Infinite Possibilities

A Guide for Scaling an Innovation Across VHA

Discover	Test	Replicate	Scale
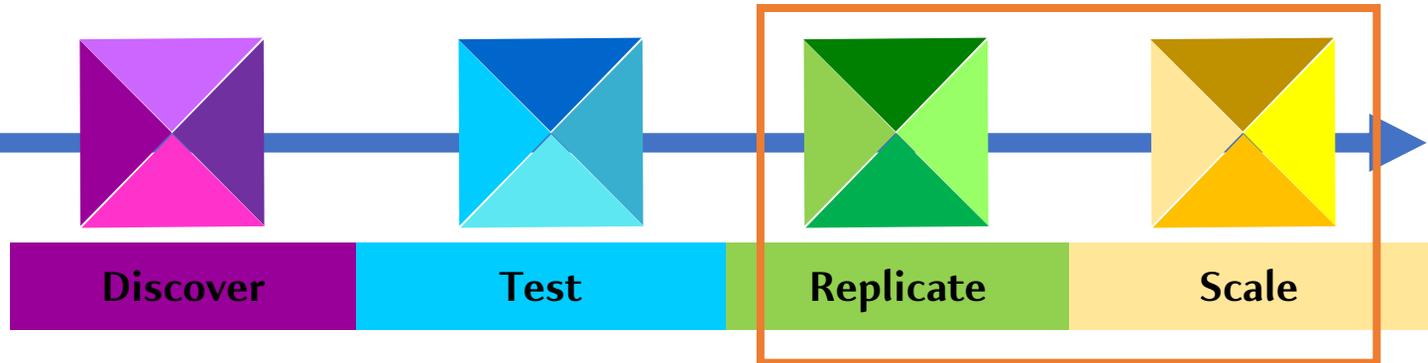
Welcome to the Replicate and Scale Phases of Innovation!

At this point in your innovation process, you identified a problem– perhaps one affecting a Veteran, caregiver, clinician, administrator, staff member- and from your robust understanding of that customer's needs, developed a solution to help solve the problem! GREAT WORK!

Now it's time to move forward with Replication and Scaling! To do so, you should have completed the following steps:

Defined a problem   Developed a solution   Piloted the solution   Identified positive outcomes
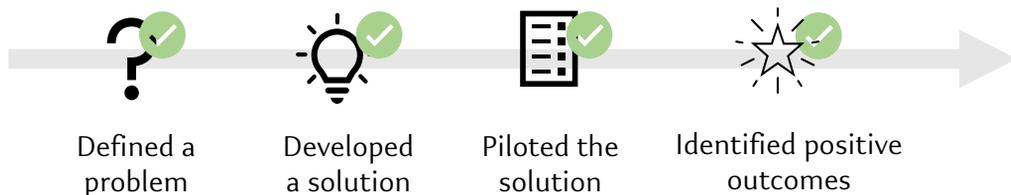
This guide will walk you through developing a scaling strategy for your innovation through the following steps:

Step 1: Identify a scaling type

Step 2: Select an implementation approach

Step 3: Develop a scaling plan

Step 4: Execute your scaling plan

Field-driven projects are transforming VHA care and operations across the country!

Daniel Abrahamson and G. Eli Kaufman pioneered the Mobile Prosthetic and Orthotic Care (MoPOC), from Seattle VA. MoPOC brings state of the art, accessible prosthetic and orthotic (P&O) services to VA Community Based Outpatient Clinics (CBOCs) and Veterans' homes. MoPOC is now scaling nationally through Office of Rural Health enterprise-wide initiative funding and will reach 6 additional sites in the next two years!

Dr. Shannon Munro developed HAPPEN - Hospital-Acquired Pneumonia Prevention by Engaging Nurses –an oral care initiative to prevent non-ventilator associated hospital acquired pneumonia (NV-HAP). What began at Salem VA has spread across the entire nation. Growth in HAPPEN led to the creation of the National Organization for NV-HAP Prevention (NOHAP) to develop a national research agenda and policies to combat NV-HAP.

The Light Electronic Action Network (LEAF), an open-source web application to digitize day-to-day processes, was first developed at DC VAMC by an intern! LEAF has now been adopted at 252 sites across the country and has over 3,000 staff users. Over time, staff have found more uses for LEAF; in 2018, LEAF was leveraged during the Harvey and Irma hurricanes to provide virtual care. LEAF has now been transitioned to the IT Franchise Fund!

The Veterans Rideshare Program was created to support homeless Veterans by helping them get to health appointments, job interviews and find housing opportunities. Rideshare began at the Boston VA, and after security additional funding from congressional expended authority, the initiative is now live at over 60 sites. Veterans Rideshare is also being further adopted for Community Work Therapy (CWT) and same-day mental health appointments.

Why is scaling innovation important to VHA?

VHA is the largest integrated health system in the United States, serving over 9 million veterans across almost 1,300 facilities. In dedication to the VA's mission **to "fulfill President Lincoln's promise 'to care for him who shall have borne the battle,'"** it is critical to leverage the might of the VA system to provide the best care for our Veterans by **expansively spreading** best practices and innovations.

Why we want to "pull" innovation

We recognize that directives and mandates from leadership can feel disconnected from the needs of those on the frontlines working directly with our Veterans.

When working to scale innovation, we want to provide the best care and experience for our Veterans and staff, and we want to spread exciting and transformative innovations to as many sites as possible. We also know it is challenging to adopt new processes, technologies, or systems, especially if they haven't been appropriately designed with the user's input.

That's why we **want innovation to be a "pull" system** versus a "push." We use human-centered design to **create customer-centric innovations** that meet the needs of those who the innovation impacts. **We scale innovation by exciting potential adopters to inquire about, engage with, and adopt solutions!**

What is our ultimate scaling goal?

As your innovation gains wide-scale interest and demonstrates positive outcomes and impact, we expect that relevant offices and departments will take an interest in adopting and advancing the initiative according to its mission. Ultimately scaling your innovation requires engaging future business owners. In this way, we ensure that the innovation and impact outlives our initial project development and management.

Engaging Program Offices early, often, and as collaboratively as possible is critical to the success of your innovation!

4 key principles to successful scaling

(1) Be customer focused.

Continually ask yourself the question: "How can I better support my customers and better meet their needs?" Understanding their needs will guide you in identifying how to communicate with them and what kinds of resources and support they need for easier implementation and adoption.

(2) Leverage the power of communities

Communities have incredible power to accelerate and catalyze tremendous advancement and growth of an innovation. Communities support exchange of knowledge, provide additional support resources, and excite customers about the innovation. There are many ways to build community around your innovation, including creating mentorship networks or matching like-sites, scaling in phases so sites go through the process together, hosting conferences or building a Community of Practice (CoP) around the innovation.

