RESEARCH PMO BROWN BAG LUNCH

Requirements, Reporting, & Research: An Investigative Look

December 12th, 2022 @ 11:30am – 1pm

PRESENTED BY:
Research PMO
Strategy Integration

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ICE BREAKER – WRITE IN CHAT!

- If you could put yourself as a character in any book or movie, what would it be?

WHY ARE WE ALL HERE?

AGENDA FOR TODAY'S WEBINAR:

- Housekeeping
- Introductions
- Preview of Dashboards
- Highlight best practices for getting started
  - Project Charter
  - Formal Requirements Gathering
- In depth dashboard examples
- Methods of discernment when deciding what to track
- High level Do's and Don'ts recap

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HOUSEKEEPING

What to keep in mind for today's webinar:

- o We encourage everyone to turn their camera on to increase engagement

- o Everyone is <u>muted</u>, if you have a question or comment, please:
  - Type your question in the <u>Chat Box</u>
  - Ask a question using the <u>Raise Hand</u> function
  - If un-mute, please state your name and title/department

- o Slides/webinar materials will be shared post-session

- o The Research PMO values your opinions & feedback:
  - Please complete our post-session survey

INTRODUCTIONS – RESEARCH PMO AND STRATEGY INTEGRATION

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RESEARCH PMO OVERVIEW

Our Vision

"In support of Research Administration, we will plan and execute small, medium, and large projects, programs, or process improvement initiatives. Our management approach will assess your goals and objectives and develop a plan that best suits your needs."

Services Provided:

- Advisory, Audit, and Governance solutions
- Project Mgmt. and Business Analyst Resources
- Process Improvement and Change Management
- Project Management Education
- Project Management Tools and Templates

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STRATEGY INTEGRATION OVERVIEW

Our Vision

To drive alignment between CHOP's strategic priorities and the operational actions that contribute to achieving those priorities
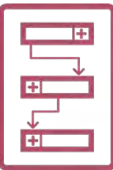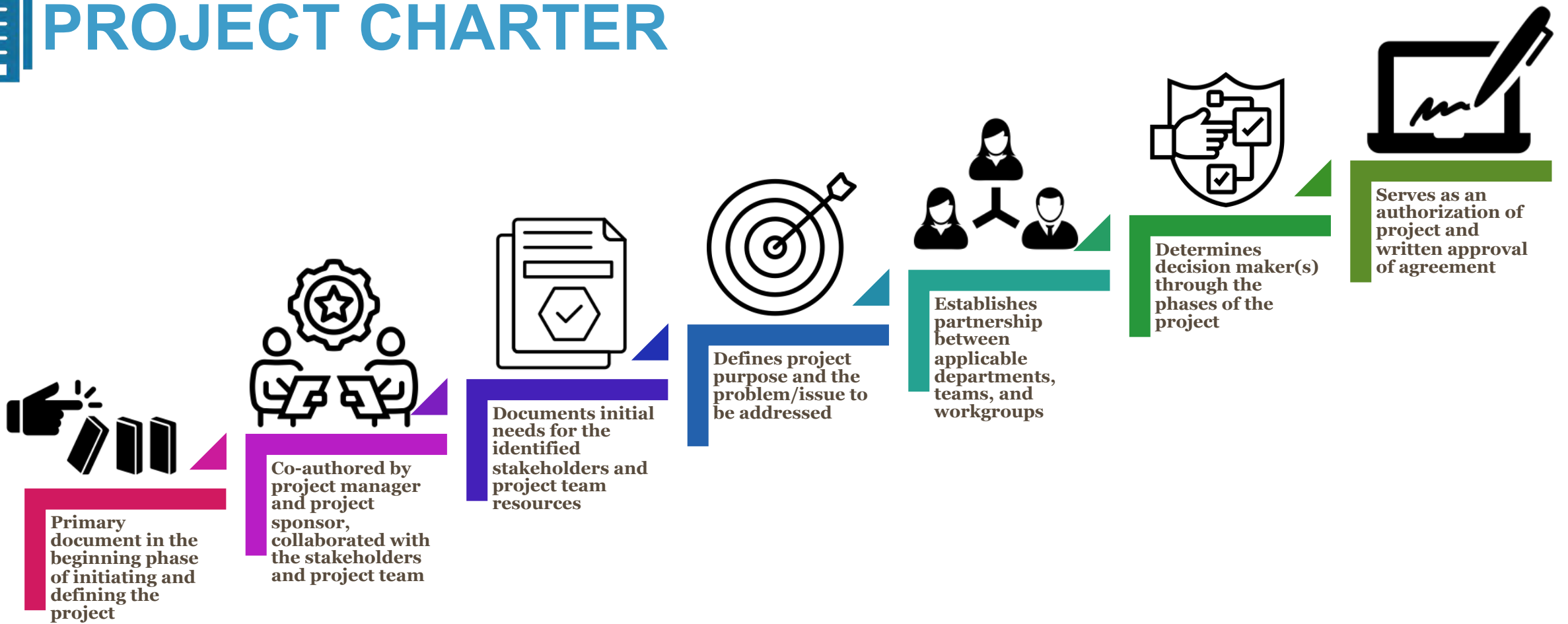
Services Provided:

