

Implementing the Planetree Model in the Clinic Environment: The Aurora Medical Group Experience



- healing environment
- patient education
- empowerment
- complementary therapies
- patient-centered care



Acknowledgements

This manual was written based on the work and experiences of Aurora Medical Group as it begins to implement the Planetree philosophy and model of care in its clinics throughout Eastern Wisconsin. Aurora Health Care, the parent organization of Aurora Medical Group, began its Planetree journey in 2001 with the opening of Aurora BayCare Medical Center in Green Bay, Wisconsin. The visionaries behind Aurora's Planetree journey are Donald J. Nestor, Executive Vice President and Chief Financial Officer, and Rebecca Flink, RN, Vice President of Facilities Design and Construction. Mr. Nestor is Aurora's Planetree Organizational Leader Champion and, along with Rebecca, have led, encouraged and inspired the implementation of the Planetree philosophy and model of care throughout the Aurora system. They have kept us pointed toward "magnetic north" as we continue this exciting Planetree journey in our hospitals and clinics.

Aurora Medical Group one of the first clinic organizations among the Planetree affiliates to formally implement the Planetree philosophy and model of care. We would have been unable to plan for or even begin this journey without the support and encouragement of Aurora Medical Group's leadership, Eliot Huxley, MD, President, and Jim Brannon, Vice President of Operations and Chief Operating Officer.

An organizational culture change (and the Planetree journey is a wonderful culture change) takes vision, enthusiasm, courage, a lot of perseverance and some well-placed humor. Aurora's employee and organizational development staff provide all of this to us and then some. Thank you to our shining star, Wendy Peche, Director of Employee and Organizational Development and Aurora's Planetree Coordinator.

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Aurora Health Care is a not-for-profit Wisconsin health care provider and a nationally recognized leader in efforts to improve the quality of health care. Aurora has care sites in more than 80 communities throughout eastern Wisconsin.



PLANETREE

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Introduction

The Planetree philosophy and model of personalizing, humanizing and demystifying health care is one that aligns naturally with the medical group environment. Whether initiating or transforming this philosophy and model of care into the medical group culture, the journey is the same. It is a journey that never ends and one that takes a medical group down many exciting and rewarding paths. The journey, therefore, is the theme of this implementation manual for medical groups.

This manual was written assuming the following premise about your medical group:

Leadership already has adopted this philosophy and model of care and wants the medical group to move forward.

Sections 6 and 19 of this manual provide a panorama of information and history on Planetree.

As you begin your Planetree journey, this manual will provide you with suggested maps, itineraries, directions, refueling stops and a little bit of sight seeing. You are about to embark on a remarkable adventure. Enjoy!



PLANETREE



Why Does the Planetree Philosophy and Model of Care Make Sense in the Clinic Setting?

The Planetree philosophy and model of care has been adopted into the hospital culture successfully for many years. It started in this setting and continues to transform hospital cultures. This model now is being adopted into medical groups and clinics, and the Planetree philosophy is one that aligns naturally to this environment for the following reasons:

1. Clinics and the care providers tend to have longer-term, consistent relationships with patients and families. It's these relationships that enable all of the components of the Planetree model to be realized and continuously enhanced.
2. Clinics have high volumes of patients and families receiving care every day. Even with short visits, clinics can impact a large number of people in their communities. The Planetree model, therefore, can greatly enhance the health care experience for communities.
3. The community impact is even greater when the Planetree clinic is aligned with a Planetree hospital.
4. The Planetree components (see Section 19) apply to hospital and clinic settings alike.
5. Personalizing, humanizing and demystifying the health care experience of your patients will set your medical group apart from others, creating greater patient loyalty.



Champion Identification Your Journey's Guides and Captains

Medical Group Champion

Think back on some of your best travel experiences (or what you would consider the ideal experience). Chances are, they were well planned and led by a very enthusiastic, energetic and dedicated tour guide. The Planetree Champion is your ultimate tour guide - your journey's captain. It is essential that your Champion be a recognized leader who has genuinely adopted and consistently demonstrates the Planetree philosophy. Add to this, enthusiasm, energy and dedication and you have just identified your Champion. The role of the Champion (your captain) is to lead, guide, teach and encourage every effort, every step of the way. Specifically, the Medical Group Champion:

- Chairs your Steering Committee to:
 - Prioritize Planetree initiatives
 - Develop the implementation process
 - Develop the education plan
 - Select, direct and guide the Work Teams
 - Guide the Staff Action Committees
 - Set the example
- Aligns the Planetree philosophy and model of care with the medical group's business plan and strategic objectives;
- Leads the culture transition;
- Identifies best practices and facilitates information sharing;
- Removes barriers to the implementation of and continued transition to the Planetree philosophy and model of care;
- Develops necessary budgets (per the direction of your Organizational Leader Champion) for your medical group's Planetree journey;
- Focuses on and measures outcomes (e.g. patient satisfaction, employee engagement, financial);
- Consistently demonstrates unwavering support of and belief in the Planetree philosophy and model of care.

You may need more than one Medical Group Champion (captain) if you have a large, geographically disbursed organization. If this is the case, your Planetree journey implementation may occur at different times in different locations or markets. You need to make the determination what makes the most sense for your organization.

Organizational Leader Champion

Depending upon your medical group's size and structure, you may determine the need for one individual in the organization who has the ultimate responsibility for your Planetree journey. Chances are, if you already have started your Planetree journey, your Organizational Leader Champion paved the way for your implementation to begin. If you recall the premise in this manual's introduction,

Leadership already has adopted this philosophy and model of care and wants the medical group to move forward.

your Organizational Leader Champion is this leadership. This individual is the primary contracting point between your organization and the Planetree Members network and makes the overall budget and revenue decisions. Where our Medical Group Champion is the captain along your journey, the Organizational Leader Champion approved the captain and funded the journey!

Physician Champion

Physician leadership is essential in any well-run medical group. It also is essential in your Planetree journey. Depending upon your size and structure, your Planetree Physician Champion may also be your Organizational Leader Champion. Either way, your Physician Champion must demonstrate key characteristics and skills:

- Openness to all viewpoints and opinions;
- Superb listening skills;
- Genuine commitment to the Planetree philosophy and model of care;
- Availability of time and energy;
- Earned respect of staff and colleagues;
- Respectful and professional interactions and influence;
- Humbleness;
- Sense of humor.

Choose your Physician Champion carefully. The dynamics and successes of your Steering Committee will be greatly determined by your Physician Champion. Your journey will go no where if the Steering Committee members are not able to interact and communicate openly and on a level playing field. If your Physician Champion is domineering or intimidating, your journey will take many long and unproductive detours—ending in a dead end. On the other hand, if your Physician Champion demonstrates the characteristics and skills outlined, get ready for an incredible and rewarding ride!

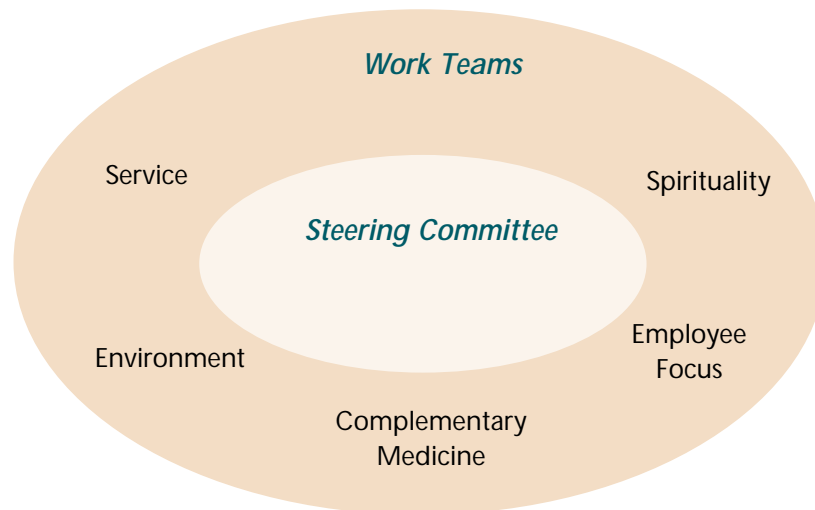


Structure Identification and Formation

Developing Your Journey's Map

A well-planned journey needs a well-organized and effective “map” if you will. The map is your continuous point of reference, serving as a guide for the beginning of your journey, a tool for refocusing should you become lost, and a resource for future points of interest. The map, in our Planetree journey, is the structure developed, implemented and maintained. The typical Planetree structure is as follows:

Staff Action Committees



Steering Committee

Your Planetree Steering Committee is the oversight group for your Planetree journey. Led by your Planetree Champion, the Steering Committee is your “compass.” It develops the “map” for your Planetree journey and sets your overall direction. The Steering Committee also oversees ongoing activities, assuring that you always point toward your “magnetic north.” Section 7 of this manual provides detailed information on the Steering Committee Charter.



Work Teams

The Work Teams research and plan many of your “excursions,” which may include service, environment, complementary medicine, employee focus or any other excursion your medical group develops. Work Teams usually are long-term groups that concentrate on their specific excursion. For example, a complementary medicine work team may research the use of aromatherapy in the clinic setting, establishing policies and procedures for implementation. This work team then may do the same for massage therapy, acupuncture and so on. Where the Steering Committee is your “map maker,” the Work Teams are your ultimate “itinerary masters.” Section 7 of this manual provides detailed information on the Work Team Roles and Responsibilities; Section 15 of this manual describes the Work Team Leader selection and training, and the first Work Team meeting.

Staff Action Committees

And now, the travels begin! The Staff Action Committee (SAC) is the local tour guide (you have many tour guides throughout your journey, by the way), whether following (implementing) the itineraries developed by the Work Teams or developing and implementing their own side trips. Staff Action Committees are formed at the clinic or department site (whichever works best for the medical group) and are comprised of staff members from that clinic or department. The Staff Action Committees are where “the rubber meets the road” for your travels. Section 7 of this manual provides detailed information on the Staff Action Committee Roles and Responsibilities; Section 16 of this manual describes the SAC Coordinator selection and training, and the first SAC meeting.