(3) Build a leadership stakeholder coalition

Building a committee or coalition, made up of a group of committed organizational leaders, is critical to overcoming the natural challenges and aversions to adopting innovation in a health care arena. Innovation requires a team approach and success requires deliberate coalition building. It is critical to methodically educate and activate key stakeholders to enable long-term success and sustainment.

(4) Measure your impact

Health care understandably places a heavy emphasis on evidence, and successful diffusion requires a data-driven approach. Measuring your impact serves as the linchpin to your ability to be successful in other areas, such as obtaining resources. Most importantly, the patients we serve deserve this laser focus on outcomes and results. There are two types of metrics you need to be tracking: (1) Outcomes and impact of the project and (2) Engagement and scaling reach.

Diffusion of **EXCELLENCE**
Diffusing Promising Practices Across VHA

Step 1: Identify the appropriate scaling type

The first step in developing a scaling strategy is identifying the appropriate scaling type. There are **two different types of scaling**:

|	
Scaling by Replication: adoption of the innovation at additional facilities, locations, departments, etc.	**Scaling by Use Case Variation:** adaptation of the innovation in alternative practice areas or for alternative uses
Hospital-Acquired Pneumonia Prevention by Engaging Nurses (HAPPEN) – began in the Salem VA Community Living Center and scaled by replication through adoption to every VA hospital in the nation.	Virtual reality (VR) in VA began at Asheville VA to address post-operative pain management. Through scaling by use case variation, VR has now been used in pre-surgical planning, as a tool for treatment of post-traumatic stress, in medical training, and many other use cases.

Note: When scaling by use case variation, you should also be intentional to drive replication of each use case.

Step 2: Select an implementation approach

Diffusion of Excellence, one of Innovation Ecosystem's portfolios that scales high-impact health care practices across VHA, identifies **4 implementation approaches** that you can consider when scaling your innovation. To prepare your scaling strategy, you should select one or multiple of these approaches.

Diffusion of EXCELLENCE
Diffusing Best Practices Across VHA

Organic Implementation

No concentrated adoption directive, 100% opt-in

Phased Implementation

Implement with different cohorts of adopters

Big Bang Implementation

Implement all at once on a national scale

Hybrid Implementation

Combination of these different approaches

Step 2: Select an implementation approach

Organic Implementation

Organic adoption and growth

Makes Sense When:
- The project is in high demand,
- There is little-to-no resources to support growth
- The knowledge base for implementation is well-packaged

Post your innovation and necessary resources on the Diffusion Marketplace as a first step and support others' implementation as demand and interest grows.

LEAF grew very organically – both in use case variation, as well as across through replication. The most important part about LEAF's success was it was created to be easily accessible and adaptable for everyone! Thus, anyone interested could adopt the solution and make it fit their needs.

Phased Implementation

Implement with different cohorts of adopters

Makes Sense When:
- Awareness and demand are still maturing
- Fewer resources are readily available
- Product or knowledge is still in development or being refined

Identify several sites with significant interest and commitment to go through a first-round implementation together, helping you work out any kinks with the process!

HAPPEN utilized the phased scaling approach by first replicating unit by unit at the Salem VA Medical Center then spreading across VISN 6. In the following phases, sites who volunteered were guided through the implementation process in small groups. This allowed for sites in similar implementation stages to support each other.

Diffusion of **EXCELLENCE**
Diffusing Promising Practices Across VHA

Step 2: Select an implementation approach

Big Bang Implementation

Implement all at once on a national scale

Makes Sense When:
- You have strong senior-level VA support, and the project is a leadership imperative,
- The solution is lightweight to implement,
- You have a lot of resources (funding or FTE)
- There is a sense of urgency

Identify a national office with high interest and urgency for wide-scale implementation.

Boston VA initiated an AED Cabinet Naloxone Program. Over nine-months, the initiative was diffused and implemented at 150 sites. An aggressive implementation process included a DUSHOM memo, follow-up email from Dr. Stone, small group calls with facilities and VISNs, and regular communications with facility champions.

Hybrid Implementation

Utilize multiple implementation strategies according to what makes the most sense for sustaining impact

Makes Sense When:
- Awareness and demand are varied throughout the enterprise
- Leadership buy-in or priorities change

Start with a planned approach but be open to pivoting. Be Flexible!

PRIDE has scaled through both organic and phased implementation approaches. Facilities heard about PRIDE by word of mouth, would contact the Project Champion, and then scheduled training time and launch. Through word of mouth– with both Veterans and employees - PRIDE began a phased implementation method by simultaneously launching at multiple facilities. The first cohort launched in March 2021.

Diffusion of EXCELLENCE
Diffusing Promising Practices Across VHA

What is the right implementation approach for you?

Your implementation approach will determine the process to introduce the innovation across our nationwide health care system. The right approach should create momentum but also feel manageable.

Best practices to consider as you develop your scaling strategy:

(1) Know your strengths and bandwidth. Seek support to complement your skills.

(2) Be Flexible! If you've started with one approach but see greater opportunity with another approach, pivot and adapt.

(3) Be mindful of VA as a whole leverage existing networks to support scaling

VACO
Program
Offices

How might we:

- diffuse an innovation across an entire service line or department?
- support a program office for national scaling?

VISN

- diffuse the innovation across a VISN?
- support individual sites together in the VISN?

VAMC

- replicate an innovation to multiple departments at a VAMC?
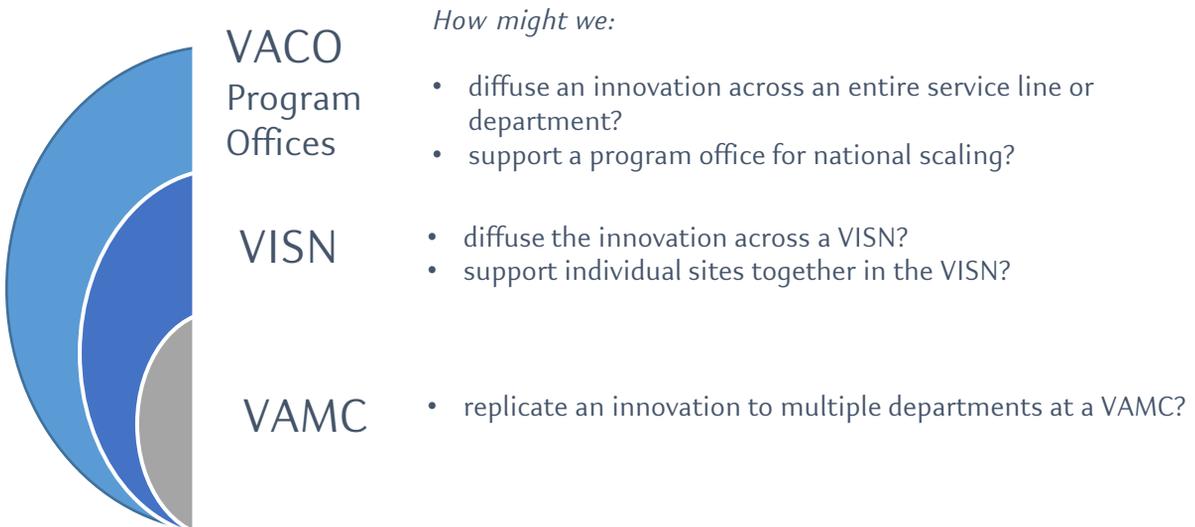
(4) Evaluate national leadership awareness and support

| Stakeholder Feedback Scale		
Strong: We would like to play an active role in diffusing this practice	**Moderate:** Please update us at regular intervals (e.g. quarterly) on the status of this practice	**Light:** Only make us aware of significant updates or milestones

What is the right implementation approach for you?