- Business process improvement
- Business consulting
- Program Management
- Project Management

QUIZ TIME

Please respond to the poll requests

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PROJECT CHARTER

Primary document in the beginning phase of initiating and defining the project

Co-authored by project manager and project sponsor, collaborated with the stakeholders and project team

Documents initial needs for the identified stakeholders and project team resources

Defines project purpose and the problem/issue to be addressed

Establishes partnership between applicable departments, teams, and workgroups

Determines decision maker(s) through the phases of the project

Serves as an authorization of project and written approval of agreement

PROJECT CHARTER ELEMENTS

Develop Goal Statement	Mission/Strategic Plan	Metrics & Key Performing Indicators (KPI)	Constraint Elements	Assumptions	Key Dependencies/Risks	In-Scope vs. Out-of-Scope
•What is the problem to be addressed?	•Why? •Overall Impact	•Success measures aligned with the goal of the project •Data points that will be assessed for their performance	•Time •Cost •Scope •Quality Standards •Risk Tolerance	•Project factors that are considered to be true, real, or certain without empirical proof or demonstration	•Buy-in and change management •If x does not happen, then it is a risk, and the project will not be effective or successful	•Defines the project boundaries •Informs the appropriate data gathering
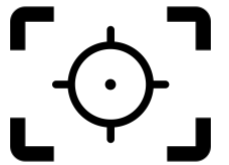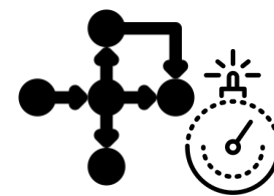
PROJECT CHARTER TO DATA
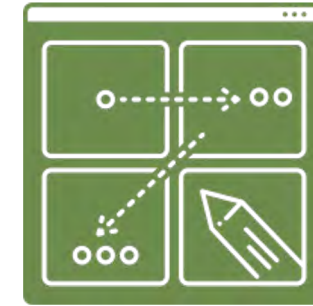
Determining metrics and bringing it back to data ⇨

1. Understand the purpose or goal of the project or work

2. Determine what critical success factors need to be fulfilled for you to succeed and achieve the goal

3. Take each critical success factor for the project or program and identify how you will measure its fulfillment

"A metric is made up of data, (Key Performance Indicators) KPIs are made up of metrics, and reports are made up of KPIs. Ultimately, reports are what get turned into analytical insights which bring value to the business and feedback to your data driven" projects. (Rennell, 2021)

FORMAL REQUIREMENTS GATHERING

- Goals of having the data available
  - Process efficiencies
  - Staffing needs
  - Visibility into all the current projects
    - Department reach
    - Ongoing studies
  - Accessibility of the data
    - Roles
    - Access and interpret the data themselves

FORMAL REQUIREMENTS GATHERING

- Is there a place to pull the data if it exists
  - Is the data accessible?
  - Is the data sensitive?
  - Is the data current?
- Does the data need to be cleaned, edited, or transformed?