PLANETREE



Steering Committee and Work Team Member Identification and Criteria

Steering Committee

Successful implementation of the Planetree philosophy and model of care requires identifying the right individuals to lead your travels. Once your Planetree champions are identified, the remainder of the Steering Committee should be selected based upon their individual talents and positions within the organization. The following are some key characteristics and considerations for your Steering Committee members:

- Members must have a genuine belief in the Planetree philosophy and model of care.
- They should represent various areas and positions in the organization (e.g. management, staff, clinical, business), without over emphasis in one area (e.g. too many managers or human resources representation).
- They should be well-respected and effective communicators — after all, they are your journey's navigators.
- You should consider selecting your Steering Committee members prior to introducing the Planetree philosophy and model of care to your employees. This establishes the Steering Committee as the identified compass up-front for your journey and alleviates the potential need to decline requests to be selected for the Steering Committee. The members of the Steering Committee and their ability to lead this journey and direct the vision are vital to the success of your Planetree implementation.

Work Teams

One of the first tasks of the Steering Committee is to identify the initial Planetree Work Team(s) and their members. At least one member of each Work Team should be a member of the Steering Committee to provide that essential connection. As described in the previous section, the Work Teams research and plan your "excursions," and they should be identified based upon your medical group's needs and priorities. For example, if your organization is strongly focusing on service, you could establish a Service Work Team. The following are just a few examples of Work Teams that are in place throughout Planetree affiliate organizations:

- Service
- Environment
- Complementary Medicine
- Spirituality
- Pet Therapy
- Employee Focus



As with the Steering Committee, you need to identify the right individuals for your initial Work Teams (and all future Work Teams for that matter). These members also should be selected based upon their individual talents and positions within the organization. The following are some key characteristics and considerations for your Work Team members:

- Members must have a genuine belief in the Planetree philosophy and model of care.
- They should represent various areas and positions in the organization (e.g. management, staff, clinical, business).
- They should be well-respected and effective communicators.
- As with the Steering Committee, and for the same reasons, the initial Work Team members should be identified prior to introducing the Planetree philosophy and model of care to your employees. The Steering Committee identifies the members for your initial Work Teams and any future Work Teams formed.
- The Steering Committee also should identify a Work Team leader or co-leaders who have the skill set and experience to lead a team. This is a vitally important decision and can mean the difference between a highly effective and highly ineffective Work Team.
- Section 15 of this manual goes into more detail on the recruitment of Work Team Leaders, their training, and the first Work Team meetings.



PLANETREE

Initial Presentation Development/Business Case *“Pointing Your Team Toward Magnetic North”*

We all like to learn about our upcoming travels, experiencing the anticipation and excitement of all the wonderful places we'll see and experiences we'll have. Your Planetree journey is no different - you need to generate that same anticipation and excitement. This is wonderfully accomplished with a brief presentation or “travelogue” describing the Planetree philosophy and model of care; the Planetree mission and components; the history of Planetree; the structure and processes; and the business case (or, “How do we know Planetree is working?”).

People perform at their best when they unite with a clear sense of vision - the “Magnetic North.” If this vision is compelling, it draws people together and moves them forward. Your initial Planetree presentation needs to focus your staff away from the routine, day-to-day and inspire them toward “Magnetic North,” - the limitless possibilities that the Planetree philosophy and model of care can bring to your organization.

The business case provides actual and measurable results from other Planetree affiliates. These may include increased patient satisfaction, decreased staff vacancy and turnover rates, increased employee engagement measurements, improved financial performance, and so on. The Planetree Members network has significant information and affiliate contacts that can be used in developing your business case.

This initial presentation truly is your travelogue - only it is describing the journey to come using the snapshots and travels of other Planetree affiliates. Your goal of this presentation is to create the Planetree vision (your Magnetic North) that provides the enthusiasm and excitement with your staff, inspiring them to embark on this journey. Section 9 of this manual provides recommendations on the process and audiences of this presentation. The following pages provide some examples from the initial Planetree presentation used by Aurora Health Care.

Example Initial Presentation

Planetree Introduction

- What is Planetree?
- Aurora's journey
- Business Case
- Structure
- How do we make it happen?

What IS Planetree?

The **Planetree Model** is committed to enhancing health care from the **patient's perspective**.

Angelica Thieriot Planetree Founder



"...the ideal hospital would combine the best of modern technologic medicine, with the best possible patient care experience to become a truly healing environment, where just being there is healing".

Planetree was founded in 1978

What IS a Planetree?

Planetree took its name from the sycamore tree, under which Hippocrates taught his students.



Study Findings That Indicate Patient Centered Care Advantage

- Higher overall satisfaction on the Planetree unit
- Greater opportunity to see family and friends
- Greater satisfaction with architecture and environment
- Learned more about illness and self care
- Greater patient involvement in the care process

Planetree Components

- Human Interaction — personalized care, patient advocacy
- Empowering Patients Through Information and Education
- Healing Partnerships — “everyone is considered a caregiver”
- Nutrition
- Spirituality
- Human Touch — communicating care through touch
- Healing Arts
- Complementary Therapies
- Healing Environment
- Healing Communities

Planetree Affiliates (as of March 2004)



Aurora's Planetree History

- 2001 Aurora Health Care/Aurora BayCare Medical Center
- 2003 Aurora Medical Group in Brown, Door and Outagamie County Clinics
- 2003 Converted Aurora Medical Center in Manitowoc County
- 2003 Aurora Medical Center in Oshkosh
- 2004 Aurora Sinai and downtown AMG
- 2005 Aurora Medical Center in Washington County

Value of Planetree Network

- Exchanging of resources/manuals
- Monthly teleconferences
- Consulting services
- Annual Planetree conference

Planetree Philosophy

A better way to deliver health care

Treating the patient as a whole person – body, mind and spirit.

- Healing partnerships between patient and caregiver.
 - To demystify, personalize and humanize health care.
- Opportunity for families to be involved in the healing process

Value of Planetree to Aurora Medical Group

- It is a philosophy of care that we believe fits naturally with the clinic model
- We are pioneers blazing a trail with Planetree
- We are creating our own templates

What Does it Look Like in a Clinic Setting?

- Warm neck roles for patients having procedures
- Rocking chair in waiting area to comfort children
- Food offered after fasting labs
- Aromatherapy
- Blankets for patients
- Children's area in reception
- Volunteers



What Does it Look Like in the Hospital Setting?

- 24-hour visitation
- Arts and entertainment
- Parking program
- Patient care conferences
- Education/resource center
- Pet visitation
- Soft touch – massage therapy – Reiki
- Aromatherapy
- Free TV, telephone and parking
- Family presence in emergency rooms
- Blessing of hands
- Family accommodations
- Residential kitchens with bread making and cooking baking
- Family rooms, lounges
- Artwork
- Decentralized nursing stations
- E-mail and Internet access — resource center on each floor
- Piano
- Patient stories program
- Patient and family charting

Business Case

How do we know it is working?

Outcomes of Implementing Patient Centered Care

Planetree affiliates report both clinical and operational-level benefits as a result of implementing patient/resident centered care:

- Increased Patient Satisfaction
- Decreased Staff Turnover
- Increased Patient Volumes
- Fewer Medication Errors
- Lower Infection Rates
- Average Remodeling Costs

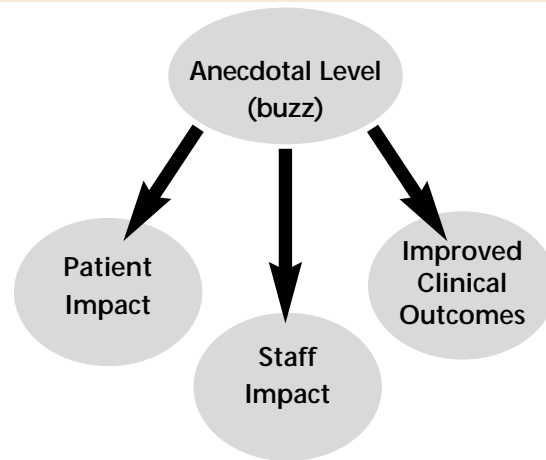
Business Case — Griffin Hospital

- Increase in patient satisfaction
- Decrease in length of stay
- Decrease in cost
- Increase in market share
 - 30% increase in admissions
 - 3.2% operating gain
- Medical claims have gone down (doctors love this)
- Pay is below market salary ranges
- Winner 7 times as *Fortune magazine's* "100 Best Companies to Work For"

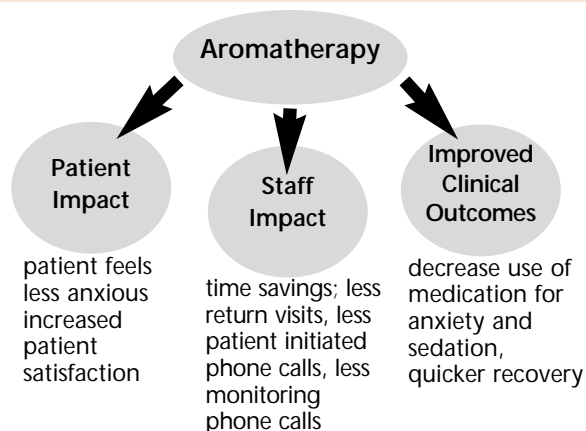
Business Case — Aurora BayCare Medical Center

- Inpatient averaged: 18% higher on patient satisfaction
- Outpatient surgery: 10% higher on patient satisfaction
- Emergency department: 12% higher on patient satisfaction
- Outpatient services: 6% higher on patient satisfaction
- Highest employee engagement among AHC hospitals
- 3% vacancy — RN's
- Overall staff vacancy rate 3%

Business Case Metrics



Litmus Test



Planetree Structure

How it fits together



AMG Structure

Planetree Steering Committee



Work Teams

(Service, Environment, Complementary Medicine)



Staff Action Committees

(at each clinic)

How do we make it happen?