To select the appropriate implementation, consider the existing resources and strengths you and your project have and compare those with the requirements of each approach.

	Resources	Customer Demand	National Support	Packaging & Completion
Organic Implementation	Light	Moderate	Moderate	Full
Phased Implementation	Moderate	Moderate	Heavy	Moderate
Big Bang Implementation	Full	Light	Full	Full

Legend: Light · Moderate · Heavy · Full
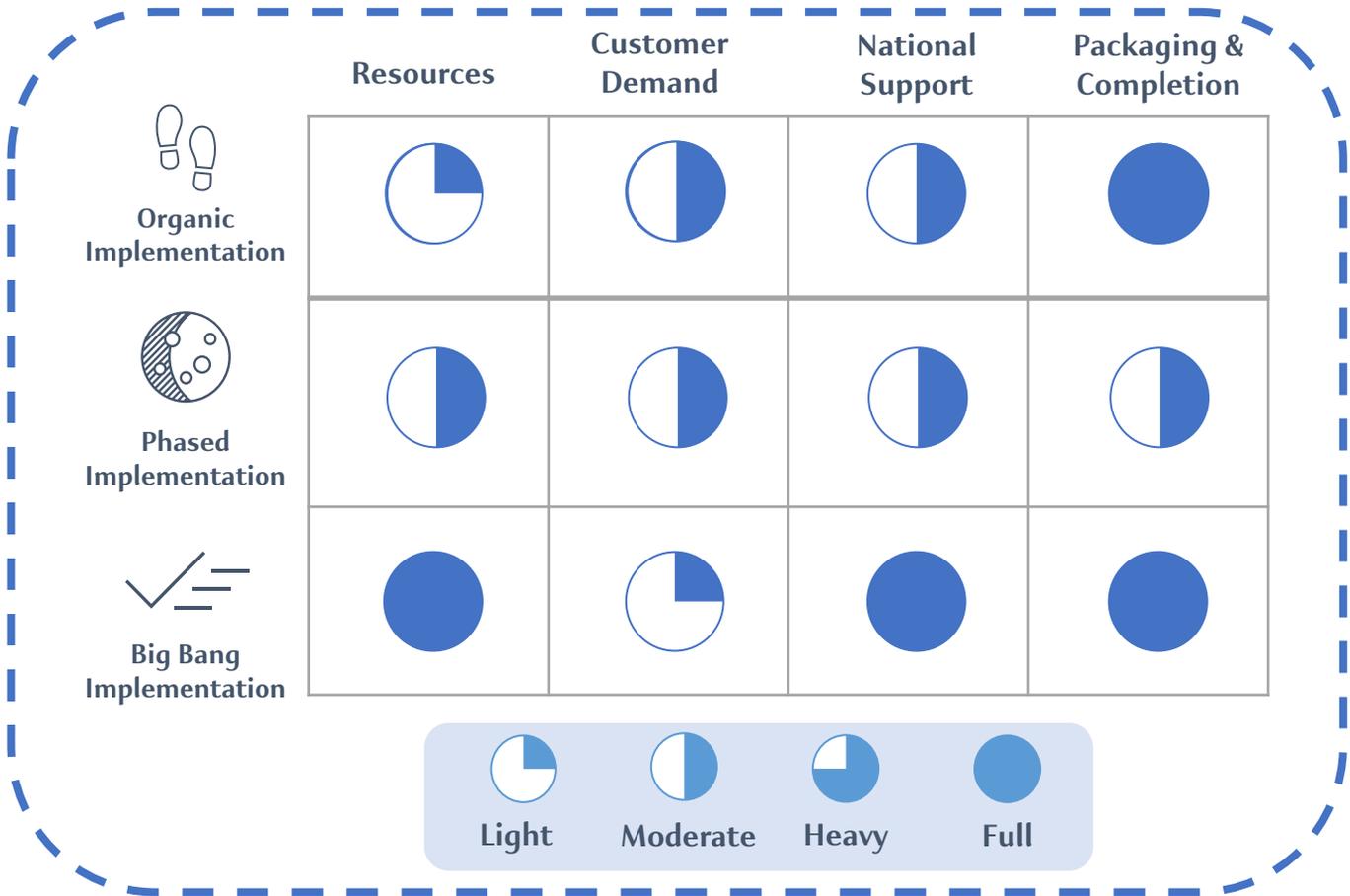
Then, build your strengths, weaknesses, opportunities, and threats (SWOT) Analysis to identify your best implementation approach.

EXAMPLE: Diffusion of Excellence Emerging Technology Team's Virtual Reality Initiatives

Strengths	Weaknesses	Opportunities	Threats
• Strong research and outcomes • Significant interest from sites across the country • Rapidly evolving technology, user-friendly, more affordable	• Relies on acquisition of technologies • Requires clinician and patient education • Challenging to connect to the VA network	• Growing list of alternative use cases • New market entrants for healthcare • Support from leadership	• COVID delays to project priority level • Limited available funding • Knowledge gap about the innovation leading to difficult stakeholder buy-in and resource approval

Based on this SWOT, a hybrid of organic and phased approaches makes up the VR scaling strategy.

Step 3: Build a Scaling Plan

Now that you have identified the appropriate scaling type and implementation approach for your innovation, it is time to build **your scaling plan**!

We recommend accomplishing the checklist below and then packaging the answers about your innovation and scaling efforts together into a scaling plan. The scaling plan needs to provide the details for implementation success and sustainment, to evaluate the risks and benefits of the project, and to articulate the future state as a result of the project.

To build your scaling plan, you must answer three main questions: **WHAT, WHO, HOW.**

Below are links to three in-depth instruction guides for each component to the checklist and a scaling plan template for your use. Scaling Plan template here.

WHAT
... is your innovation's value?

WHO
... are the innovation's customers?

HOW
... do you implement your scaling strategy?