- Decision point before moving forward
  - If data is not readily available, this can change the scope of the project
  - How do we *collect* the data?

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FORMAL REQUIREMENTS GATHERING

- Format of the data vs Format of the requirements
- Storytelling with data
- Raw data
- Narrative
- Data transformation
- Report Out Structure

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DATA COLLECTION

- Evaluate the effort to collect the data manually
- Which resources can perform this?
  - Dedicated resources who "own" the data?
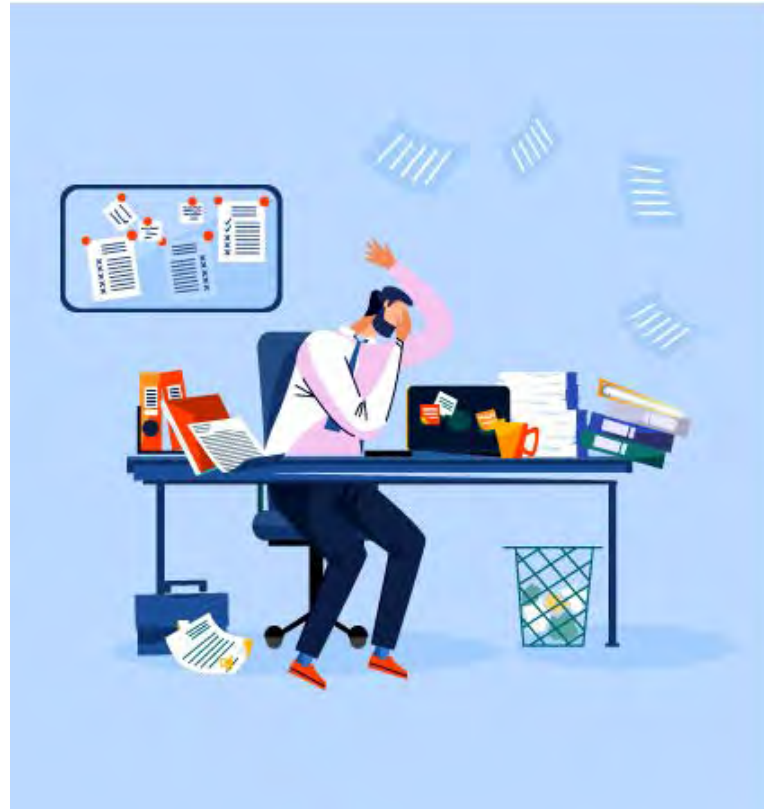 - All resources who touch the data?
- Set cadence/expectations for updates

- Leverage tools:
  - Smart forms
  - Surveys
  - Spreadsheets
- START SMALL
  - Phase in data collection tasks
  - Good things take time
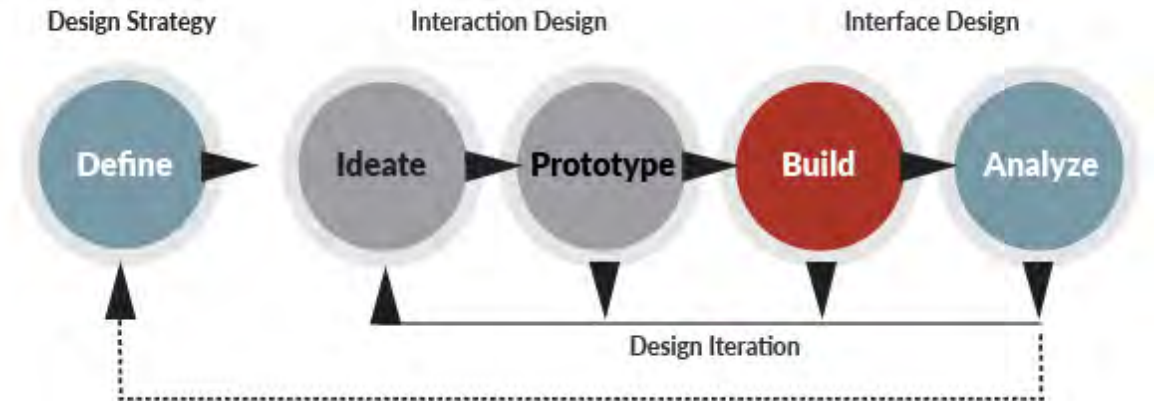
MANUAL DATA COLLECTION BREAKDOWN