- Hire staff who agree with this philosophy
- New Employee Orientation
- One-day staff retreats
- Education for staff and physicians
- Training for Staff Action Committee Coordinators and Retreat Facilitators

How do you make it happen?

- Realize it's a commitment to a culture
- It is a journey not a destination
- It cannot be made as an excuse to spend unlimited money (goal is cost neutral)
- Is not a marketing gimmick.
- Complements all our existing strategies of Care Management, Service and Diversity

How you make it happen?

"Planetree rests on the foundation of our employees' creativity."

Linda Smith, Administrator
Aurora BayCare Medical Center



PLANETREE



The Paperwork “Trail”

Every successful journey needs some detailed directions. Without them, you become lost, frustrated, disenchanted with the journey, and end up no where. Your Planetree journey is no exception. Your Planetree paperwork “trail” includes the detailed directions for your Steering Committee, Work Teams and Staff Action Committees. Specifically, you must develop your Steering Committee Charter, which outlines the roles and responsibilities of this Committee. The same is needed for your Work Teams and Staff Action Committees. Taking the time and attention to develop your Planetree paperwork “trail” will mean the difference between a successful journey for your medical group or one that goes nowhere. The following pages include examples of these documents.

Aurora Health

Purpose

The purpose of this Charter is to provide a set of guidelines to assist in defining the roles and responsibilities of the Steering Committee.

Membership

The Steering Committee shall be chaired by the Planetree Site Champion, and consist of members from the clinical and non-clinical departments, Ancillary support services, and Physicians. There shall be representatives from both management and non-management positions in the organization. Individual membership shall be evaluated annually. Size of the committee shall range from 8-16 members based on the needs of the organization.

Membership Qualifications:

- Represents a system/entity perspective that thinks beyond the members' primary role in the organization
- Displays enthusiasm about the Planetree model
- Collaborates with others in identifying and solving problems
- Embraces change and continually seek to find better ways to provide healthcare
- Believes patient centered care should drive our decision-making
- Brings values diversity to the team

Additional Champion Qualifications:

- Displays strong facilitation skills
- Displays strong organization skills
- Displays excellent communication skills

Meetings

The Steering Committee shall meet monthly. At a later time in the implementation of the Planetree philosophy, meetings may decrease to meet the organizational needs.

Roles and Responsibilities:

- Assists in development of priorities and direction for Planetree initiatives. Focuses on outcome measures and ongoing evaluations
- Considers the human and financial resources of the organization in the decision making
- The committee will develop and monitor a budget available for the work teams, and staff action committees as appropriate
- The committee will oversee Work Team progress, and ensure that effective communication strategies are utilized for effective implementation of Planetree initiatives
- The committee members will seek to increase their understanding of Planetree principles and promote Planetree with both employees and the public to foster a patient-centered health care environment
- A committee member will act as a liaison on each work team. The committee member will assist the team in determining resources, accessing networking information, preparing summaries for presentation to the committee and providing feedback to the committee in the event the work team leader is not available



Aurora Health Care Planetree Work Team Description

Definition

The Work Team is comprised of staff members, which may include physicians, who form a committee and are recommending guidelines, solving problems, and generating ideas which can be implemented to support the identified Planetree initiative. Each Work Team will have a clearly defined purpose. Some Work Teams may be developed to address a specific need and will dissolve once the initiative is implemented and/or guidelines established. Other Work Teams may be ongoing, i.e. Communication Work Team.

Membership

The Work Team will be comprised of approximately 6-10 members. One member of the Planetree Steering Committee will serve as a liaison to the Work Team. Members of the Work Team may be selected in several ways: volunteers, selection, or election. In the event of an ongoing Work Teams the group will determine the length of the term.

Team Member

Team members all share responsibility for the work of the team, both in meetings and outside of meetings. In addition to these responsibilities, some members will have additional roles outlined below.

Team Leader

A chairperson or co-chairpersons need to be identified. The role of this individual is to:

1. Coordinate and guide the work of the team.
2. Set meeting times and locations.
3. Establish agendas for meetings; keep meetings focused on defined outcomes and work team meeting summaries are kept and centrally located.
4. Communicates progress with steering committee.

Team Recorder

The recorder helps to maintain a record of the team's work. The recorder completes the work team meeting summaries. The recorder works with the team leader to prepare and distribute meeting agendas.

Functions

- Establish a Purpose Statement
- Establish initial outcomes expected
- Establish initial goals and timelines
- Review existing resources available (i.e. other Planetree facility programs)
- Determine resources needed to accomplish goals (i.e. financial, staffing, etc.)
- Draft Policy & Procedure as appropriate to be approved by the Steering Committee
- Work Team assists in the implementation of the initiative
- Review and evaluate initiative effectiveness and implementation strategies. Adapt/revise to meet organizational needs

Planetree Work Team Assessment

Please complete this form and return a copy to the Planetree Steering Committee

Work Team leader(s) _____

Work Team Name/Focus _____

Defined purpose and outcomes:

1. _____
2. _____
3. _____
4. _____

How will you measure or evaluate these outcomes?

1. _____
2. _____
3. _____
4. _____

What is the proposed timeline for:

Initial report to the Planetree Steering Committee? _____

Final presentation to Steering Committee? _____

Implementation of initiative? _____

Evaluation of effectiveness _____

Recommended length of Work Team commitment (e.g. 2 months, Ongoing) _____

What type of support do you need to accomplish the Team's goals, i.e. financial, staffing, etc.?



Aurora Health Care Planetree Staff Action Committees *Purpose, Membership and Responsibilities*

Purpose

The Staff Action Committee is a group of staff members which forms a clinic committee authorized to make decisions, solve problems, or generate ideas which can be implemented. The group will focus on taking action to change something and not merely spend time identifying and discussing issues or concerns. The group will focus on issues that relate to their site only and not items that will impact other sites.

Membership

A Staff Action Committee will have members who represent all positions and services in the clinic. Each member must be in good standing within the organization. Usually the group comprises about 6-10 staff members. Staff members may be selected in several ways: volunteers, selection, or election. The group should decide term length.

Staff Action Coordinator

A Staff Action Coordinator(s) needs to be identified for each clinic Staff Action Committee. The role of this individual is to:

1. Set meeting times and locations;
2. Establish the agenda for each meeting and keep the meetings focused on the agenda.
3. Assure that group actions or decisions are recorded and distributed;
4. Serve as liaison to the Work Teams and the respective site manager.
5. The Staff Action Coordinator term will be a calendar year.

Sample continued on next page

Sample continued from previous page

Staff Action Coordinator Selection Process

The following is the process to be followed each year (in November) for the selection of staff action coordinators:

1. A poster is created by Organizational Development to inform the staff members of each site that the staff action coordinator position is available. This poster will list the roles and responsibilities, qualities desired, etc. for the staff action coordinator position. The poster will be placed in the employee breakroom for at least two to three weeks, asking for anyone interested to submit their name to the site manager.
2. Any individuals submitting their name to the site manager will be considered for the position of staff action coordinator. Any number of employees may share the role of staff action coordinator.
3. The Staff Action Coordinator will be selected by the site manager. The term of the Staff Action Coordinator will be for one year.

Responsibilities

There are four primary responsibilities of the Staff Action Committee. These include:

1. **Developing a communication network.** The network links all staff members with the Staff Action Committee members. Each Committee member forms a formal link with a defined group of clinic staff members. Each Staff Action Committee member is responsible for soliciting input from the defined group that will be used in the Committee's decision-making and recommendations. The Committee members are then responsible for communicating information back to their assigned communication network. This is the best way to maintain openness between the Committee and other clinic staff members.
2. **Improving interpersonal relationships.** The Staff Action Committee will actively work on developing and maintaining healthy interpersonal relationships. Relationships must be founded on openness, honesty, functional trust and respect.
3. **Developing recommendations and making decisions.** The Staff Action Committee will actively work on the initiatives suggested by the Work Teams and the Steering Committee. The Staff Action Committee also will provide feedback to the Work Teams and Steering Committees on their recommendations and decisions for actions within the clinic, and any other recommendations, comments and concerns. The Staff Action Committee Coordinator will also develop a partnership with their respective department manager to provide feedback, brainstorm ideas and solutions, and communicate ideas and concerns of the respective departments.



4. Working within the process. The Staff Action Committees will receive information and guidance from the Work Teams regarding initiatives to be addressed in the clinic. The Staff Action Committee will work within these guidelines as they develop processes and make recommendations on how the initiative can be implemented at their particular clinic. The Staff Action Committees will use a consensus decision-making process. All issues and concerns addressed within the Staff Action Committee should be in compliance with organizational policies and procedures.

Authority of the Staff Action Committee

When the Work Teams provide information and guidelines on initiatives, they also will identify the level of authority by which the Staff Action Committee will address the initiative. The Work Teams may defer the level of authority determination to the clinic's site manager. The levels of authority are as follows:

1. **Level 1:** Data Gathering – Collecting information and feedback on a particular initiative.
2. **Level 2:** Data Gathering and Recommending – Collecting information and feedback on a particular initiative and making recommendations on implementation.
3. **Level 3:** Data Gathering, Recommending and Acting – Collecting information and feedback, making recommendations and implementing the initiative. This process will involve inclusion of the clinic's site manager.

Guidelines for an Effective SAC

The following guidelines may be used to evaluate the effectiveness of SAC (Staff Action Committee). These are key considerations in establishing and maintaining a quality SAC. It would be helpful to review the criteria at frequent intervals as a check in helping the SAC continue to progress.