Guide 1: Defining your innovation's value

Guide 2: Building an effective customer and stakeholder engagement strategy

Guide 3: Planning your scaling implementation

❑ Write a problem statement

❑ Define your value proposition

❑ Craft a vision statement

❑ Segment your customers

❑ Market and communicate with your customers and activators

❑ Provide support through community-building activities

❑ Build a stakeholder engagement strategy

❑ Identify necessary resources

❑ Define and track metrics

Diffusion of EXCELLENCE
Diffusing Promising Practices Across VHA

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Step 4: Execute your scaling plan

Once you've completed your checklist, you are ready to execute your scaling plan. All of the work you've done up until now will feed into the four core activities you will regularly accomplish to continually advancing your innovation:

- Communication & marketing to engage customers
- Implementation resources and community support to support customers through implementation
- Stakeholder engagement
- Collect and analyze data and report outcomes

- Create and manage a National Steering Committee
- Hold quarterly meetings to keep key stakeholders informed on progress and develop strategy for continued growth of the innovation

- Communicate your value proposition and vision effectively
- Continually engage one-on-one with potential adopters of the solution
- Leverage existing communication channels to publicize opportunity for adoption

Stakeholder Engagement

Communication and Marketing

Implementation Resources and Community Support

Collect and Analyze Data, Report Outcomes

- Create resources that support easy instruction for innovation adoption
- Direct customers to available resources
- Conduct necessary training and on-boarding instruction
- Facilitate community-building activities

- Communicate with implementing sites and collect data on implementation and project outcomes
- Synthesize data and report on project impact

Infinite Possibilities

Guide 1: Defining your innovation's value

1 WHAT
What is your innovation's value?

This guide is a supplemental deep-dive for innovators building their scaling strategy and plan for the innovation. This guide will provide instruction and examples for you to:

- **Write a problem statement**

- **Define your value proposition**

- **Craft a vision statement**

Your work in defining your innovation's value should be synthesized into your scaling plan. From the template provided, your answers from this guide would feed into slide 1 of your scaling plan.

Your Innovation

1 WHAT

Problem Statement

What is your customer's problem that you are helping to solve?

Value Proposition

How does your solution meet the customer need? What value does the innovation deliver to your customer?

TEMPLATE

Vision Statement

What impact do you hope to accomplish with my innovation?

Existing Outcomes to Date

What data do you have to demonstrate value or impact?

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1 WHAT — What is your innovation's value?

To effectively scale your innovation, you must have a compelling reason for others to adopt your solution. **Being able to articulate your innovation's value is the first step to scaling!**

To articulate your innovation's value, you must be able to:
(1) Define the problem statement
(2) Define your value proposition

> Your value proposition explains how your solution meets the customer's needs and solves the problem.

Your problem statement does not include any information about your solution. It should be very specific and answer these kinds of questions:
- What is the problem? Why is it a problem?
- Who is experiencing the problem? When and how often do they experience the problem?

When you define **your value proposition**, your project should be the solution to your problem.

5 Questions You Must Answer About Your Innovation To Define Your Value Proposition

What is the problem the innovation is working to solve?

What is the value you deliver to your customer?

How is your practice different than other services offered?

What is your promise to your customer?

What is the customer need that your solution addresses?

Example: HAPPEN

(1) Problem Statement: Patients who are hospitalized or receiving long-term care are at risk to acquire Non-Ventilator Hospital Acquired Pneumonia (NV-HAP). Hospital acquired pneumonia leads to significant health and cost implications for the patient and the health system.

(2) Value Proposition: HAPPEN engages nurses and an interdisciplinary team to regularly provide oral care assistance to patients, which reduces the bacteria in the mouth that contribute to pneumonia. The solution is cost-efficient (less than $3-5 per patient depending on product choice), has low-implementation barriers for staff adoption, and has been found to decrease NV-HAP by 40-60%.

1 WHAT How Use Case Variation Influences This Process

Being specific in your problem statement and value proposition is critical to guide your innovation's scaling effort.

However, when an innovation can be used in alternative settings or for different uses, **the problem statement and the value proposition are different for each use case!**

It is critical to define the problem statement and value proposition for **EACH** use case.

This is why, after defining your value proposition, you then create **an innovation vision!** Your innovation vision will serve as a unifying mission statement despite disparate use cases.

Virtual Reality Examples:

Use Case: Pain Management

(1) **Problem:** Traditional treatments for pain have relied on medications, in particular opioids, or analgesia interventions, often invasive such as nerve blocks and epidural injections, which have risks including increased hospital admissions, health care costs, and mortality. There is an urgent need for effective, noninvasive complementary modalities for the treatment of pain, both acute and chronic.

(2) **Value Proposition:** Virtual Reality Therapy provides a non-pharmacological option to aid in the management of pain and stress, as an alternative or adjunct option.

Virtual Reality Examples:

Use Case: Rehabilitation

(1) **Problem:** Therapists struggle to provide rehabilitation services in-person due to barriers such as the COVID-19 pandemic, patients' mobility, or patients' rural living locations. When completing assessments, standard of care includes inconsistent measurements with high variability between practitioners.

(2) **Value Proposition:** Virtual reality provides a virtual and immersive experience for patients that increases accessibility, decreases health care disparities, and allows the clinician to provide more accurate real-time assessments using a platform that is enjoyable for the patient.

1 WHAT What is your innovation's vision?

Create a bold vision that compels people to action!

Your innovation's vision statement will be your "north star," for you and those interested in your innovation. It serves to unify the work across the scope of the innovation and dares those involved to look beyond what's obvious.

While your value proposition may define the who, what and why of the solution, your vision statement should speak to the larger, long-term impact.

Creating a compelling vision that is shared by peers and stakeholders will support you in overcoming barriers. Being a champion for an innovation in the nation's largest integrated health system is hard work and you may deal with organizational, interpersonal, procedural, and technical challenges.

Dream Big

Imagine the Future

A Vision Should:

Focus on Success

Inspire Others

Question: What impact do I hope to accomplish with my innovation?

EXAMPLE VISION STATEMENTS FROM RECOGNIZABLE ORGANIZATIONS:

Teach for America: One day, all children in this nation will have the opportunity to attain an excellent education.

Microsoft (at its founding): A computer on every desk and in every home.

Tesla: To accelerate the world's transition to sustainable energy.

EXAMPLE VISION STATEMENTS FROM VHA INNOVATIONS:

PRIDE: For every LGBT Veteran to have access to a standardize group to facilitate social connectedness while reducing healthcare disparities, such as suicide risk.

LEAF (at its founding): To digitize all paper-based processes at the VA.

Sleep CRH: A world in which veterans sleep all night every night.

1 WHAT EXAMPLE: Scaling Plan Slide 1

PRIDE in All Who Served

Problem Statement

LGBT Veterans are at an increased risk for suicide and other healthcare disparities, due in part to discrimination and barriers to accessing care. Despite provider-focused education and inclusive policies, a gap in clinical services for LGBT Veterans remained.