1. Brain storming / discussion

2. Document

3. Organize

4. Review

5. Revise

6. Repeat (as needed)

QUIZ TIME

Please respond to the quiz pop-up

PMO DASHBOARD WALKTHROUGHS

- https://app.smartsheet.com/dashboards/MPGjQvQ9937CjxqhFqJ8mP7fq8pWQfJ3JwGqwjH1

WHO USES SERVICENOW?

IT SERVICES

ENVIRONMENTAL SERVICES

FACILITIES

Something's Broken

Daily CHOP Check-in Issue

Order Something

All Epic Requests

Something's Broken

Service Bar Appointments

Vaccination Center

Dashboards New

Recent   Owned by Me   Shared with Me   All

Other   Viewer

PMO Dashboard
Owned by System Administrator
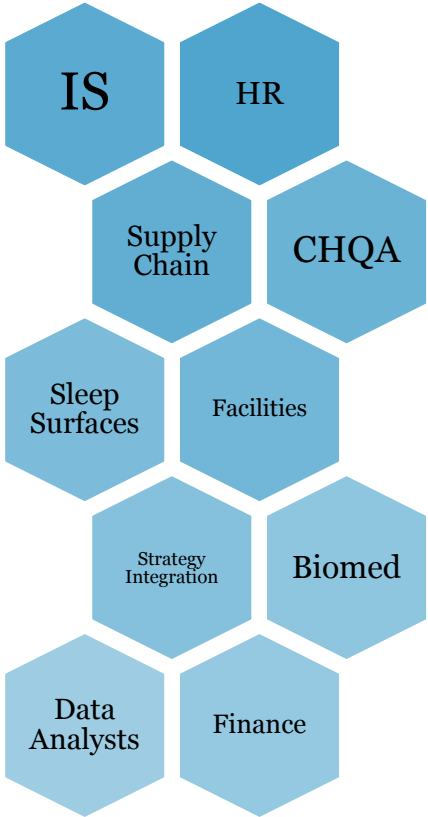
Have an Idea? Share it!

Share an Idea

HR & Payroll Service Portal

Now® Mobile
ServiceNow

ServiceNow Agent
ServiceNow

IS

HR

Supply Chain

CHQA

Sleep Surfaces

Facilities

Strategy Integration

Biomed

Data Analysts

Finance

ServiceNow Inquires?
Contact: Brian Maguire Jr.
maguirejrb@chop.edu

servicenow | Time Sheet Portal

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SERVICENOW DASHBOARD SAMPLE

Screenshare*

QLIKSENSE DASHBOARD SAMPLE

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Qlik Q Sense® Enterprise

SCHENKER

Streams

Everyone

IS PMO

Supply Chain

Everyone

Name

Inquires for QlikSense?: Recommended you start a discussion with the Data Literacy Program (dataliteracyprogram @chop.edu) or Review the Qlik Sense Consumer Guide @ CHOP Page

Access and Intake Call Center Analytics

Analytics Toolkit Selector

App Library

CDW Data Sources and Security

CHOP Sessions Monitor

Clinical and Environmental ...