1. Schedule of meetings is posted and followed
2. Establish meeting guidelines
3. Communication network is posted and reviewed frequently
4. Agendas for meetings are posted a week in advance
5. Good attendance occurs
6. Issues brought to the group are addressed appropriately
7. Consensus decision making is the process used
8. Minutes are completed and shared

Whenever one of these steps is absent the SAC must re-evaluate and make a change in the process that is not being followed.



Initial Steering Committee Meeting

You are now prepared for your first excursion on your Planetree journey – the initial steering committee meeting. At this meeting you truly will set the course for your organization's journey, reviewing and finalizing your initial work, and discussing next steps. An effective itinerary (agenda) for this meeting should include:

1. Review of Initial Presentation and Business Case
2. Review and Adoption of Steering Committee Charter and Roles and Responsibilities
3. Review and Approval of Initial Work Team Members; Identification of Work Team Leaders
4. Discussion and Agreement on the Education Plan (see Section 9 of this manual for more information on the Education Plan)
5. Agreement of the Steering Committee Meeting Schedule

1. Review of Initial Presentation and Business Case

The Initial Presentation and Business Case should be presented to the Steering Committee in the same format it will be used with other audiences. This will allow the Steering Committee to view the actual presentation and make any final revisions. While you already may have used this presentation with your organization's decision makers as a means to gain support for your Planetree journey, the Steering Committee should review it as well for future presentations.

2. Review and Adoption of Steering Committee Charter and Roles and Responsibilities

In Section 7 of this manual, you developed the Steering Committee Charter and the Roles and Responsibilities of the Work Teams and Staff Action Committees. These now need to be reviewed, finalized and approved by the Steering Committee. Your paperwork "trail" is now cleared for your journey.

3. Review and Approval of Initial Work Teams; Identification of Work Team Leaders

Sections 4, 5 and 15 of this manual describe the Work Teams – their focus, formation and leadership needs. At this initial Steering Committee meeting, these first Work Teams and their members need to be finalized and approved. In addition, the Steering Committee should select a leader for each Work Team and complete the Work Team's Initial Assignment worksheet.

4. Discussion and Agreement on the Education Plan

The Planetree philosophy and model of care is an important cultural shift for any organization – and changing a culture takes significant efforts and time. This is the reason it is considered an ongoing journey and not a short-term event. Changing a culture also is the reason why education of everyone in the organization is essential. Your Steering Committee needs to plot the course for educating the entire organization on the Planetree philosophy and model of care — initially and continuously – at this first meeting.

5. Agreement of the Steering Committee Meeting Schedule

This may appear fundamental, however, setting a regular meeting schedule for your Steering Committee establishes a consistent and effective course. As you first set sail on your Planetree journey, these meetings may occur more frequently – you will need to determine the frequency based upon your organization's needs.

Your initial Steering Committee meeting is now complete. You have just developed your Planetree map and set the course for your journey. Smooth sailing!



Education Plan

A successful journey is one that is well promoted and one that builds enthusiasm and momentum every step of the way. Promotion. Enthusiasm. Momentum. These are the cornerstones of your education plan. You have many different stakeholders in your medical group that learn in different ways and at different paces. The education plan that your Steering Committee develops needs to address these various stakeholders, their learning styles and the point in time of your Planetree journey. The remainder of this section provides suggestions and an overview of various educational events that promote the Planetree philosophy, build enthusiasm and retain momentum. Sections 10 through 14 of this manual provide more detail and examples for each of these events.

Introductory Presentations

Section 6 of this manual describes the initial presentation and business case of the Planetree philosophy and model of care — your travelogue. This is the presentation you will use to introduce and “promote” Planetree to your various stakeholders. These introductory presentations should be made to physician leadership, management teams and all employees. This is an important first-step on your Planetree journey’s educational road - it provides everyone with a glimpse of what’s to come and your limitless possibilities in a Planetree culture.

Steering Committee/Work Team Member Retreat and Full-Day Staff Retreats

By now, you have identified your Steering Committee members (and have met a few times) and your initial Work Team members. These are the individuals who will “pilot” your first full-day initial retreat. The Steering Committee/Work Team Retreat, for the most part, will follow the same format and contain the same content as the staff retreat. It should contain some additional guidance on leading others along the Planetree journey. It is important to evaluate this “pilot” retreat and make appropriate modifications to assure the staff retreats provide for a thorough understanding of and enthusiasm for the Planetree philosophy, and the initial momentum needed to begin your staff’s journey. Section 11 of this manual describes the full-day initial retreat and provides an example outline.

Provider Education

On the ideal journey, all physicians in your medical group also would attend the full-day retreats with your staff. If you are able to accomplish this, you are off to a phenomenal start to your culture change. Realistically, however, physicians often are a segregated group from the rest of the staff (usually by choice and ownership necessity), and, therefore, require a revised approach to learning the Planetree philosophy and model of care. The physician initial retreat is a revised, often-shortened version of the staff retreat. Physician leadership promotes and invites (or requires) all physicians to attend. In addition, as you travel further along your Planetree journey, a physician continuing medical education (CME) program can continue to build upon your physicians’ necessary involvement. Section 12 of this manual provides further information and examples of both the initial provider retreat and CME program.

New Employee and Provider Orientation

Once your initial presentations are complete, it still is important to give all new staff and physicians a sneak preview of Planetree (prior to their full-day, initial retreats or provider CME programs). This is easily accomplished by incorporating the content of your initial presentation and business case into new employee and provider orientations. These orientations are described further in Section 13 of this manual.

Annual Employee Retreats

Retaining momentum! This is absolutely essential in any culture change and certainly true for your Planetree journey. While the full-day, initial retreats focus on the overall philosophy and model of care and the components of Planetree, the annual retreat takes you on an in-depth site-seeing tour. Typically, these retreats are designed around a specific area or component of Planetree (e.g. complementary and alternative medicine, P.H.D. of Planetree), and are a few hours in length. All staff who have completed the full-day, initial retreat should be required to attend. Section 14 describes these annual retreats in further detail and provides example outlines.

Timeline

Establishing your education timeline is an important task of your Champion and your Steering Committee. The timing of each step in your education plan is essential to a well-planned, well-executed journey. The following is a recommended timeline for an education plan:

Month 1

Steering Committee and Initial Work Team Members Finalized

Month 2

Introductory Presentations to Key Stakeholders

Month 3-4

Introductory Presentations to All Physicians and Staff

Month 4-5

Steering Committee/Work Team Members Full-Day Retreat

Month 5 and ongoing

Full-Day, Initial Retreats for All Staff

Month 5-10

Provider Retreat

Once Each Year

Annual Employee Retreats

Ongoing

New Employee and Provider Orientation

Ongoing

Physician CME



Introductory Presentations

As noted in Section 9, the introductory presentations are given to physician leadership, management staff and the general staff. They include your initial presentation and business case described in Section 6 of this manual.

Physician Leadership

Physicians are very committed to making health care better for their patients. It is recommended to start your introductory presentations with your physician leadership groups. Whatever your structure, you need to identify the physician leadership groups that need to be introduced to the Planetree philosophy and model of care. You also need to emphasize the importance of physician leadership support of Planetree with all employees and their physician peers as you begin and continue down this journey. Without this support, the enthusiasm and momentum will fizzle and your staff will run out of gas — a set-back in any journey.

Management Staff

As with physician leadership, you need to identify the management groups in your organization that will be audience to the introductory presentations. These can be given at the same time as the physician leadership presentations, or immediately following, but before the staff presentations. Your managers need to understand everyone's role in this culture transition — their own, their staff and the physicians. It also is important for your management staff to fully support the Planetree philosophy and model of care, and this culture change - for the same reasons as with physician leadership.

General Staff

Once you have completed the introductory presentations with the physician leadership and management groups, launch them with the remainder of your staff. Remember, you are promoting and beginning to build enthusiasm for the Planetree philosophy and model of care. Don't be surprised if some of your employees become immediately engaged and want to set sail as soon as possible on your Planetree journey. These same individuals, more than likely, will be the first to volunteer to serve on the Staff Action Committee and become Staff Action Committee Coordinators (see Section 16 of the manual). Recognize and encourage their enthusiasm, and communicate clearly in this introductory presentations your Planetree implementation path and timeline. All of your staff, in particular these early adventurers, need to know that the Planetree philosophy and model of care is a change in culture that will require ongoing learning. It is not here today, gone tomorrow (a hope of some of your reluctant travelers).

Presenters

Selection of your presenters for these introductory sessions is an important decision at this point in your journey. The following are necessary characteristics your presenters should demonstrate:

- A clear understanding of the purpose and components of the Planetree philosophy and model of care, and the presentation's content and flow
- Enthusiasm
- Training and presentation skills
- The ability to articulate to and inspire the staff on the impact they can make in creating an environment conducive to healing, emphasizing the reason why they chose health care as their profession
- The ability to convey that the Planetree journey isn't another new program, a "magic" organizational pill, a buzz word or the promise-of-the-month - with a great take-off now and an end of the road in sight



PLANETREE



Full-Day, Initial Retreats

If your initial presentation and business case is your “travelogue,” the full-day, initial retreat is the entire book. This retreat sets the course for your staff for your entire Planetree journey.

Retreat Design

Your full-day, initial retreat must be carefully designed so the content lays the foundation for the Planetree philosophy and model of care in your organization, and provides for an engaging experience for staff. Your primary objectives of this retreat are:



- To achieve with all employees a full understanding of the Planetree mission and components;
- To provide to all employees an engaging learning experience of the Planetree components, giving them tangible examples of each;
- To achieve with all employees a full understanding that this is a change in culture - not a single event or program;
- To recognize the “Planetree moments” already exemplified in the organization;
- To build upon the initial enthusiasm realized from the introductory presentations;
- To build upon the number of employees who become engaged with Planetree, adding to those who did so immediately in the introductory presentations;
- To give a clear message to employees that the Planetree philosophy and model of care culture is the expected culture for your organization.