Value Proposition

The PRIDE in All Who Served program was developed to fill this critical care gap and to provide a resource for reducing healthcare disparities, including suicide risk. Session content focuses on overall wellness, increasing social connectedness, and empowering Veterans to engage in services related to their personal healthcare needs.

Vision Statement

For every LGBT Veteran to have access to a standardize group to facilitate social connectedness while reducing healthcare disparities, such as suicide risk.

Infinite Possibilities
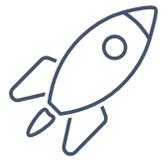
Guide 2: Building an effective customer and stakeholder engagement strategy

This guide is a supplemental deep-dive for innovators building their scaling strategy and business case for the innovation. This guide will provide instruction and examples for you to:

2 WHO
Who are the innovation's customers?

- **Segment and market to your customers and activators**

- **Provide support through community-building activities**

- **Build a stakeholder engagement strategy**

Your work to develop a customer and stakeholder engagement strategy should be synthesized into your scaling plan. From the template provided, your answers from this guide would feed into slide 3 of your scaling plan.

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2 WHO **Engage and Mobilize**

TEMPLATE

Customer Engagement Plan

Who is the customer? What other potential customers could this solution have?
How will you reach them?
How will you manage customer relationships?

Stakeholder Engagement Plan

Who are key stakeholders?
What is your stakeholder engagement plan?

VHA Stakeholders

VHA INNOVATION Ecosystem

2WHO Who is at the center of your innovation?

When asking **who** is at the center of your innovation, think **customers, activators,** and **stakeholders.**
- **Customers** are the people directly benefiting from the solution; the people receiving value from the innovation.
- **Activators** are the people that provide this value to the customers.
- **Stakeholders** are people who will not actively use or adopt the solution but whose perspective will impact the execution and success of the project.

In many ways, deliverers are a form of stakeholders, but how you work with them is different. Often the activators are linchpins for success, even though they are not the customers (e.g. the customers are the patients, and the activators are the clinicians).

Example: HAPPEN

| Value = Preventing Pneumonia | — Customers directly benefiting the value — | Customer = Patients |

Value delivered through the innovation → Through The Innovation = Oral Care → Activators = Nurses → Nurses are the delivery mechanism for patients receiving the innovation and thus the value → Customer = Patients

Stakeholders: Nurse Managers, Administrators, Local Leadership

Stakeholders: Dental, SLP,

Stakeholders: Logistics, DSS, Infection Control

Stakeholders provide support or critical resources to execution

It is important to highlight that the patient is not always the customer! For example, **LEAF, the Light Electronic Action Network,** was originally designed to digitize workflow transactions with a VA Medical Center, making VHA staff the customers.

Customers	Value Received
VHA staff submitting transactions for review	Staff received faster responses and had an easier workflow process for submit transactions
VHA staff reviewing transactions for approval	Staff had an easier and more efficient process to make decisions

2 WHO Knowing your customer and segmenting them based on their needs

Your innovation's value proposition directly answers how the solution meets the needs of your customers. Your previous discovery work should have helped you to understand your customers, their pain points, and needs. This insight will guide you as you will want to segment your customers into different groups based on their respective needs.

When you are scaling your innovation, your goal is to increase customer adoption.

To scale by replication: your goal is to identify customers at other sites like the customer segment that you successfully piloted and support facilitating their adoption.

To scale by use case variation: your goal is to identify alternative customer segments or use cases that may benefit from your innovation, and support facilitating their adoption.

It is important to note that even within a single use case, you may likely have multiple segmentations, with their own respective needs. Thus, you will need to tailor the innovation accordingly!

For example, in using Virtual Reality for pain management:

Elderly patients who are less tech savvy; Patients with multiple illnesses; Patients with different pain types and sources will each have their own unique needs.

Thus, even where VR is being used for the specific problem of pain management, it is still critical to meet the needs of each customer segment!

The best approach to segmenting customers is to identify similarities in needs.

To guide your analysis, here are a few examples of types of segmentations you could do:
- **Demographic** (Age, Gender, Ethnicity, Level of education, etc.)
- **Medical Condition or Unit** (Low/Medium/High Complexity, ICU/ER/Oncology, etc.)
- **Geographic** (Rural/Suburban/Urban, Regional, VISN, etc.)
- **Generational/War Era** (Vietnam, Afghanistan)
- **Relationship with VA** (regular/low engagement)
- **Skills or Capabilities** (technology, language)
- **Independence** (need of caregiver, mobility, etc.)
- **Profession** (Clinical, Operational, Administrative, Leadership, etc.)

2 WHO | Building effective customer relationships

After segmenting your customer and activator bases, you can answer the critical question of **"What relationship does each customer and deliverer segment expect you to establish and maintain?"**

It is critical to answer this question for the activators as well, as they are often the linchpin for successful customer adoption. For example, nurses are the activators of oral care for HAPPEN and the activators of VR pain management therapy; it is important to understand their needs to support adoption and implementation.

Types of Relationships and Resources			
Hands-on and/or personal assistance	**Self-service**	**Community-based**	**Co-create or customizable**
Check-in calls, Mentors	Implementation toolkit	Community of Practice, Conferences	Templates

Note: some relationships are more resource-intensive than others!

The value of facility champions

Most successful projects identify a "facility champion," who is responsible for overseeing project implementation at the local facility. The facility champions actively promote the value of the innovation and engage staff members across the organization about it. It is recommended to identify a staff member in a managerial role, but close enough to the project.

A project should never proceed at a site without having appropriately leadership buy-in – at the department level (i.e. a nurse manager) and facility level (i.e. CMO, VAMC Director, etc.)!

Each innovation needs to decide the best way to hold a site accountable to successful implementation of the project and tracking and communicating the data and outcomes of the project to you.

One way to hold sites accountable to implementing the initiative is to sign an Implementation Memorandum of Understanding (MOU) with the site. This is not always the right approach and should be carefully considered.

An MOU can be appropriate if the site is responsible for dedicating specific resources.

2 WHO Creating a community for your customers or activators

Communities support exchange of knowledge, provide additional support resources, and excite customers about the innovation, catalyzing further adoption and scaling.

Innovation is difficult within our large VHA system. Contracting, funding, time pressures, are just a few of the large barriers for staff to overcome when working to innovate or adopt new innovations. Communities are one mitigation effort to help overcome these challenges!

There are many ways to build community around your innovation, including but not limited to creating mentorship networks or matching like-sites, scaling in phases so sites go through the process together, hosting conferences or building a community of practice around the innovation. It is most important that you identify the needs of your customers and activators and design your community-building activities around those needs.

Learn more about building a community of practice to support advancing your innovation here.

