Paths to Knowledge

A journey towards effective and efficient creation, capture, sharing, and use of organizational knowledge to support evidence-informed decision making

2014 NHLC/CNLS 2014 Conference
Raising the Bar: A Critical Time for Bold Leadership
Presenters

Barbara Brady Fryer – Senior Provincial Director (Acting), Knowledge Management
Mark Moland, Director, Knowledge Management Practices
Carol Connolly, Director, Knowledge Resource Service
Daniela Robu, Knowledge Management Infrastructure
Ramona Trump, Director Clinical Project Support Services
Once upon a time.... in a province far, far away...
Knowledge management is a set of principles, tools and practices that enable people to create knowledge, and to share, translate and apply what they know to create value and improve effectiveness.

(World Health Organization, 2009)
Paths of Engagement
Guiding Principles
Our Journey
Reflection

• Take a minute at your table to think about the knowledge required to make effective decisions.
Integrating our Expertise

Knowledge Management Practices

Knowledge Resource Service

Knowledge Management Infrastructure

Clinical Project Support Services
Knowledge Management Practices - People to People
What is a Community of Practice?

A process of learning that occurs when a group of people with a common interest or problem come together regularly to share ideas, find solutions and build innovation.
Why CoPs?

The biggest information repository in most organizations sits in the heads of the people who work there, and the largest communication network is the web of conversations that binds them.

### How are CoPs Different?

<table>
<thead>
<tr>
<th></th>
<th>CoPs</th>
<th>Work Groups/Committees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td>Create, share and exchange knowledge; develop individual and organizational capacity</td>
<td>Accomplish a specified task</td>
</tr>
<tr>
<td><strong>Who belongs</strong></td>
<td>Self-selection; flexible</td>
<td>Assigned</td>
</tr>
<tr>
<td><strong>What holds them together</strong></td>
<td>Gains in professional and personal growth; identity; interdependency</td>
<td>Specific goals and milestones</td>
</tr>
<tr>
<td><strong>How long does it last</strong></td>
<td>As long as there is relevance, reciprocity and interest in learning together</td>
<td>Finite - when project is completed; outcomes achieved</td>
</tr>
</tbody>
</table>
Moving from One-Way Communication
Levels of participation

a common picture

- outsiders
- lurkers
- peripheral
- occasional
- active
- core group
- leaders
- coordinator
- support
- beginners
- sponsors
- transactional
- clients
Why now?

- We need to be more **intentional** and **systematic** about exchanging knowledge to improving practice.

- **Interprofessional collaboration** is vital - we work in very complex systems that requires a diverse group of people to work together to resolve issues and challenges.

- It is the **relationships** between people that makes the workplace more satisfying, less stressful and more productive.
Outcomes of Successful CoPs

- Relationships
- Safe, Reflective Environment
- Practical Experience
- Problem Solving/Innovation
- Learning
Tools for you and your Team

- Sponsor Readiness Conversation Guide
- Team Readiness Conversation Guide
Key Messages

• The people in your organization are a valuable knowledge resource.

• CoPs are an effective and efficient method to create a system that facilitates the transfer and application of experiential knowledge to improve business outcomes.
Knowledge Resource Service - People to Information
January 2011
Knowledge Resource Service
Optimization Business Plan

Equity of access

Seamless, efficient operations

Enable lifelong learning

Value added services

Support evidence informed decision & policy making

Support evidence informed patient care
• 50 library staff & KM Consultants

• 18 physical sites

• Serving all of AHS ~ 104,000 employees
  (May 2014, AHS)
KRS Optimized Services & Resources

- Re-alignment of staffing
- Consolidation of virtual evidence resources
- Communication and promotion of services
- Comprehensive evaluation
- Creation of centralized website for user-friendly access
Welcome AHS and Covenant Health staff to the new Knowledge Resource Service website!

Popular Resources:
- MEDLINE (via Ovid)
- Nursing Reference Center
- CINAHL
- EMBASE
- e-CPS
- Micromedex
- Lexicomp
- ACP Smart Medicine & AHFS DI Essentials
- STAT!Ref
- Techstreet Subscriptions
- PsycINFO
- PubMed

Popular Guides:
- Drug Information by Kathryn Ranjit
- Research Data
- Request an Appointment
- About Us by Kathryn Ranjit
- Addictions & Injury Prevention
- Renew Items by Kathryn Ranjit

Latest News:
NEW! Nursing Reference Center Now Available
Get clinical evidence and reference information online.