The following pages provide an outline for and description of a full-day, initial retreat as a guide in designing your organization’s retreat.

...moments are happening in our site. But the moments don't happen as consistently as we need or want them to happen. We want these moments to happen more broad based. We want these moments, in many cases, to be "planned" moments.

"Planetree: In Our Own Words" video - view an internal video of our staff talking about Planetree experiences they have had. Participants complete a worksheet identifying the specific components the colleague is sharing.

III. Family, friends and social support

All participants are assigned a caregiver for the rest of the day. The pair complete an exercise that identifies the patients needs and wishes during care.

BREAK — review nutritional and complementary medicine materials
Nutritional and complementary medicine materials are on the table for participants to review.

IV. Human touch

Massage applied to the hands provides caregivers with an easy accessible option to make the human connection using compassionate and safe contact. Demonstration on how to give a hand massage. All participants give hand massages to each other.

V. Spirituality

Addresses the purpose of spirituality — to honor the whole person and all that person's life reflects. Share "blessing of hands."

VI. Healing Arts

Participants view clinic and hospital patient charts to discover the lack of "personal" information. Discussion of why it is important to "humanize" the patient and family experience and ideas on how to do this.

VII. Empowering Patients Through Information and Education

Participants attempt to identify the meaning of each of three paragraphs, containing police jargon, information systems jargon, and hospital jargon. Parallel is drawn to the lack of "common" language used in the health care environment and the effect on our patients and families.

VIII. MapQuest

Discussion of the specific clinic/hospital Planetree structure, and how they can be involved in the Planetree efforts.

IX. Blindfold Experiment

Through this exercise, participants experience some of the fear and anxiety patients feel in the hospital or clinic setting. The goal is to change the way the caregiver interacts with patients or co-workers.

X. Architectural Design

Through an exercise called "Trip To Mars," participants gain insight into the importance of "recreating" in a hospital/clinic setting the "feel," "smell," "sound"...that are pleasant to them.

XI. In The Tree House

Participants play the exciting and interactive Planetree Board Game, "In the Tree House," in which the participants apply their working knowledge of the Planetree philosophy and components.

XII. In The Name of Planetree

This activity illustrates responsible freedom tree, and how it could be applied in Planetree situations that have happened within the hospital/clinic.

XIII. Closure



Retreat Facilitators

Equally important to your retreat design is your selection and training of your retreat facilitators. As with your introductory presentations, your full-day, initial retreat facilitators need to be fully versed in the Planetree philosophy and model of care; fully trained in the presentation content and flow; and enthusiastic, inspiring and talented educators. These individuals need to be chosen from and represent all areas and positions within your organization. A powerful combination is a clinical facilitator partnered with a business facilitator for each retreat. These facilitators are your retreat tour guides for this all-important beginning in your Planetree journey.

At the same time you develop the content and flow of your full-day initial retreat, you need to develop the facilitators “field” guide. This guide provides the additional information (background, data, scripts, stories) and appropriate prompts (overhead, flipchart, video, handouts, activity) needed by the facilitator to effectively move through the retreat content.

While an important first step, a thorough and comprehensive field guide alone does not assure success for your retreat tour guide. Facilitator training is strongly recommended. Depending on your organization’s resources, you may accomplish this through internal or external means.

To assure you have the right tour guides for your retreats, developing a facilitator certification process is quite effective. A second very important outcome of this certification is that it expands the number of individuals engaged in and leading your Planetree efforts. Your group of certified facilitators may or may not include members of the Steering Committee, Work Teams or Staff Action Committees — the more you spread involvement out, the better for your culture transition.

The objectives of facilitator training are:

1. To achieve a comprehensive understanding of their role as a facilitator, and the impact they have as facilitators on the successful implementation of the Planetree philosophy and model of care throughout the organization;
2. To share their own stories and experiences, and hear others facilitators’ stories and experiences as they relate to the Planetree philosophy and model of care — these will provide powerful examples they will use with their own retreat participants;
3. To provide facilitation and group dynamic tools to assure a highly participative and focused retreat.

The following is a general overview of an example facilitator certification process:

The overall training strategy will be based on eight topics and skill sets that have been identified as critical to successful facilitation.

The eight Topics and Skill Sets include:

Getting started: empowering, informing, exciting and involving participants.

Focusing the group: establishing the course and avoiding detours.

Establishing trust: supportive versus defensive climates; understanding the process.

Communication skills: listening, talking and confrontation.

Information gathering: questioning techniques and other tools.

Dysfunctional behavior: prevention, detection and resolution.

Keeping energy high: setting the pace, anticipating lulls, reacting accordingly.

Closing the session: review, evaluate, close, debrief.

Facilitator Certification Process

The process for facilitator certification will include:

Step One

All candidates will attend a two-day Facilitator Training Session. The session, which explores how adults learn and how best to engage them, will enable you to capture and maintain the interest of your participants from the very beginning. In this fast-moving workshop, staff will learn how to deliver training in ways that quickly build their credibility. The session incorporates the eight Topics and Skill Sets previously discussed. It will cover basic facilitation of adult audiences, and facilitation skill assessment and development, using the Facilitator Skills Profile instrument and videotaping of candidates' facilitation using the Planetree Retreat as the structure.

Step Two

Candidates will attend another Continuing Education class (Communication, Conflict, Listening Interpersonal Style, etc.) and observe the facilitator, using the Facilitator Skills Profile instrument. The goal of this observation session is for the learners to familiarize themselves with the instrument and to observe different facilitation techniques. The focus is non-content related; thus we recommend observing a non-Planetree event.

Step Three

Candidates will set up a mock 15-minute Planetree presentation that will be videotaped. After evaluating their session using the Facilitator Skills Profile instrument, they will set up a private one-hour videotape review session with a Planetree Facilitator coach to address their personal skill development.

Step Four

Candidates will be observed (by a Planetree Facilitator Coach) co-facilitating a Planetree Retreat and be evaluated on their competency. Feedback will be provided using the Facilitator Skills Profile instrument.

Step Three and Four Repeated

Candidates will set up a private videotape coaching session to address developmental needs observed and identified during "REAL" facilitation. (Continue as needed.)

Step Five

Successful Planetree facilitation certification is obtained when candidates have successfully completed steps 1-4, and demonstrated excellence in the facilitator profile competencies.



Provider Education

In Section 9 of the manual, the education plan overview described the ideal in provider education – that all providers attend the full-day, initial retreat with the staff (and all subsequent education sessions for that matter). If you start your journey out achieving this – congratulations, pass “Go,” and collect your \$200! And, travel on to Provider CME in this section of the manual! In this day, however, of increased and continued pressure on provider productivity, and the segregated reality between providers and the staff, attendance at a full-day retreat could be difficult to achieve. For these reasons, a shortened version of the full-day, initial retreat, targeted solely at the providers, can provide an excellent introduction and overview of the Planetree philosophy and model of care. The goals of this retreat are the same as those for the full-day retreat with a few revisions and additions:

- To achieve with all providers a full understanding of the Planetree mission and components;
- To provide to all providers an effective and concise learning experience of the Planetree components;
- To achieve with all providers a full understanding that this is a change in culture — not a single event or program;
- To recognize the “Planetree moments” already exemplified in the organization;
- To recognize the initial enthusiasm realized by staff in the introductory presentations and build upon this enthusiasm;
- To build upon the number of providers who become engaged with Planetree, adding to those who did so immediately in the introductory presentations;
- To give a clear message to providers that the Planetree philosophy and model of care culture is the expected culture for your organization;
- To set the expectation from **physician leadership** that all providers support the staff throughout this journey;
- To set the expectation from **physician leadership** that all providers actively travel along this journey.

These last two goals are essential to achieve in the provider retreat. Notice as well, the emphasis placed on physician leadership. Culture changes must begin with the organization’s leadership – a fact even more critical in physician groups. Physicians set the tone, the attitude and the expectations in their clinic settings. Your physician’s leadership must assure that these exemplify the Planetree philosophy and model of care.

The following provides an example invitation and agenda of a provider retreat:

October 2003

*"To be successful, you have to have your heart in your business
and your business in your heart."*

— Thomas Watson, Sr. (1874-1956)
Founder, IBM

TO: AMG Providers in Brown, Door and Outagamie Counties
FROM: AMG, MD, President, Aurora Medical Group
RE: Provider Planetree Presentation

Please accept this invitation to join me at our first Planetree presentation developed for Aurora Medical Group providers in Brown, Door and Outagamie Counties. Your clinics are the first in AMG to adopt the Planetree philosophy and model in the clinic setting, as well as the first medical group from all Planetree affiliate organizations.

While still in the early stages, it is important that our staff and all providers understand Planetree and the opportunities of this philosophy in the clinic setting. For this to be successful, it is essential that we have full participation and support from our providers at this presentation.

Join me: Tuesday, November 18, 2003

5:30 p.m. Dinner

6 to 8 p.m. Presentation

Aurora BayCare Medical Center

Community Classrooms A and B

2845 Greenbrier Road

Green Bay, WI

Agenda

- | | |
|------------------|--|
| 5:30 – 6:00 p.m. | Buffet dinner |
| 6:00 – 6:05 p.m. | Welcome and introductions by AMG, MD President, AMG |
| 6:05 – 6:45 p.m. | Components of the Planetree Philosophy by Laura Gilpin |
| 6:45 – 7:00 p.m. | Ark simulation by Laura Gilpin |
| 7:00 – 7:10 p.m. | AMG Planetree structure |
| 7:10 – 7:20 p.m. | Examples of Planetree activities being done with OB/GYN patients |
| 7:20 – 7:45 p.m. | Table discussions generating ideas for Planetree application |
| 7:45 – 8:00 p.m. | Questions and answers/Wrap-up by AMG, MD |



Provider Continuing Medical Education (CME)

A journey with only one sight-seeing tour would be a disappointment at best. Your Planetree journey is no different and – as emphasized earlier – requires continuous enthusiasm and forward momentum. This holds true for staff and providers alike, and is greatly accomplished with annual retreats (Section 14 of this manual provides detailed information on annual retreats). As with the full-day, initial retreats, if your providers attend the annual retreats you are on an excellent path (pass “Go” and collect \$200 again and again). If not (and more realistically), an effective way to keep the Planetree philosophy and model of care in front of your providers is through a continuing medical education program. Earning CME credits is a great incentive for participation; greater participation by providers keeps the enthusiasm and momentum going – a win for everyone.