COVID-19 Testing Dashboard

Enterprise Strategic Performance ...

Enterprise Telehealth Dashboard - Non-PHI.

Finance Daily Dashboard

Inpatient Capacity Management

Screenshare*

HOW DO WE BRING IT BACK TO THE RESEARCH

What data can be fed into a "Research Laboratory" Dashboard?

The circles contain:
- Lab Planning Initiatives Estimates of research space needs
- DEI Statistics: URM Funding mechanisms and Career Trajectory
- Operational features and techniques, Experimental Strategies
- Previous and Current studies, high level summaries of high throughput data
- Statistics on human health impact and populations at risk
- Publication Record, Funding, and other Scientific Awards

Research Laboratory Dashboard

WORD CLOUD

Please submit your responses

METHODS FOR DISCERNMENT - STORYTELLING

- Why is this project charter or data important to the organization
  - What's the mission behind it
- In an ideal world, what does this data help us to do?
- What are the barriers to telling that story today?
  - Visibility
  - Transparency
  - Accountability
  - Ownership

METHODS FOR DISCERNMENT - KNOW YOUR AUDIENCE

- Who, what, where, and why
  - **Who** is going to consume this information?
    - Leadership / Executives
    - Directors
    - Subject Matter Experts
    - Stakeholders
    - End Users
    - Researchers
  - **What** are the data points?
    - Program information
    - Project information
    - Milestones
    - Volume / transactions
    - Duration, time it takes to complete XYZ
    - Errors, rework
    - Issue resolution
    - Risks
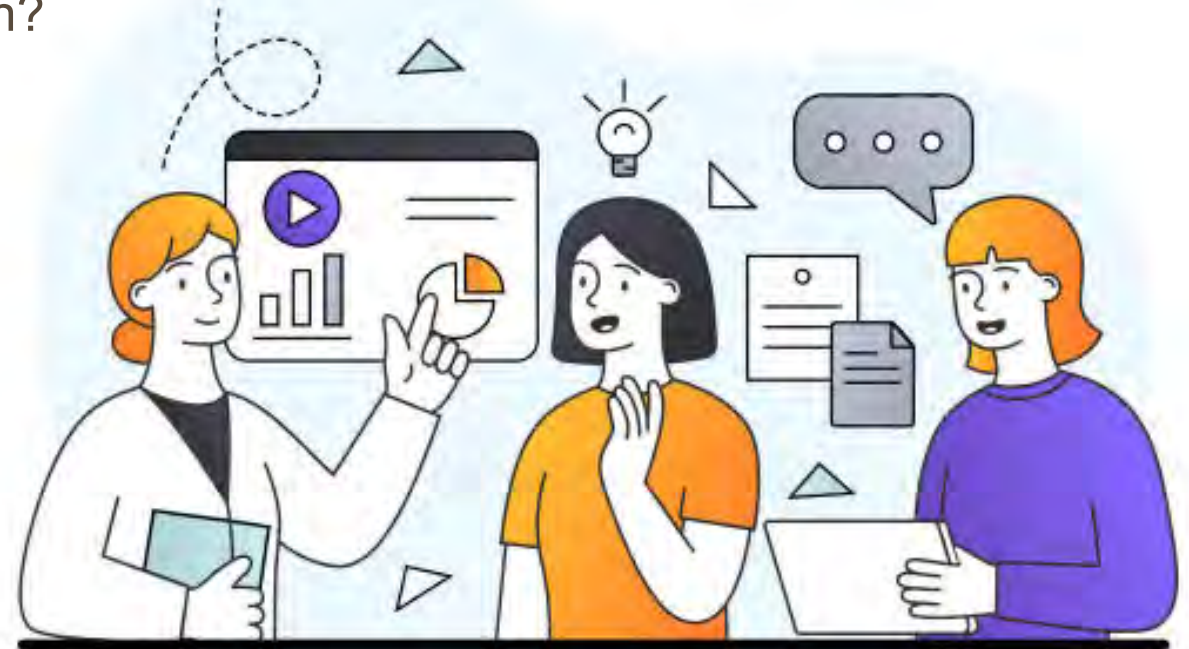
METHODS FOR DISCERNMENT – KNOW YOUR AUDIENCE