Receive Email Updates:
Receive email alerts whenever guides of interest to you are published.
Register for Email Alerts

Chat with Us

KRS.albertahealthservices.ca
Looking for the evidence?

Access KRS team expertise to complete literature searches and support your evidence-informed decision making.

Submit your literature search at http://krs.albertahealthservices.ca or visit or call one of our KRS locations.
The KRS website is your gateway to thousands of e-journals and e-books.
Your single-point of access to evidence-rich databases and e-resources.
Evaluation Framework

- **Appropriateness**: Health services are relevant to user needs and are based on accepted or evidence-based practice.
- **Accessibility**: Health services are obtained in the most suitable setting in a reasonable time and distance.
- **Acceptability**: Health services are respectful and responsive to user needs, preferences and expectations.
- **Effectiveness**: Health services are provided based on scientific knowledge to achieve desired outcomes.
- **Safety**: Mitigate risks to avoid unintended or harmful results.
Evaluation Framework

Structure

Process

Outcomes

structural indicators

key performance indicators

Coordinated access to resources & services

Service delivery quality

Capacity and capability for evidence informed decision making
Your colleagues use KRS services.
How can we help you?

In the last two quarters of 2013/14, KRS has supported AHS staff healthcare providers by:

• Completing over 1,300 literature searches
• Filling over 9,000 document delivery requests
• Answering over 7,500 reference questions
• Enabling AHS staff as a whole to search healthcare databases and e-resources over 350,000 times
This enhancement from the KRS group is a great knowledge platform for clinicians and researchers alike. Many thanks for coordinating and developing this idea!

-Strategic Clinical Network member on KRS Website Subject Guides

Great service! I will definitely use KRS again.

-AHS Clinician after using the KRS Website

Seriously...this is REALLY GOOD!!!!

-AHS Medical Oncologist on KRS Website Subject Guides

...this is the first time I have EVER used a chat forum; I found the medium, and our conversation, to be very user-friendly, quick, and informative. I will most definitely be accessing this format in the future.

-AHS Clinician on the live Chat functionality in the KRS Website

Your KRS website looks great!

-client from Horizon Health Network

Client feedback

http://krs.albertahealthservices.ca
What Next?
Key Messages

• Rapid changes within the information world requires new services and tools to support clinician’s need for “just in time” information

• An enterprise wide library service within Knowledge Management is supporting evidence-informed decision making and quality patient care
Knowledge Management Infrastructure
Knowledge Management Infrastructure

Path to Knowledge

Knowledge Trends
- Data, Information, Knowledge
- Access to Knowledge
- Knowledge and Business Value

Knowledge Management System
- Content
- People
- Process
- Technology

Performance
- Evaluation framework
- Return of Investment
Gartner predicts that enterprise data will grow by 800 percent in five years, with 80 percent of it unstructured.

Sources: IDC, “The Digital Universe” 2010
In a recent Coveo survey of 120 executives, only 13 percent said employees can effectively tap into the collective knowledge of their organizations.
Knowledge Management System

AHS - Knowledge Management System (KMS)

KMS Organizational Structure

- People
  - Users
  - Business Stewards
- Process
  - Standards
  - Best Practices
- Technology
  - Functions
  - Infrastructure
- Content
  - Knowledge Assets
- Record Management
- Knowledge Cycle

Lessons Learned, Best Practice, Reference Library, Clinical Knowledge Summaries

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Knowledge Management System

AHS Knowledge Management System

Content
- Record Management
  - Creation
  - Receipt
  - Use
  - Maintenance
  - Disposition
- Knowledge Cycle
  - Creation
  - Storage
  - Use
  - Reuse
  - Maintenance
  - Dissemination

Technology
- Functions
  - Collaboration
  - Document Management
  - Decision Making
  - Learning
  - Gamification
- Infrastructure
  - CoP, KM Tools and Practices
  - Taxonomy
  - Metadata
  - Version
  - Workflow
  - Audit
  - Archival
  - Retention
  - Navigation