Example Communities in Action

Since 2018, LEAF has held an annual conference for interested staff to strengthen their LEAF skills, collaborate with peers, and vision the future of the platform!

HAPPEN advanced across the country in phases. Hospitals at similar stages of implementation were grouped (3-8 hospitals) to support each other on regular calls. HAPPEN also hosts a monthly Community of Practice call in which the community bounces ideas and celebrates successes together.

LEAF Coaches serve as community leaders who collaborate regularly to advance the platform and serve as mentors for the rest of the community.

The XR Community of Practice meets monthly to exchange about best practices, learn from subject matter experts, and collaborate to pilot new use cases.

2 WHO How do you communicate with your customers or activators and let them know about your innovation?

One of the most important components to scaling your innovation is generating demand from your customers or activators, so that you have sites and staff interested and willing to adopt your solution. Within the large VHA Healthcare system, there are many avenues for you to get the word out about your innovation.

Some best practices include:
- Leverage existing networking platforms and calls such as Service Line, Community of Practice, or VAMC, VISN, or PAO calls
- Write a blog post
- Post on the diffusion marketplace
- Host an "open house call" for staff to learn about your innovation

Virtual Reality Vantage Point Blog Post

Some communication channels to consider include:

Word of Mouth	Presentations (scientific and general public)	Academic Publications	Blogs and Social Media	VHA Comms

About Diffusion Marketplace

The Diffusion Marketplace is designed to help organically spread important innovations throughout the VA health care system. You can post your innovation and key resources to share it with the innovation community. You can find the form here.

2 WHO | Who are stakeholders and why do they matter?

In contrast to customers, **stakeholders** will not actively use or adopt the solution, but are critical people whose perspective on the solution will impact the execution and success of the project.

Building a stakeholder coalition – a group of committed stakeholders – is one of the single most important efforts you must engage in as you work to scale your innovation. Health care delivery is a complex undertaking. Added to that is an inherent risk-aversion when new practices and interventions have the potential to impact the lives of patients. Overcoming these natural challenges requires a team approach and deliberate coalition building.

Example VHA Stakeholders

Program Offices

VISN/VAMC Leadership

Technologists

Subject Matter Experts

Answer these three questions about each stakeholder group to guide your engagement efforts:

What key resources do you need from this stakeholder?

What key activities does this stakeholder perform?

What value does your innovation offer this stakeholder?

Diffusion of Excellence Best Practice !

Create a **steering committee** made up of key stakeholders that can advise you and be empowered as a part of the innovation's growth process!

Just like customers, your stakeholders are divided into different segmentations based on their needs and the value you provide to each other. For example:
- If you're scaling a technology solution, different technologists such as OI&T, ISOs, clinical engineers, may need to be engaged to approve the innovation.
- Leadership across the VHA, at the local, regional, or national level, can serve as champions, subject matter experts, or mentors to support the growth and development of the innovation.
- Engagement with relevant program offices is critical, especially if they could eventually become future business owners of the innovation.

Diffusion of EXCELLENCE
Diffusing Promising Practices Across VHA

EXAMPLE: Extended Reality (XR) Network

2 WHO

VHA XR Network: Engage and Mobilize

Customer Engagement Plan

Scaling via use case variation and replication

Use Case: Pain Management
- Customer Segment 1: Post-Operative patients
- Customer Segment 2: Palliative care patients
- Activators: nurses, technicians, social workers

Use Case: Rehabilitation
- Customer Segment 1: Orthopedic patients
- Activators: nurses, physical therapists, occupational therapists

Use Case: Surgical Planning
- Customer Segment 1: Surgeons
- Stakeholders: Education

Community support through Community of Practice:
- Monthly calls
- Mentorship network
- MS Teams channel with documents, resources, and content communication

Comms plan:
- Blog Posts
- Presentations to facilities, departments, service lines, Program Offices, VISN leadership

Stakeholder Engagement Plan

Establishing VHA XR Network Advisory Committee for national governance

Stakeholders represented include: Program Office leadership, frontline staff, other government agencies

Quarterly meetings

Agenda topic examples:
- Current use cases
- Potential future use cases
- Policy
- Standard Operating Procedures
- Metrics

Infinite Possibilities

Guide 3: Planning your scaling implementation

3 HOW

How do I implement my scaling strategy?

This guide is a supplemental deep-dive for innovators building their scaling strategy and business case for the innovation. This guide will provide instruction and examples for you to:

- **Identify what resources you need**
- **Define and track metrics**

Your work to develop your execution plan should be synthesized into your scaling plan. From the template provided, your answers from this guide would feed into slide 3 and 4 of your business case.

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3 HOW

Implementation

TEMPLATE

Resource needs:
- **per adoption site**
- **scaling management**

- Space in a facility
- Equipment, Materials, maintenance
- SMEs, Interdisciplinary team
- IT, Project management, External contractors
- Hardware, Applications / software, Infrastructure / cloud solutions
- FTE salary
- Travel

What metrics will you track for project outcomes and implementation success?

Clinical
- Patients impacted

Financial
- Cost savings

Operational
- Workforce satisfaction

Reach
- Number of participants in Webinars or Community of Practice Calls

Adoption
- Number of site adoption

Implementation
- Percent of eligible patients who receive intervention

What resources do you need to provide a potential adopter?

Stay Touchpoint Implementation Toolkit

A Toolkit to Implement Stay Touchpoints Practice at Your Facility

The best resource to provide a potential adopter is an "implementation toolkit" that outlines the processes to operationalize the innovation, any resource requirements, templates for adaptation, and hyperlink to any other additional existing resources.

See existing Implementation toolkits: HAPPEN, Stay in VA, Flow3, STRIDE

What resources does a site need to run your project? What resources do you need to scale your innovation?

It is important to put together a sample comprehensive list and budget of the needs to successfully implement your program, so that potential customers have transparency into resource requirements and can easily adapt it for their project. This can be integrated into your "implementation toolkit."

It will be additionally valuable for you to create a similar overview and budget for your own efforts to scale the initiative.

Physical	Human	Intellectual	Technology	Financial
• Space in a facility • Equipment, Materials	• SMEs, Interdisciplinary team • Leadership • Project management • IT • External contractors	• Education or training • Data and publications	• Applications / software • Hardware • Infrastructure / cloud solutions	• Equipment and maintenance • FTE salary • Travel?

In many cases, you will need to **contract or create collaborators** with external parties (or refer customers to the appropriate vendor) to acquire the appropriate materials and resources for your initiative. Learn more about the process to contract or collaborate here.

3 HOW What resources exist to support implementing your project across VHA?

In order to scale your innovation, you'll need to be creative to identify resources to fund implementation. It is best to leverage a variety of sources from across the organization!