The following provides an outline example and description of a CME program on Planetree:

Planetree Physician CME Retreat Agenda

1. Opening Exercise

As facilitators greet participants they ask each physician for his/her keys.

2. Welcome – purpose and objective of the program

To be able to articulate Aurora Health Care’s strategic journey in implementing Planetree.

To gain a clear perspective of how your role as a physician impacts the success of the implementation of Planetree.

To demonstrate how Planetree can enhance your clinical and financial outcomes, as well as increase patient satisfaction and loyalty.

3. Planetree Overview

Introduction of Planetree, the founder, and the history of Planetree.

4. Exercise One: Caregiver role/challenges

Identification and discussion of the challenges for a physician to fulfill the “caregiver” role, and the *barriers to patient-centered care*.

5. Planetree Components

Planetree Components and *ACGME Competencies*

6. Exercise Two: Planetree Outcomes and Results

After the Physicians watch a true “Aurora Planetree Moment” on videotape, they complete an exercise that addresses how *patient satisfaction, staff impact, clinical outcomes*, and *business outcomes* are impacted through Planetree implementation.

7. Conclusions and Closing



PLANETREE



New Employee and Provider Orientation

The full-day, initial retreat is the event that starts every new employee (and, hopefully, every new provider) off on the right foot in your Planetree culture. Typically, new employees attend this retreat after working for a few months in your organization. In order to provide some initial understanding of the Planetree philosophy and model of care, prior to the full-day retreat, incorporate a presentation or discussion in new employee and provider orientation sessions. Depending on the structure, format and length of your orientations, you could opt to use the initial presentation and business case you already developed (or versions thereof). As with the introductory presentations, this will spark some enthusiasm for the Planetree philosophy and model of care and begin to build that ever-important momentum. By incorporating a Planetree introduction in your orientation sessions, you've just prepared all new employees for a successful journey. The following is an example outline of an orientation that can be used with new employees and physicians:

Outline for New Employee Orientation of Planetree at Aurora BayCare Medical Center and Aurora Medical Group

What is Planetree?

- Personalize
- Humanize
- Demystify

Creating Partnerships

Beginning of a Vision

Why Planetree?

- JCAHO standards support these principles
- Maintains focus on the patient, their perceptions and needs
- Flexibility to implement ideas and programs
- Increase in staff pride
- Positive impact on clinic and hospital image
- Differentiates us in the marketplace

Planetree Affiliates Named "America's Healthiest Hospitals"

- *Natural Health Magazine* America's healthiest hospitals December 2004.
- The hospitals named offered the best care for your body and soul.
- California Pacific Medical Center (CA), Midwestern Regional Medical Center (IL) Longmont United Hospital (CO), Allegheny General Hospital (PA) and Beth Israel Medical Center (NY)

What Does Planetree Look Like in the Clinic Setting?

What Does Planetree Look Like in the Hospital Setting?

Your role in Planetree

- How to get involved
- Retreats
- Structure



PLANETREE



Annual Employee Retreats

Get ready for your next big sightseeing tour — the annual employee retreat. This special “tour” keeps the enthusiasm and momentum going in your Planetree journey. It is special because you design the itinerary every year to address a very specific topic or topics based on your identified needs — and they will change every year.

Retreat Design

The annual employee retreat typically is two to three hours in length. You need to determine your retreat's focus based on the need your Planetree journey has at that point in time. For example, a first retreat may focus on the P.H.D. (Personalize, Humanize, Demystify) of health care, which gives a great “refresher” on the Planetree philosophy overall. A second annual retreat may focus more specifically on one of the components of Planetree such as Empowering Patients Through Information and Technology.

As with the initial, full-day retreat, your annual retreats need to be engaging experiences for your staff. Your primary objectives of the annual retreat are:

- To achieve with all employees a full understanding of the focused topic;
- To provide to all employees an engaging learning experience of the focused topic;
- To build upon the enthusiasm and momentum already achieved in your Planetree journey;
- To build upon the number of employees fully engaged with Planetree (your goal is 100%, of course, to achieve this culture);
- To provide a forum for sharing successes;
- To continue delivering the message that the Planetree philosophy and model of care is the expected culture for your organization.

The following pages provide an outline and description of an annual retreat example.

AMG Brown, Door and Outagamie Counties Planetree Annual Retreat 2005

1. Purpose and Objectives

- To experience how WE IMPACT the success of incorporating the P.H.D. of Health Care in our daily interactions.
- To enhance the understanding of how Planetree is structured within the clinics, and how you can become more involved.
- To celebrate Planetree ideas and initiatives that have been instituted within the clinics.

2. Activity One: Personalize

Participants view pictures of service providers and discuss the following questions:

- What are your initial feelings and thoughts coming to see this person today?
- What would be the WORST thing the person could do or say to you?
- and the BEST thing the person could do or say to you?

Part 2 of the exercise includes viewing pictures of patients in various situations, and the participants are asked the same questions.

The exercise draws an excellent parallel on how we expect “personalized” service, and how we need to deliver that type of service for our patients and their families.

3. Activity Two: Humanize

Participants play the card game “Super PhuD” — a take off of Old Maid. In the game the players match up the patients with exact issues. The game is concluded with one player having the Super PhuD card.

Discussion of the card pictures draws out specific situations in which humanizing the health care experience is essential.

4. Activity Three: Demystify

Participants pair up to participate in the activity “Mirror, Mirror.” The goal of the exercise is for one partner to describe a picture to the other, so that the partner can recreate the picture exactly. The learning points are then transferred to the health care environment; how difficult it is for patients to understand their providers; how directions and instructions many times feel like a foreign language; and to feel anxious and uncertain. Ultimately our goal as the health care provider is to take the “mystery” out of the experience.

5. Conclusion and Closing

Review and reconsider many of the vital links between **how** we nurture the patient and the healing process itself.

Share and congratulate the participants by viewing video clips of the accomplishments the Planetree teams (Steering Committee, Work Teams and Staff Action Committees) have made throughout the last year.



PLANETREE



Retreat Facilitators

As with the initial, full-day retreat, your retreat tour guides - facilitators - must be carefully selected. They need to be fully versed in the Planetree philosophy and model of care; fully trained in the presentation content and flow; and enthusiastic, inspiring and talented educators.

At the same time you develop the content and flow of your annual retreat, you need to develop the facilitators "field" guide. This guide provides the additional information (background, data, scripts, stories) and appropriate prompts (overhead, flipchart, video, handouts, activity) needed by the facilitator to effectively move through the retreat content.

While an important first step, a thorough and comprehensive field guide alone does not assure success for your retreat tour guide. Facilitator training is strongly recommended. Depending on your organization's resources, you may accomplish this through internal or external means.

To assure you have the right tour guides for your retreats, developing a facilitator certification process is quite effective. A second very important outcome of this certification is that it expands the number of individuals engaged in and leading your Planetree efforts. Your group of certified facilitators may or may not include members of the Steering Committee, Work Teams or Staff Action Committees - the more you spread involvement out, the better for your culture transition.

The objectives of facilitator training should include the following:

1. To achieve a comprehensive understanding of their role as a facilitator, and the impact they have as facilitators on the successful implementation of the Planetree philosophy and model of care throughout the organization;
2. To share their own stories and experiences, and hear others facilitator's stories and experiences as they relate to the Planetree philosophy and model of care - these will provide powerful examples they will use with their own retreat participants;
3. To provide facilitation and group dynamic tools to assure a highly participative and focused retreat;

The following is a general overview of an example facilitator certification process:

The training strategy integrates the use of a coaching tool, Facilitator Skills Profile, to assist the new learner's understanding, development and measurement of their facilitation skills and competence.

The overall training strategy will be based on eight topics and skill sets that have been identified as critical to successful facilitation.

The 8 Topics and Skill Sets include;

Getting started: empowering, informing, exciting and involving participants.

Focusing the group: establishing the course and avoiding detours.

Establishing trust: supportive versus defensive climates; understanding the process.

Communication skills: listening, talking and confrontation.

Information gathering: questioning techniques and other tools.

Dysfunctional behavior: prevention, detection and resolution.

Keeping energy high: setting the pace, anticipating lulls, reacting accordingly.

Closing the session: review, evaluate, close, debrief.

Facilitator Certification Process

The process for facilitator certification will include:

Step One

All candidates will attend a two-day Facilitator Training Session. The session, which explores how adults learn and how best to engage them, will enable you to capture and maintain the interest of your participants from the very beginning. In this fast-moving workshop, staff will learn how to deliver training in ways that quickly build their credibility. The session incorporates the eight Topics and Skill Sets previously discussed. It will cover basic facilitation of adult audiences, and facilitation skill assessment and development, using the Facilitator Skills Profile instrument and videotaping of candidates' facilitation using the Planetree Retreat as the structure.

Step Two

Candidates will attend another Continuing Education class (Communication, Conflict, Listening Interpersonal Style, etc.) and observe the facilitator, using the Facilitator Skills Profile instrument. The goal of this observation session is for the learners to familiarize themselves with the instrument and to observe different facilitation techniques. The focus is non-content related; thus we recommend observing a non-Planetree event.

Step Three

Candidates will set up a mock 15-minute Planetree presentation that will be videotaped. After evaluating their session using the Facilitator Skills Profile instrument, they will set up a private one-hour videotape review session with a Planetree Facilitator coach to address their personal skill development.