Process
- Standards
  - KM Mission
  - KM Vision
  - Governance
- Best Practices
  - Content management processes
  - Content harvesting model
  - Quality standards
  - Evaluation business impact

People
- Users
  - Key Drivers
  - Knowledge Sharing
  - Content Owners
  - Business Stewards
  - Users
  - Engagement, Community harvesting
  - Reports
  - Scorecards

Lessons Learned, Best Practice, Reference Library, Clinical Knowledge Summaries

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### Knowledge Management System

<table>
<thead>
<tr>
<th>Effective Decision Making</th>
<th>Information Architecture</th>
<th>Knowledge Base</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Lessons Learned Repository</strong> linked to Alberta Health Services initiatives and projects</td>
<td><strong>1. Alberta Health Services organizational Content classification</strong></td>
<td><strong>1. Establishing Knowledge as an Asset in the organization (clinical and corporate)</strong></td>
</tr>
<tr>
<td><strong>2. Quality Toolbox</strong> developed to capture all the tools, methods, methodologies used to respond to multiple business needs</td>
<td><strong>2. File Naming Conventions to support findability</strong></td>
<td><strong>2. Processes and methodologies to create Knowledge Assets Toolkit</strong></td>
</tr>
<tr>
<td> </td>
<td><strong>3. Context-based navigation</strong></td>
<td> </td>
</tr>
<tr>
<td> </td>
<td><strong>4. Visual Identity</strong></td>
<td> </td>
</tr>
<tr>
<td> </td>
<td><strong>5. Site templates</strong></td>
<td> </td>
</tr>
</tbody>
</table>
Knowledge Management System linked to Performance – measure the impact of knowledge on business goals → Health Quality Matrix : Accessibility, Efficiency, Effectiveness)
Clinical Project Support Services
The **Project Management Institute** definition:

“A **project** is a temporary endeavor undertaken to create a unique product, service, or result. The temporary nature of projects indicates that a project has a definite beginning and end. The end is reached when the project’s objectives have been achieved”

PMBOK, 5th Edition, Chapter 1, Section 1.2, p3 (What is a Project?)
Clinical Project Support Services

Project Management Services (direct support)
- Project Status Reporting
- Professional Development of Project Managers
- Resource Management

Project Management Learning & Education

Consultative Services (indirect support)

Project Management Templates & Tools

Clients
Project Owners
Project Teams
Direct Project Management

Project Managers:

- Organize, structure and document project;
  - Foundational tools = project charter, project workplan/schedule
- Manage project scope, schedule, budget (& resources)
- Monitor, communicate and address project risks & issues
- Communicate with key stakeholders & project sponsors
- Facilitate project discussions, keep meetings on track
- Produce monthly project status reports
CPSS Leadership:

- Assess and monitor project progress and challenges from the project management perspective to determine learning needs of:
  - Project Managers
  - Project teams
- Develop just in time learning for PMs and others as required
- Develop stand alone education modules for in person delivery or electronic access by individuals
Clinical Project Support Services Leadership Team provides:

- **Consultation for existing and potential clients**
  - Maintain relationships with clients to understand context and needs
  - Describe project management support to enable shared understanding
  - Discussion at time of request for PM resource to jointly determine specific project needs & PM FTE required

- **Consultation for project owners/sponsors**
  - Share successful approaches from other projects
  - Identify other leaders who can share learnings from similar projects

- **Consultation for project teams**
  - Guide non-PMs in the use of use PM tools
  - Respond to requests for templates, provide advice on project approaches and recommend experienced resources/contacts
Clinical Projects
At a Glance

1. Engage project stakeholders
   - Clinicians & Subject matter experts
   - Patients & Community groups
   - Frontline staff (including implementation sites)
   - Support resources

2. Develop patient journey map

3. Document current state
   - Current process map
   - Clinical activity descriptions
   - Existing performance measures
   - Draft evaluation framework

4. Gather evidence to describe ideal state
   - Literature
   - Leading practices
   - Expert opinion
   - Patient perspective
   - Baseline data

5. Identify & prioritize gaps

6. Define new clinical content
   - Future process map
   - Clinical activity descriptions
   - Future performance measures
   - Finalized evaluation framework

7. Adapt clinical content for daily use in patient care
   - Physician orders
   - Assessment forms
   - Checklists
   - Education materials
   - Referral system
   - Evaluation tools

8. Pilot/implement

9. Evaluate performance (process & outcomes)

10. Determine next steps re: provincial rollout

Each step of the project builds upon previous steps, and provides the foundation for those ahead.