Local Funding

Implementing VAMCs can seek local resource inputs from:
- FTE: Resource Management Board
- Equipment: Office of Information and Technology (OI&T) or BioMed
- Space: Facilities Management

National Funding

National program offices can provide resources when the initiative has been deemed mission-critical and the office has discretionary FTE or funding resources.
- Particularly relevant for phased or national implementations

Specialized Appropriation

Congress often allocates funding to incentivize investment in certain areas of health care delivery or organizational development.
- Relevant when your innovation is consistent with the goal of the appropriation (e.g., Rural Health, Mental Health, etc.)
- Program offices are often the gatekeepers of the specialized appropriations and will open applications for utilizing the funding
- Funding usually has a finite time span (e.g., 3 years) and comes with reporting requirements to validate the desired impacts

Strategic Partnerships

If you are looking to collaborate with an external organization, the Office of Strategic Partnerships can support coordinating this.
- VA Secretary has "gift authority" from Congress in which companies and organizations can make donations to enable success of specific initiatives
- This can help "jumpstart" your efforts with operational momentum and publicity!

3 HOW What VHA departments can support me?

How the Innovation Ecosystem can support you

The Innovation Ecosystem's portfolios and staff can support you across your innovation lifecycle. Reach out to the Innovation Ecosystem to find a mentor for your innovation process. Find more resources to develop your innovation on the VHA IE Website.

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- Share your innovation on the **Diffusion Marketplace**
- Pitch your innovation at **Shark Tank**
- Brainstorm with a **Diffusion Specialist** about your scaling strategy

Diffusion of Excellence's Emerging Technology Team

- Identify **external collaborators** for your innovation
- Serve as **subject matter experts** or mentors for your innovation

VHA Innovators Network

- **Innovation Specialists** guide project development and scaling
- iNET can connect you with site staff for feedback or adoption of the innovation
- Fund small scale projects

How Quality Enhancement Research Initiative (QUERI) may provide valuable support

Center for Evaluation and Implementation Resources (CEIR)

- Measurement and spread plans, strategic partnerships
- Resources for self-education: program evaluation, implementation science

Health Economics Resource Center (HERC)

Economic impact of practice

Veterans Affairs Information Resource Center (VIReC)

VA datasets to use to assess practice impact

Evidence Synthesis Program (ESP)

Available clinical research related to practice

Partnered Evidence-Based Policy Resource Center (PEPReC)

Policy implications of practice; research design

3 HOW | Measure Your Impact

Health care understandably places a heavy emphasis on evidence, and successful diffusion requires a data-driven approach. Measuring your impact serves as the linchpin to your ability to be successful in other areas (e.g. acquiring stakeholders, obtaining resources, celebrating achievements). Most importantly, the patients we serve deserve this laser focus on outcomes and results. Thus, it is critical that you track key performance indicators to measure success.

There are two types of metrics you need to be tracking:
(1) Outcomes and impact of the project
(2) Engagement and scaling reach

Questions to help you determine which KPIs to track:

- What data elements currently exist?
- How can you create accurate measures or use surrogate measures?
- Do you plan to collect self-report or audit data? If yes, how will you do so?

Example Metrics

Project outcomes and impact

These metrics support you in demonstrating efficacy.

Clinical
- Patients impacted
- Incidence rate change

Financial
- Cost savings
- Revenue produced

Operational
- Workforce satisfaction
- Save time or non-financial resources
- Administrative burden

Engagement and Scaling Reach

These metrics support you in demonstrating interest.

Reach
- Number of participants in Webinars or Community of Practice Calls

Adoption
- Number of site adoption

Implementation
- Percent of eligible patients who receive intervention

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Diffusing Promising Practices Across VHA

3 HOW | EXAMPLE: HAPPEN

HAPPEN Implementation

Resource needs for adoption sites:

(1) Implementation toolkit
(2) Implementation resources:
    A. Staff education materials, including training videos and emails
    B. Patient education and promotional materials
(3) Necessary resources:
    A. Oral care supplies ($3-5/patient depending on product choice)
    B. Nurse time for training and implementation
    C. Physical space for storing supplies
    D. Interdisciplinary SME team involvement and support
    E. Adaptation of EHR for input of data

Key Implementation and Outcome Metrics

Clinical
- NV-HAP incidence rate

Financial
- Cost savings

Reach
- Number of participants in Community of Practice Calls
- Applicants to phased implementation

Adoption
- # of adoption sites

Implementation
- Percent of patients who receive intervention

4 Slide Scaling Plan Template

Your Innovation

1 WHAT

Problem Statement

What is your customer's problem that you are helping to solve?

Value Proposition

How does your solution meet the customer need? What value does the innovation deliver to your customer?

Vision Statement

What impact do you hope to accomplish with my innovation?

Existing Outcomes to Date

What data do you have to demonstrate value or impact?

TEMPLATE

---

2 WHO Engage and Mobilize

TEMPLATE

Customer Engagement Plan

Who is the customer? What other potential customers could this solution have?
How will you reach them?
How will you manage customer relationships?

Stakeholder Engagement Plan

Who are key stakeholders?
What is your stakeholder engagement plan?

VHA Stakeholders

4 Slide Scaling Plan Template

3 HOW — Implementation

Resource needs:
- **per adoption site**
- **scaling management**

- Space in a facility
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- Hardware, Applications / software, Infrastructure / cloud solutions
- FTE salary
- Travel

What metrics will you track for project outcomes and implementation success?

Clinical
- Patients impacted

Financial
- Cost savings

Operational
- Workforce satisfaction

Reach
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Adoption
- Number of site adoption

Implementation
- Percent of eligible patients who receive intervention

TEMPLATE

3 HOW — Execution Plan

Scaling Strategy

Scaling Type:
- Replication? Use Case Variation?

Scaling Strategy:
- Phased adoption? Organic adoption?

Scaling Timelines? Goals?

What will you do to scale the innovation?

- Stakeholder Engagement
- Communication and Marketing
- Implementation Resources and Community Support
- Collect and Analyze Data, Report Outcomes

TEMPLATE

Infinite Possibilities

A Guide for Building Innovation Communities

This document is meant to serve as an introduction to innovation communities of practice and how these communities can support efforts to scale and advance the innovation.

This guide will provide an innovator who is considering building a Community of Practice (CoP) insight on:

- whether a Community of Practice is the right fit for the innovation
- key components to operating and sustaining a CoP
- how to build a CoP

What is a Community of Practice?

According to the Scaled Agile Framework, "communities of practice (CoPs) are organized groups of people who have a common interest in a specific technical or business domain. They collaborate regularly to share information, improve their skills, and actively work on advancing the general knowledge of the domain."[1]

What are the objectives of a Community of Practice?

By sharing resources and creating a platform for exchange and support, Communities of Practice advance the innovation and facilitate greater project adoption.

