

# SHIFT LAB

## PHASE THREE: CHANGE MANAGEMENT

# Your coaches



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**Welcome back to the Shift Lab!**

Today, we'll dig deeper into your **team dynamics**, talk about how to **test new ideas**, and introduce you to a tool to help you **plan out your next move**.

**But first... what have you tested?**

# Colorado BoS Fremont County

**Change Idea:** Understanding landlords apprehensions around renting to higher needs clients will help us to better support landlords.

**Prediction:** Improved relationships with landlords

# Madison/Dane County CoC

**Change Idea:** Resuming Outreach meetings will help increase coordination

**Prediction:** This will take time and we need housing providers, or a space for this, too

# Fairfax County CoC

**Change Idea:** Introducing bi-weekly case management meetings for those experiencing chronic homelessness

**Prediction:** Decrease how long participants remain homeless, and increase number of placements into housing

# Anyone else?

**Change Idea:** Tell us what you tested

**Prediction:** Tell us what you thought it would accomplish

**Learning:** Tell us what you learned

**Let's slow it down**

# We've covered a lot so far

**It's been a heavy few weeks for new content.**

We want to be responsive to what we heard from you all, so we're going to take our call today to continue to lean into some of the topics we introduced last month.

Now that we've walked through some tools to shape the work, we want to get a little more clear on how these tools relate to your local strategy.

# Improvement Team

# Improvement Team Dimensions

## Composition

Do we have the people we need on the improvement team to be successful in reaching our aim?

## Culture

Do our ways of working together, decision-making and shared commitments foster an environment where we can make progress towards our aim?

## Behaviors

What shared habits and practices do we need to adopt as an improvement team to systematically make progress towards our aims?

# Get clear on team roles

## IMPROVEMENT TEAM ROSTER

Improvement Team Lead

Data Lead

Senior Leader/Sponsor

Private/Public Funding Lead

Key Improver

Key Improver

Key Improver

Key Improver

 These will be the individuals needed to reach your aim

# Improvement Team Lead

Visible leader actively driving the system improvement work to reach big goals.

## Job Roles:

- Equip team members and delegate responsibilities.
- Recruit stakeholders
- Communicate to sponsors/senior leaders.

## Skills Needed:

The person in this role should have skills for facilitation, building consensus around shared goals, and motivating a team to execute changes.

# Data Lead

**Builds and maintains a measurement system to drive progress towards goals.**

## **Job Roles:**

- Maintain the data infrastructure that produces data
- Work directly with HMIS, or closely with an HMIS Administrator, to pull data
- Submit a monthly report, which populates the Performance Management Tracker

## **Skills Needed:**

The person in this role should support the improvement team with data collection needed to measure the results of changes and provide report-outs as needed for the team and leadership.

# Senior Leader/Sponsor

Leader(s) accountable for ongoing participation and engagement in Built for Zero.

## Job Roles:

- Clear the path for systems-level problem solving
- Help reset goals, agree on priorities, and line up supports

## Skills Needed:

The person in this role should have formal authority in relationship to local systems touching homelessness.

# Additional Lead Roles

## Private/Public Funding Lead

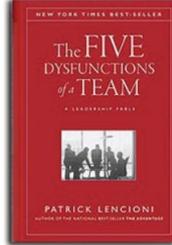
Leader responsible for understanding local funding landscape and directing strategies to better leverage funding.

## Emergency Response Lead

Liaison between Built for Zero and local crisis-response or emergency work, e.g. COVID-19 outbreak.

**Critical Mindset:** Improvement Starts with Me

# 5 Dysfunctions of a Team



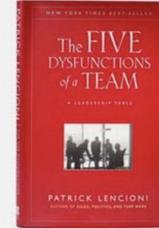
## The Five Dysfunctions of a Team



**Want to go deeper?**

Read *The Five Dysfunctions of a Team*

[BUY NOW](#)



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# Improvement Team Functioning

## 5 Dysfunctions of a Team\*

1. **Absence of Trust:** The fear of being vulnerable with team members prevents the building of trust
2. **Fear of Conflict:** The desire to preserve artificial harmony stifles the occurrence of productive, ideological conflict
3. **Lack of Commitment:** The lack of clarity or buy-in prevents team members from making decisions they will stick to
4. **Avoidance of Accountability:** The need to avoid interpersonal discomfort prevents team members from holding one another accountable for their behaviors and performance
5. **Inattention to Results:** The pursuit of individual goals and personal status erodes the focus on collective success.