- Who, what, where, and why
  - **Where** can this information be found?
    - Publicly via CHOP Intranet
    - Sharepoint / MS Teams
    - Within a tool, application, or system
    - Smartsheet
    - Report out (ppt, email, spreadsheet)
  - **Why** is this data important?
    - Drives process improvement
    - Supports decision making
    - Identifies risks, issues, errors
    - Operational transparency
    - Indicates need (staff, oversight, support)

REVISE, REVIEW, SIMPLIFY

- Do all data points bring value?
- Is everything being tracked useful?
- Who will analyze the data?
- Where do gaps exist?
- Is there a better way to track, report, or measure?

QUESTIONS OR CONSIDERATIONS

- For more clinical and translational research data sharing
  - What data can be shared/Open access data
  - Is there a way to share novel data and still be in compliance with research regulations
  - What is the goal/value for presenting this information for the lab and the organization
  - Dashboards may be good to initiate collaborations within and across different institutions

GENERAL DO'S & DON'TS

DO

- Ask yourself, who is the audience?

- Look for reporting/dashboard examples that align with your vision

- Start small

- Periodically review

- Cut the waste

- Tell your story
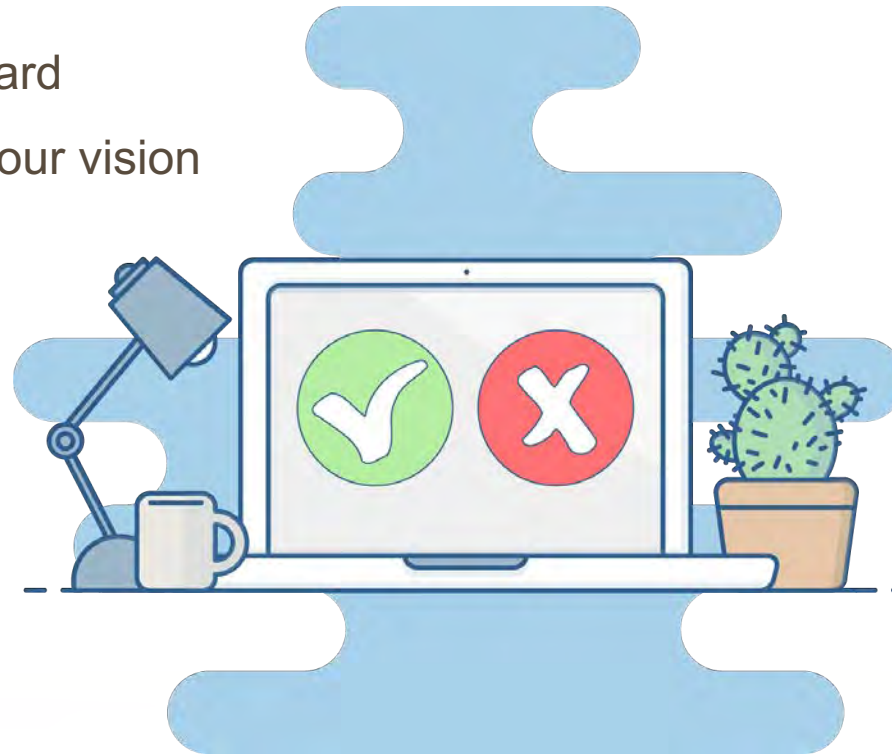
DON'T

- Be in a hurry

- Go it alone

- Try to track everything
  - Collect data "just because"

- Ignore feedback (process or data)

- Lose sight of your goals

- Assume your needs won't change

DISCUSSION

What other DO's & DON'Ts come to mind?