1 Replicate an innovation at new sites and for new use cases

2 Build community around an innovation

3 Advance the study, knowledge, and practice of an innovation

[1] Scaled Agile Framework: https://www.scaledagileframework.com/communities-of-practice/

How do Communities of Practice scale innovation?

Connect care providers and staff interested in utilizing a common innovation

Provide a platform to distribute existing resources and opportunities

Facilitate learning and expertise-building

Establish communication and collaboration amongst members

Organize members to progress the initiative

Pioneer new practices and knowledge to advance the innovation

Is building a community of practice right for my goals or my innovation?

CoPs exist across many industries and can be beneficial in numerous circumstances. For a CoP to provide value to its members, it should have these characteristics:

A CoP should be working with innovations **with a level of complexity that benefit from shared learning.** Many service lines in healthcare fall into this category, and as a result, some specialties have _existing_ CoPs that can be leveraged for innovation. Before you consider creating a CoP, identify if a CoP is necessary or if any related CoPs already exist.

CoPs are managed in a truly egalitarian fashion, in which each member is empowered to experiment and share and access knowledge, opinions, data, and resources.

A CoP should be creative and agile. A CoP must strike a balance between being mission-driven and expansively visionary. New solutions and use cases of a solution should be welcomed to a CoP.

How does a Community of Practice meet its objectives?

To accomplish a CoP's primary objectives, CoPs establish both a <u>structure for collaboration</u> and a <u>home for resources</u> around the innovation.

Structure for Collaboration

Community of Practice Calls

At the VHA, a best practice has been to create a Community of Practice call, according to a regular cadence, for the community to meet, learn from a subject matter expert, discuss progress, collaborate to overcome challenges, and share new opportunities. The cadence for these CoP calls varies – can be weekly or monthly for example. The CoP for XR, Stay in VA, and HAPPEN is monthly.
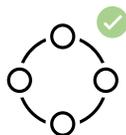
Work Groups

Small work groups that can focus on specific use cases or specific goals can both better engage participants, as well as advance the mission of the community. A work group could focus on publishing findings of a study, exploring the best vendor for VHA, or exploring a new application for the innovation.

Mentorship Network

Mentorship structures are fantastic ways to engage and empower members, support the replication of projects, and encourage collaboration. By matching experienced innovators or community members with new participants, the experienced innovators can support new participants, share best practices, and troubleshoot together through a process.

The Community of Practice should be a home for frequent communication and collaboration across the community. Using a technology platform, like Microsoft Teams, is helpful to allow members to set up channels for discussion and communicate in a designated space about the innovation.

Home for Resources

At the VHA, a best practice has been to create a SharePoint or a Teams Group where important files and resources can be found, referenced, and built upon.

Example Resources for a CoP to Provide:

- Implementation Plan Guide
- Spreadsheet of existing sites, points of contact, and any relevant details about the project
- CPRS templates for documentation
- List of current or potential external collaborators
- Example CRADAs, SOWs, or other contracting documents
- Existing data or reports about outcomes, particularly for leadership
- Articles or research relevant to the innovation

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Who belongs to a Community of Practice?

Communities of Practice are a relatively informal group. People opt-in based on their interest and participate as it is providing value to them. Communities of Practice ultimately have two segmentations to be mindful of: **community contributors** and **community champions.**
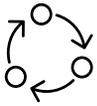
Community contributors: Communities of Practice provide information and support to current and potential community contributors - the people that will directly implement and/or use the solution and are interested in being involved to progress the community to meet its goals.

Community champions: Communities of Practice also provide valuable resources for community champions. These individuals may be leadership (at the local, VISN, or PO level) interested in understanding how an innovation overall is progressing or interested in bringing a project to their department/region. These individuals may also be technologists who may need to learn about or monitor the technology application. In these circumstances, these community champions may not serve as community members or contributors, but the CoP may need to engage with them on an ad-hoc or even regular basis.

Use three guiding principles when engaging with your community stakeholders:

Provide regular high-level updates about the CoP to Community Champions. Engaging them early and often will facilitate long-term success.

Build relationships and solicit feedback from the community

By building relationships with individuals, you can get to know his/her skills, interests, and expertise. This will support your efforts to engage and empower him/her in the community.

Engage Community Champions

Tailor activities to the community's needs and interests

Survey the interests of community contributors and solicit feedback on ideas for the community's goals and activities.

How do you establish, grow, and sustain your community?

BUILD
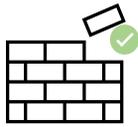
Understand community needs and establish Community goals, leadership, and activities

Best practices for establishing a CoP:
- Engage potential community contributors to understand their needs through surveys, focus groups, interviews, informal conversations
- Establish a governance team for CoP management
- Define the goals of the community and create a mission statement that reflect these goals
- Prototype services, activities and resources and solicit feedback from potential community contributors

GROW

Market to potential community contributors about the existence and the benefits of the CoP.

Best practices for marketing the CoP:
- Be specific in the goals of the CoP and the value the CoP will deliver
- Be action-oriented and have a clear direction for how to be involved
- Utilize a variety of communications channels including online, print, and interpersonal. For example, publish a blog post, participate in a VAMC or PAO call, or develop and distribute a one pager.

SUSTAIN

Communicate with existing community contributors, continually engaging them and providing value to them.

Best practices for CoP communication:
- Provide consistent communications to members
- Be action-oriented and create calls to action
- Shoutout or publicize successes within the community
- Provide forums for member exchange
- Ensure that diverse voices are represented
- Set communication guidelines and values

Track Community Activities

As you leverage the power of a community to scale your innovation, it is important to track and collect information about the innovation's scaling reach, and about outcomes and performance.

Some example metrics you can establish for tracking CoP engagement include:
- Members and "Active" Members – on Teams, the platform tracks members who have participated in the last 90 days
- CoP call participants, and repeat call participants
- Papers published
- Use cases piloted
- Mentorship pairs active

Where should I start?

Use these questions to jumpstart your process to build a community of practice!

Customer
- Who will this community serve?
- What executive leadership and program offices should know about this community?
- Does my innovation have uses beyond its current application?

Mission and Goals
- What is the purpose of this community?
- What does the community want to achieve?
- What are the customers' needs?

Activities
- What types of activities will lead the community to accomplish its goals?
- What types of activities will generate excitement and engagement from the community?
- How can the community empower members to take initiative?
- What can the community work towards together?
- How often will activities occur?

Communication
- How can we get the word out about this community? How can brand the community according to the customers' needs?
- How and how often will we communicate within the community?

Resources
- What platform or resources can the community provide to facilitate collaboration?
- What resources already exist relating to this innovation that can be helpful for others?
- What resources do not exist that the community can develop together?

Community
- What is the CoP's governance structure? What is a leader's responsibilities?
- What does it mean to be a community member? Are there any requirements to be a member? Are there any member responsibilities?