## Key Team Behaviors for Improvement

1. **Meetings begin with stating your shared aim** and reviewing recent data to understand progress
2. Meetings include review of the improvement work underway with an emphasis **on learning**
3. **Commitments, big and small are written down** and shared with the group. The team holds itself accountable.
4. **Data is continuously utilized** to provoke and direct changes to strategy and improvement work
5. Two-way communication is happening between front line workers and the leadership with **a focus on problem-solving**

\*Lencioni, *The Five Dysfunctions of a Team*

**What's one thing we're doing well?**  
**What's one thing we need to urgently improve?**

# Change Ideas and Tests

# Change Ideas and Tests

## **Change Idea:** A concrete change to an existing process

- ★ Ideal for existing processes or infrastructure versus ones that are being built or developed for the first time
- ★ Process mapping is an important tool to support this process
- ★ Some changes take some lead up time to develop -- take time to be clear about the amount of effort that will be required

## **Test of Change/PDSA Cycle:** Trying a change idea in a real-world scenario

- ★ Start small -- small enough you could test it by Tuesday!
- ★ The goal of any test should be *to learn*.
- ★ Learning from tests should drive the next actions you take as a team

# Activity ≠ Change Idea

## **NOT a change:**

- Planning
- Having a meeting
- Educating staff
- Creating a protocol
- Assigning responsibility

## **YES, a change:**

- Use a new form
- Run a “by name” review meeting
- Use the form on the next 10 cases
- New outreach process

Each change idea should come with an explicit prediction of how it will impact the outcome.

# A Change versus a Test of Change

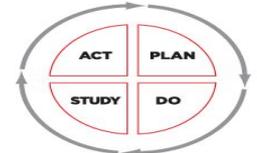
- Change: free breakfast at drop-in tutoring



Type of food



Amount of food



Getting the word out



When food is served

# Test versus a Task

<b>Test</b>	<b>Task</b>
Using a new form with one client	Getting input from outreach staff on what should be included in the form
Running a case conferencing meeting with a new format	Creating and sending an agenda reflecting new format
Beginning housing location processes at initial intake with two veterans	Meeting with intake workers to develop plan and coordination
<b><i>What else?</i></b>	<b><i>What else?</i></b>

# Improvement Team Functioning

## Key Behaviors and Processes for Improvement

1. Every meeting begins with restating the shared aim and embeds data to evaluate progress towards that aim

2. Meetings include review of the change ideas your community is currently testing, results of the last test(s) and the next test(s) being run.

3. Commitments, big and small, towards your shared aim are directly asked for, written down and leadership holds each other accountable. Period.

4. Continual data analysis is done to understand where you should focus improvement efforts.

5. Two-way communication is happening between front line workers and the leadership team(s) to identify barriers and system problems that need to be solved in order to reach the shared aim

## Dysfunctions to Avoid\*

1. **Absence of Trust:** do team members feel comfortable acknowledging mistakes and weaknesses? Are people willing to ask for help?

2. **Fear of Conflict:** are team members willing to engage in open disagreement for the purpose of getting to the best thinking possible?

3. **Lack of Commitment:** do team members feel clear about the direction you're heading together? Do you have fully commitment and buy-in on this direction, even when there's disagreement?

4. **Avoidance of Accountability:** do team members feel comfortable holding each other accountable to their commitments?

5. **Inattention to Results:** are team members committed to collective results of the group? Or are they only focused on their respective program-level goals?