Drop comments in the chat

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FINAL QUESTIONS?

DON'T FORGET TO COMPLETE YOUR <u>SURVEY</u>

Reference #

WHO TO CALL

- Research Project Management Office (Research Admin)
  - Program and Project Management
  - Process Improvements, RFPs, System Implementations
  - Audit and Governance
  - DL email: DL-ResearchPMO@chop.edu
- Strategy Integration (Enterprise)
  - Business Process Improvement
  - Business Consulting
  - Program and Project Management
  - https://at.chop.edu/sites/administration/strategy
    - Submit an intake for review
- Center for Healthcare Quality & Analytics (CHQA)
  - Clinical Process Improvement
  - Data & Analytics
  - https://at.chop.edu/chqa

ADDITIONAL RESOURCES

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- Take a class at CHOP:
  - Project Management
  - Applying Improvement Methods (AIM)
  - Leading Improvement Course (LIC)
  - MS Office
  - DISC I & II with your team
  - CLI: Presenting with Impact: Presentations Skills Workshop
  - Virtual Meeting Technology Coaching Session

- Strategy Integration Department
  - https://at.chop.edu/sites/administration/strategy
  - Business Process Improvement

- Continuous Improvement Class (recommendation from PMO) – CHQA Team
  - https://at.chop.edu/chqa/Pages/Home.aspx
  - Clinical Process Improvement

- Data Literacy Team
  - Information:
    - https://at.chop.edu/communities/datagovernancecmte/quick-links/data-literacy
    - Open Office Hours: Every Friday from 10:00am-11:00am
  - Workshop and Micosession Flyers
    - https://at.chop.edu/communities/datagovernancecmte/PublishingImages/Data%20Driven%20Micro-Sessions%20Flyer_FY23.pdf
    - https://at.chop.edu/communities/datagovernancecmte/PublishingImages/Nucleus%20Workshop%20Flyer.pdf

- ServiceNow Service Portal - https://chop.service-now.com/esp

- QlikSense - https://at.chop.edu/communities/datagovernancecmte/quick-links/data-literacy/qlik-sense-consumer-guide

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ADDITIONAL TOOLS

ADDITIONAL TOOLS

- Collaboration Tools:
  - Microsoft Teams
  - Spreadsheets
  - Slides
  - Video Conferences
  - 1:1 chats Emails
  - Visio
  - Microsoft PowerPoint

- Cloud-based Tools:
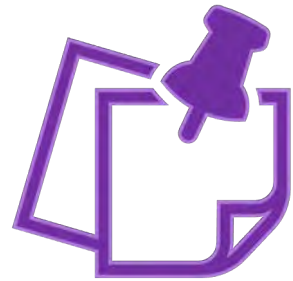 - ServiceNow
  - Smartsheet*
  - QlikSense

KEY TERMS & DEFINITIONS

KEY PROJECT TERMINOLOGY

- Project Charter: A formal document that authorizes the project team to execute project activities and provides the project manager with the ability to apply organizational resources to project activities

- Project Scope: The work performed to deliver a product, service, or result with the specified features and functions. The term "project scope" is sometimes viewed as including the product scope

- Business requirements: The describe the higher-level needs of the organization as a whole, such as the business issues or opportunities, and reasons why a project has been undertaken

- Project: A temporary endeavor with a definitive beginning and end

- Risk: The probability of occurrence of a specific event that affects the pursuit of objectives

- Project Dashboard: Is the summary of the project status

- Key Performance Indicator (KPI): Represent a set of measures focusing on those aspects of organizational performance that are the most critical for the current and future success of the organization

- Project Sponsor: the person or group that provides the financial resources, in cash or kind, for the project. When a project is first conceived, the sponsor champions the project.

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REFERENCES

REFERENCE LIST

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- Image: https://research.rowan.edu/officeofresearch/compliance/

- https://www.pmi.org/

- Image: https://thenounproject.com/