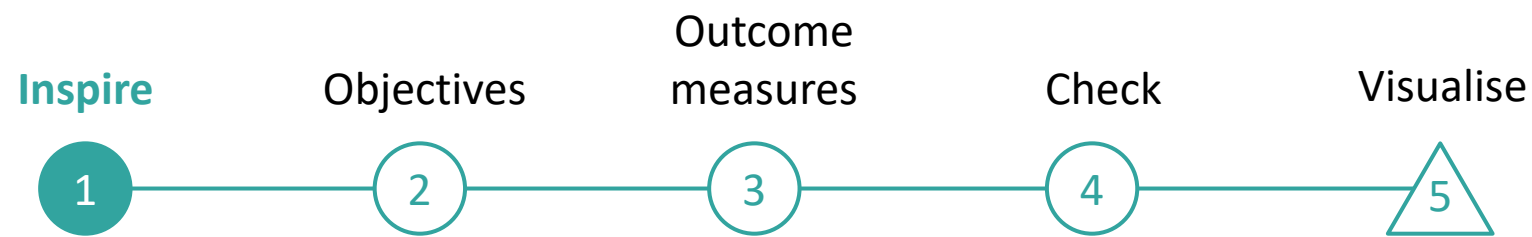
Bring post its and pens in different colours

# During the meeting

Set-up all posters and the presentation in the room.

Explain the planning for this and for the next sessions (adapt and use the slide below).





Objectives sheet 1

Objectives sheet 2

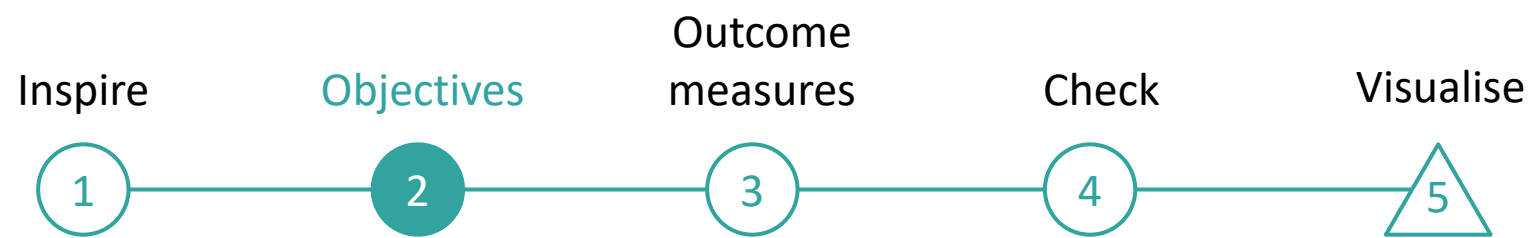
## Inspire

Show objectives sheet 2, and reflect on the vision aspects from tool 1.

In this session the vision will be made more specific, so we are going to ask ourselves ‘how’ questions. How is this going to be realized? How is this going to be measured?

What helps us to define objectives in line with the quadruple aim is the inspiration sheet (objectives sheet 1). In this overview we see how we should understand and use the quadruple aim.

With the local vision and the quadruple aim inspiration sheet in our mind, we are going to brainstorm on objectives.



Objectives sheet 1

Objectives sheet 2

## Define SMART objectives

Explain the concept of smart objectives.

|   |            |
|---|------------|
| S | Specific   |
| M | Measurable |
| A | Achievable |
| R | Realistic  |
| T | Time bound |

Give some examples of a vision and linked objectives

Vision: Better patient experience for elderly people

→ Objective: Zero complaints from patients in 2025

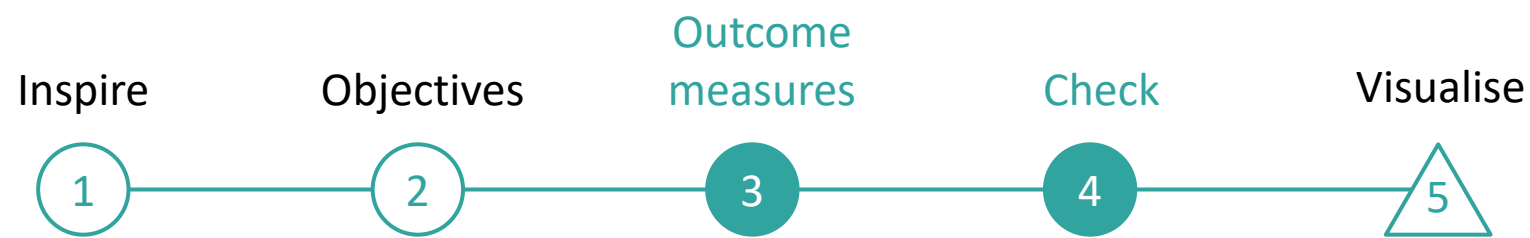
Vision: Less administrative burden physicians

→ Objective: Time spend on administration reduced with 25%

**Write down possible objectives individually (2 min)**

Move to objectives sheet 2 and paste objectives in the overview.

*If too many objectives have been written down, limit to 1 or 2 per aspect of the vision that fit best with the vision.*



Objectives sheet 1

Objectives sheet 2

## Define outcome measures for the identified objectives

The first circle of sheet 2 needs to be filled with good objectives.

How these objectives can be measured?

Write down the answers on postits

Continue till a balanced set of objectives and outcome measures is obtained

## Checklist objectives and outcome measures

Do a final check on the objectives and measures and check if everyone agrees with this set.

- Are the objectives SMART?
- Is the outcomes measure in line with the transformation?
- Can we measure this outcome? (or do we need an additional partner)

## Visualize

Visualize the outcome of the session, make it digital, and use it for future steps.

# Suggested next steps

After tool 2 and 3

# Suggested next steps

After having mapped the ecosystem (tool 2):

- Approach new partners and convince
- Onboard new partners
- Discuss roles & responsibilities of partners
- Define organizational structures (for example steering)

After having defined objectives (tool 3):

- Define projects
  - Which objectives are addressed in which projects?*
  - Who need to be involved in which project?*
- Determine status at moment zero
- Create dashboard to track progress
- Determine how and how often progress is going to be evaluated