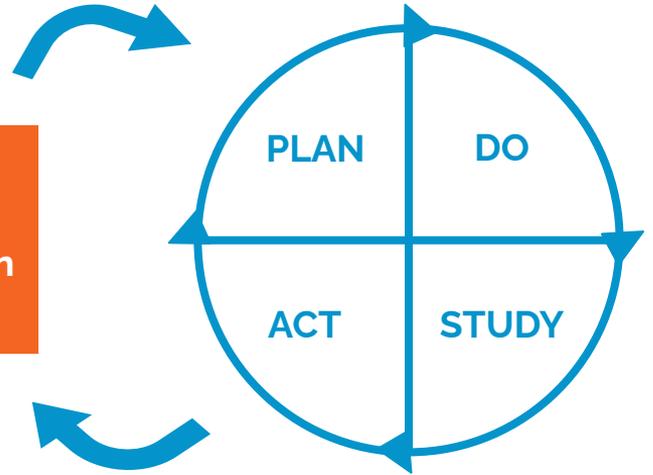
# Restructuring the PDSA process

# The Model for Improvement

What are we trying to accomplish?

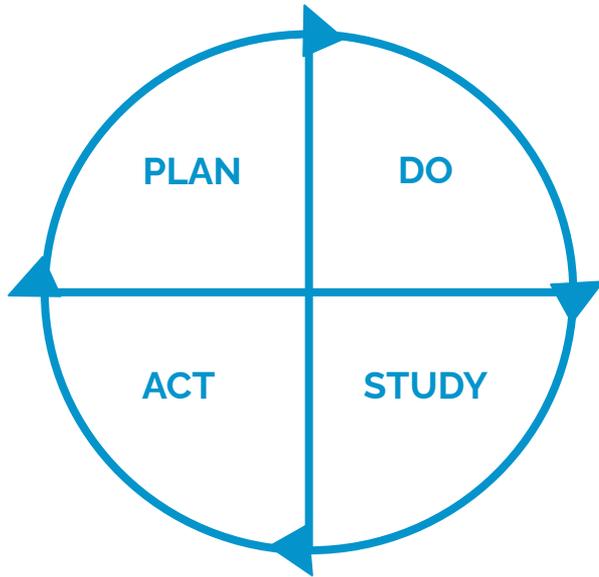
How will we know a change is an improvement?

What change can we make that will result in improvement?



The Model for Improvement was developed by **Associates in Process Improvement** and taught to us by the **Institute for Healthcare Improvement**. Thank you!

# Reminder: what's in a PDSA



## PLAN

→ What's the test?

## DO

→ What did you try?

## STUDY

→ How did it go?

## ACT

→ What's next?

# Taking the “P” out of “PDSA”

We want to take one extra step to make this easier: **take the “planning” out of the PDSA cycle.**

Use the **Test Log** to map out what you can do, and then reflect on, and then respond to before the end of the month.

**Let's plan our work for the month**

# Breakouts

We'll break you out by your community to plan out your changes for the remainder of the month.

1. Make a copy of the document we dropped in the chat,
2. Pick a few tests,
3. Update the status for those test you chose, and
4. Add the month you plan to do the test

# Here are your breakout room assignments

1. Clark County CoC
2. Colorado BoS Fremont County
3. Colorado BoS Mesa County
4. Colorado BoS Pueblo County
5. Cook County CoC
6. Eugene, Springfield/Lane County CoC
7. Fairfax County CoC
8. Fayetteville/Northwest Arkansas CoC
9. Fresno/Madera County CoC
10. Kansas BoS Douglas County
11. Madison/Dane County CoC
12. Marin County CoC
13. McHenry County CoC
14. Pikes Peak CoC
15. Santa Fe City
16. Spokane City and County CoC (Veteran)
17. Tallahassee/Leon County CoC
18. Tucson/Pima County CoC
19. Virginia BoS - Petersburg
20. Virginia BoS - Valley Homeless Connection
21. West Palm Beach/Palm Beach County CoC
22. Western Virginia CoC

**Next up**

# Small groups

Our small groups will focus on process mapping.

We'll email out further instructions, but you'll be in a group with 2 other teams.

In those small groups, we'll walk through a mapping exercise together to track the user journey from the point of identification, to their move into housing.

# To-do before our next call

- ❑ Submit data for June (email [bfzdatasupport@community.solutions](mailto:bfzdatasupport@community.solutions) for help)
- ❑ Register for your small group call (info in follow-up email)
- ❑ Move forward on the next steps you planned out in your **Test Log**

Reach out if we can help you move forward on any of this:

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