Prepared by: Clinical Project Support Services  (2013Dec09)
Knowledge Management; Research, Innovation and Analytics

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Value for organizations

- PMOs: in existence for ~ 30 years; many versions exist

- Value has been studied and described
  - (Alberta-based Example):

- Success =
  - Customization to fit the organization’s needs
  - Alignment with strategic and operational goals
CPSS: Our evolution within AHS

2011
- Inconsistent approach to projects
- Inconsistent PM skills
- No project charters, no project status reporting
- Project teams working in silos; learnings not shared

2014
- Consistent project management rigor & expertise applied to projects
- Standardized templates and processes
- Manage requests for support; assign PMs to projects
- Monthly project status reporting
- Project lessons learned repository
- Project management skill building
- Consultative support for project groups
- Client recognition of the value of project management

Future
- Education modules and inservices widely available
- Organizational level reporting on all clinical projects and programs
- Support for organizational prioritization of clinical projects
- Right mix of standardization vs flexibility
- Value & outcome metrics measured and reported
Frequently Requested Tools & Learning

• **Examples** of tools often requested:
  
  o Mini charter template
  
  o Project Status Report template

  - PM expertise required to apply these tools effectively
  - CPSS supports non PMs to use templates by providing learning to individuals and groups; widely accessible e-learning modules are in development
<table>
<thead>
<tr>
<th>Business Area</th>
<th>Project Sponsors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td>Business/Executive Sponsor</td>
</tr>
<tr>
<td>Working Group</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Working Group Leads</td>
<td>Project Documents location</td>
</tr>
<tr>
<td></td>
<td>(Identify where project documents are housed)</td>
</tr>
</tbody>
</table>

**Background**

*(Situation leading up to project initiation)*

**Business and Health Needs / Justification for the Project**

*(Describe the rationale for the project as a whole, and the business and/or health needs that the project addresses. Needs are specific states related to the described problem/situation)*

**Objectives**

*(The overall objective or goal of the project)*
## Project Status Report for: [Insert project name here]

<table>
<thead>
<tr>
<th>Name of Business Area:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Sponsor(s):</td>
<td></td>
</tr>
<tr>
<td>Project Co-Chair(s):</td>
<td></td>
</tr>
<tr>
<td>Project Manager:</td>
<td></td>
</tr>
</tbody>
</table>

### Project Summary

**Project Objective:**

- **Start date:**
- **End date:**

### Project Dashboard

<table>
<thead>
<tr>
<th></th>
<th>Status</th>
<th>Comments on dashboard: [All dashboard features with amber/red status require a brief explanation here]</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Last report period</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Current report period</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Overall</td>
<td>Green</td>
<td>Green</td>
</tr>
<tr>
<td>Schedule</td>
<td>Green</td>
<td>Green</td>
</tr>
<tr>
<td>Scope</td>
<td>Green</td>
<td>Green</td>
</tr>
<tr>
<td>Budget</td>
<td>Green</td>
<td>Green</td>
</tr>
</tbody>
</table>
Key Messages

- **Consistency** in project management results in:
  - Increased project success
  - Credibility
  - Managed Expectations
  - Shared learning; project teams not working in silos
  - Value-add for the organization from project reporting

- **Standardization with flexibility**: meets changing organizational needs

- **Multiple approaches to** project support:
  - Applied successfully in many project management environments
  - Builds individual capability & organizational capacity when resources are limited, which = sustainability
Our Mission

To provide a patient-focused, quality health system that is accessible and sustainable for all Albertans.
“A little knowledge that acts is worth infinitely more than much knowledge that is idle.”

- Kahlil Gibran
For more information

Please email us at:

KM@albertahealthservices.ca
Recommended CoP Resources