Step Four

Candidates will be observed (by a Planetree Facilitator Coach) co-facilitating a Planetree Retreat and be evaluated on their competency. Feedback will be provided using the Facilitator Skills Profile instrument.

Step Three and Four Repeated

Candidates will set up a private videotape coaching session to address developmental needs observed and identified during "REAL" facilitation. (Continue as needed.)

Step Five

Successful Planetree facilitation certification is obtained when candidates have successfully completed steps 1-4, and achieved the facilitator profile competencies.



PLANETREE



Does all of this sound somewhat familiar? It should. Retreat design and facilitation — whether the initial, full-day retreat or each of your annual retreats — should meet similar objectives and have similar outcomes.

The annual retreats allow for great creativity throughout your Planetree journey. Have fun with them; be adventurous; try new and different paths; take a few interesting side trips; and pave new roads each and every time!



Work Teams

As described in Section 4 of the manual, your Work Teams are the ultimate “itinerary masters” in your Planetree journey. Work Teams are longer-term groups that concentrate on specific areas such as Service, Complementary Medicine, Spirituality, etc. They conduct research, develop policies and procedures, design implementation plans and do all the background work necessary for implementing programs and services and other activities in your organization. The Work Teams develop the “itineraries” of your excursions — they do not implement them (that’s where your Staff Action Committees come in).

Recruitment of Work Team Leaders

The success of your Work Teams will depend greatly upon the leaders selected for them. As with any team, department or committee, a strong leader will guide the group to strong results. It is very important to carefully select the right leaders for your Work Teams who have the following:

- organizational skills;
- meeting management skills;
- open-mindedness;
- the ability to achieve focus;
- the ability to lead the group to solid results time and time again;
- a demonstrated understanding of and commitment to the Planetree philosophy and model of care;
- a desire for “adventure;”
- caring, compassion, enthusiasm and a sense of humor!

It is strongly recommended that your Steering Committee selects the leader for each Work Team that is formed. This person may or may not be a member of the Steering Committee, however, as described in the Work Team Roles and Responsibilities document (see Section 7), a member of the Steering Committee should sit on each Work Team to serve as a liaison between the two groups.

Training of Work Team Leaders

Now that you have selected your Work Team leaders with the necessary characteristics and skills, you need to provide some additional training and guidance to start them off on the right track. A formal, structured training session is a great way to accomplish this. This session does not have to be long (a few hours), however, it should address the following:

- a review of the Planetree mission and components;
- a review of your Steering Committee charter (see Section 7 of this manual);
- a review and thorough discussion of your Work Team roles and responsibilities (see Section 7 of this manual);
- a review of your specific Planetree structure (Steering Committee members, Work Teams in place and members of each, Staff Action Committee coordinators, etc.);
- a review and discussion of the Staff Action Committee roles and responsibilities (see Section 7 of this manual);
- a review of your communication flowsheet (Section 17 of the manual, Lessons Learned and Best Practices,

- includes an example of a communication flowsheet);
- meeting management skills and tools;
 - a review and discussion of the first Work Team meeting.

The following is an example Work Team Leader orientation session:

Planetree Work Team Leader Orientation Agenda

- A. Introductions
- B. Purpose of Orientation
- C. Review
 - Planetree Mission and Components
 - Structure — Steering Committee, Work Teams, Staff Action Committees
- D. Definition of a work team
- E. Steps work team will take:
 - Define purpose/focus — assessment form
 - Define initial outcomes and timelines
 - Explore existing resources and identify budget
 - Develop communication and implementation plan
 - Develop a plan for evaluation of determined outcomes
- F. Communication:
 - With Steering Committee
 - With Staff Action Committees
- G. Where do we go from here?
- H. Tools
- I. Close



First Work Team Meeting

Similar to the initial Steering Committee meeting (Section 8), the first Work Team meeting needs to set the course for the team's journey. An effective agenda for this meeting should include:

1. Review of Steering Committee Charter
2. Review of Work Team Roles and Responsibilities
3. Review of Staff Action Committee Roles and Responsibilities
4. Review of Communication Flowsheet
5. Development of Work Team Purpose Statement
6. Review and Discussion of Work Team's Initial Assignment
7. Agreement of the Work Team Meeting Schedule

1. Review of the Steering Committee Charter

The working relationships between the Steering Committee, the Work Teams and the Staff Action Committees can become blurred and confusing unless each group works within their respective roles and responsibilities. It is important that the Work Team members understand your organization's Planetree structure and the Steering Committee's roles and responsibilities.

A brief review of the Steering Committee charter at your first Work Team meeting should accomplish this (and periodic re-reviews are helpful).

2. Review of Work Team Roles and Responsibilities

It is essential the Work Team fully understands its roles and responsibilities. Section 7 of this manual provides an example of this document. Your Work Team needs to have a thorough discussion of this at the first meeting.

3. Review of Staff Action Committee Roles and Responsibilities

Equally important to understanding the Work Team's roles and responsibilities, is understanding the roles and responsibilities of the Staff Action Committees. There is an important distinction between these two groups that needs to be reviewed and discussed. Work Teams primarily research and develop the necessary documents and tools for initiatives; Staff Action Committees, as the name indicates, puts things into action.

4. Review of Communication Flowsheet

This tool is incredibly useful in showing the working relationship and communication flow between the Steering Committee, the Work Teams and the Staff Action Committees. It is strongly recommended you develop such a tool for your organization — you will find that you will refer to it time and time again.

5. Development of Work Team Purpose Statement

What may seem basic and implied as the fundamental purpose of the Work Team may not be clear and/or agreed to by all members. Taking some time to discuss and develop a Work Team purpose statement at your first meeting will lay the foundation for all subsequent meetings and activities.

6. Review and Discussion of Work Team's Initial Assignment

When the Steering Committee approves the formation of each Work Team, identifies the members and selects a leader, it also will discuss and finalize an initial assignment worksheet (an example of this worksheet is in Section 7 of this manual). Your Work Team should review and discuss this initial assignment at its first meeting.

7. Agreement of the Work Team Meeting Schedule

Fundamental but absolutely necessary! A regular, set-in-advance meeting schedule will assure attendance and continued momentum and success of your Work Team.

Your first Work Team meeting has just ended quite successfully. Congratulations! You're ready for take-off!



PLANETREE



Staff Action Committees

In Section 4 of this manual, Structure Identification and Formation, we described the Staff Action Committees as your “tour guides,” the groups where “the rubber meets the road.” This is, indeed, the case. The Staff Action Committees take action and implement new services, initiatives and positive changes, and help to solve problems in their respective departments or clinics (depending on your medical group structure).

As with the Work Teams, it is equally essential for the Staff Action Committees to be led by trained and effective individuals (Staff Action Committee Coordinators); and to fully understand the roles and responsibilities of the Steering Committee, the Work Teams and the Staff Action Committees. The remainder of this section addresses the recruitment and training of the SAC coordinators, recruitment of SAC members, the first SAC meeting, and the importance of regular SAC coordinator meetings.

Recruitment of SAC Coordinators

It is strongly recommended that your Staff Action Committee Coordinator selection process be specifically outlined in your SAC roles and responsibilities document (Section 7 of this manual contains a sample of this document). The success of your Planetree journey will rely heavily on the success of your Staff Action Committees. Culture transitions can only occur when every employee, every department, every clinic is engaged. The Staff Action Committees are “vehicles” needed to accomplish this culture engagement. **The importance of the Staff Action Committees cannot be emphasized enough!** With that said, your SAC Coordinators serve an essential role and need to demonstrate the same characteristics and have the same skills as your Work Team leaders:

- organizational skills;
- meeting management skills;
- open-mindedness;
- the ability to achieve focus;
- the ability to lead the group to solid results time and time again;
- a demonstrated understanding of a commitment to the Planetree philosophy and model of care;
- a desire for “adventure”;
- caring, compassion, enthusiasm and a sense of humor!

Your SAC Coordinator selection process should include some aspect of management approval to assure the individuals selected demonstrate the skills and characteristics outlined.

Training of SAC Coordinators

The training of your SAC Coordinators is similar to that of the Work Team leaders. The advantage of holding these training sessions separately (Work Team leader training and SAC Coordinator training) is to allow for more focus and discussion on either the Work Team roles and responsibilities or the SAC roles and responsibilities. Separate sessions also allow for effective networking among SAC Coordinators or Work Team leaders. The SAC Coordinator training session does not have to be long (a few hours), however, it should address the following:

- a review of the Planetree mission and components;
- a review of your Steering Committee charter (see Section 7 of this manual);
- a review and discussion of your Work Team roles and responsibilities (see Section 7 of this manual);
- a review of your specific Planetree structure (Steering Committee members, Work Teams in place and members of each, Staff Action Committee Coordinators, etc.);
- a review and thorough discussion of the Staff Action Committee roles and responsibilities (see Section 7 of this manual);
- a review of your communication flowsheet (Section 17 of the manual, Lessons Learned and Best Practices, includes an example of a communication flowsheet);
- meeting management skills and tools;
- a discussion and design of the first SAC meeting.

The following includes a sample agenda and description of a SAC Coordinator training session.

Planetree Staff Action Coordinator Training Agenda

The P.O.A. (Plan of Action)

1. Welcome

2. The Mission

- Understanding the Planetree structure and how the Staff Action Committees fit in the overall concept of Planetree
- Running Staff Action Meetings – tips on preparation in running effective meetings
- Designing meeting agendas, ground rules, meeting roles, handling meeting challenges, dealing with conflict.

3. The Guidelines

Review Staff Action Committee Roles

4. The Tools

Interactive exercises to assist the new Coordinators in writing agendas, running the meetings, creating involvement and excitement, identifying and prioritizing goals and objectives, and identifying best practices for building partnerships with the department leadership, the Work Teams and the Steering Committee.

5. The Next Steps

Planning worksheet to assist in the organization and involvement of others in their Planetree projects.



PLANETREE



A best practice to consider is having each SAC Coordinator's respective manager attend this training session as well. This will go a long way in developing a supportive relationship between the manager and their Staff Action Committee.

Because your SAC Coordinators may change every year or every few years, you will need to hold SAC Coordinator training every year. Another best practice is to require all SAC Coordinators and their managers to attend this training every year — regardless if they've attended previously. The experience of your "seasoned" SAC coordinators should be shared by them at your training sessions. This is an excellent learning process for your new SAC Coordinators and provides important links and partnerships for them. The same holds true for the managers — they should share their own experiences and recommendations as to their supportive roles to the staff Action Committees and SAC Coordinators. Every meeting, every training session, every interaction the SAC Coordinators, Work Team leaders and managers have with each other only strengthens your efforts to transform your culture to the Planetree philosophy and model of care.

Recruitment of Staff Action Committee Members

The number of Staff Action Committee members and mix of individuals is dependent upon your clinic or department size and needs. You may choose to recruit a designated group of individuals or hold open meetings where anyone is encouraged to and may attend. Section 7 of this manual includes an example document on the Purpose, Membership and Responsibilities for Staff Action Committees. Section 17, Lessons Learned and Best Practices, includes a sample recruitment poster for Staff Action Committee members. Be creative with your SAC member selection and be inclusive. Your Planetree journey will be detoured and dead-ended if your employees do not feel welcome and involved. **The importance of the Staff Action Committees cannot be emphasized enough!**

First Staff Action Committee Meeting

And you're off! Your Staff Action Committee Coordinators are trained and prepared to take your clinics and departments on some great excursion. Of course, the creativity of your Work Teams and Staff Action Committees will define those excursions and the Staff Action Committees, for the most part, will guide your clinics and departments on these many adventures. You need to assure they are well outfitted. This is accomplished in their meetings, and the first Staff Action Committee meeting is as critical as those of the Steering Committee and the Work Teams.

In your Staff Action Committee Coordinator training, you discuss and design the first SAC meeting. Taking the time to do this in the training session will provide your SAC Coordinator with the needed structure, content and confidence to lead that first meeting. Your clinic or department needs will vary and this, too, may vary some of the focus of your SAC meetings. The first meeting, however, should contain some of the same agenda items as the first Steering Committee and Work Team meetings:

1. Review of Steering Committee Charter
2. Review of Work Team Roles and Responsibilities
3. Review and Discussion of Staff Action Committee Roles and Responsibilities
4. Review and Discussion of Communication Flowchart
5. Discussion of Possible SAC Focus Areas
6. Agreement of SAC Meeting Schedule

1. Review of Steering Committee Charter

The working relationships between the Steering Committee, the Work Teams and the Staff Action Committees can become blurred and confusing unless each group works within their respective roles and responsibilities. It is important that the SAC members understand your organization's Planetree structure and the Steering Committee's roles and responsibilities. A brief review of the Steering Committee charter at your first SAC meeting should accomplish this (and periodic re-reviews are helpful).

2. Review of Work Team Roles and Responsibilities

It is important for your Staff Action Committees to understand the roles and responsibilities of the Work Teams. There is an important distinction between these two groups that needs to be reviewed and discussed. Work Teams primarily research and develop the necessary documents and tools for initiatives; Staff Action Committees, as the name indicates, puts things into action.

3. Review and Discussion of Staff Action Committee Roles and Responsibilities

It is essential the Staff Action Committee fully understands its roles and responsibilities. Section 7 of this manual provides an example of this document. Your Staff Action Committee needs to have a thorough discussion of this at the first meeting.

4. Review and Discussion of Communication Flowsheet

This tool is incredibly useful in showing the working relationship and communication flow between the Steering Committee, the Work Teams and the Staff Action Committees. It is strongly recommended you develop such a tool for your organization – you will find that you refer to it time and time again.

5. Discussion of Possible SAC Focus Areas

This is the perfect opportunity to have a brief review and discussion of the Planetree components. This exercise will begin to spark ideas on areas your SAC members will want to focus. Your subsequent SAC meetings will further identify projects and initiatives.

6. Agreement of SAC Meeting Schedule

As with the Steering Committee and Work Teams, this fundamental item is essential! A regular, set-in-advance meeting schedule will assure attendance and continued momentum and success of your Staff Action Committee.

You did it! Your Staff Action Committees are full of fuel and underway in their Planetree journey. Enjoy the ride!

Regular Staff Action Committee Coordinator Meetings

More than likely, your SAC Coordinators are not managers or supervisors and don't have the experience to run meetings, handle difficult conversations or manage negativity. The initial SAC Coordinator training gives them a good start. A best practice is to hold regular SAC Coordinator meetings that serve as a necessary refueling stop for your Coordinators. You may opt to vary the focus of each meeting (e.g. a review of the Planetree components, a discussion of the working relationship between the Work Teams and Staff Action Committees), however, every meeting should allow for success sharing and problem solving. Our SAC Coordinators are now refueled and ready to lead their members on more exiting excursions!



Lessons Learned and Best Practices

The purpose of this section is to acknowledge that even the best laid travel plans can have some bumps in the road — and your Planetree journey is no different. You discover, as you progress along your journey, better ways to plan, communicate and travel. And you will implement your better ways around the next corner of your journey. The following lessons learned and best practices will give you a good start but are by no means inclusive. As you discover your own lessons and find your own better ways, share them with the other Planetree affiliates – it will make everyone’s journey that much more rewarding and successful.

Lessons Learned

1. Never attempt to begin your journey unless your organization’s leadership is fully committed to and knowledgeable of the Planetree philosophy and model of care.
2. Absolutely, positively develop your Planetree Steering Committee Charter, Work Team Roles and Responsibilities Document, and Staff Action Committee Roles and Responsibilities Document.
3. And absolutely, positively educate, educate, educate every group on all three.
4. If you skip these first three lessons you will end up with confusion and role ambiguity — and your journey will be short-lived.
5. Choose your Work Team leaders carefully. They will make the difference between an effective and ineffective Work Team.
6. Have your Champion attend the initial Work Team meetings to help you set sail!
7. Choose your retreat facilitators carefully and train them.
8. Design your retreats so they are interactive, fun and provide participants with tangible take-aways.
9. Your Steering Committee should never hesitate to intervene if a Work Team or Staff Action Committee needs directions, takes a detour and travels down an unfavorable path, or reaches an impasse with a manager.
10. Leave your organizational title, status or any other hierarchical designation at the door of your various Planetree meetings. All voices and ideas need to be heard with no fear of ridicule or repercussions.
11. Staff Action Committee Coordinators and members should be staff employees — not managers.
12. Train your Work Team leaders and Staff Action Committee Coordinators.
13. Require your Staff Action Committee Coordinators to attend training every year — regardless of the number of years they serve in this role.
14. Require the SAC Coordinators’ respective managers to attend this training as well.
15. Your Planetree champion should attend a meeting of each Staff Action Committee on a periodic basis.
16. Encourage as much participation at all levels (e.g. SAC members and Coordinators, Work Team members and leaders, retreat facilitators).
17. Be creative in achieving physician engagement.
18. Above all else, be patient. Your Planetree journey is never-ending.

Best Practices

1. Develop a communication flowsheet (example follows).
2. Develop some type of communication form between the Work Teams and Staff Action Committees (example called, Planetree Possibilities, follows).
3. Develop a newsletter to celebrate your travels (example follows).
4. Centrally capture Planetree happenings throughout the year to “log” your journey’s fantastic excursions.
5. Be creative in recruiting Staff Action Committee members (example follows).
6. Hold regular Staff Action Committee Coordinator meetings (with their respective managers).
Make the meetings fun.
7. Develop a resource binder for your Work Team leaders and Staff Action Committee Coordinators.
8. Design a retreat facilitator certification program.
9. Develop a physician CME program.



PLANETREE COMMUNICATION STRATEGY AMG – NORTH REGION

Communication initiated from a work team:

WORK TEAM
Initiates a "Planetree Possibilities" form outlining the information being requested from the Staff Action Committee



STAFF ACTION COMMITTEE
SAC coordinator brings the "Planetree Possibilities" form to the Staff Action meeting. Discussion points are captured on the form, and it is returned to the respective work team



WORK TEAM
Compiles "Planetree Possibilities" information from Staff Action Committees. Uses data to develop and implement a new service or initiative. Makes recommendations to Steering Committee; Keeps Steering Committee informed

STEERING COMMITTEE
Information and recommendations regarding Work Team projects are presented



STAFF ACTION COMMITTEE
Staff Action Committee identifies and/or receives ideas and recommendations for their respective site. Ideas and recommendations are shared with the respective Site Manager



SITE MANAGER
Assists Staff Action Committee in identifying and resolving issues and ideas for the betterment of the clinic



from a Staff Action Committee:



Planetree Possibilities



PLANETREE

Work Team:

Mission:

Circle 1 of the following:

Gather information

Gather information/make recommendations

Gather information & take action

BASED ON TODAY'S MEETING DISCUSSION, THESE ARE OUR PLANETREE POSSIBILITIES...

Please return to your team representative by:



Branching Out

Aurora Medical Group - Planetree Newsletter

North Region
Q4 2004



Aurora Medical Group's Planetree Happenings

- DePere held an employee massage day. 15 minute massages were offered for a minimal fee. All money collected went to their Planetree fund.
- DePere has implemented an employee birthday club. Kids who come to the clinic have an opportunity to color the birthday banner.....the kids also leave little messages for the birthday person. DePere has also worked on "Adopt a Highway" and proper recycling.
- Womens Center held a drawing with all donated packages for the American Heart Association Heartwalk fundraiser and did a month long promotion for raising funds for supporting education and research for heart health for women. Eighteen walkers from the floor represented AMG-Women's Center. The group raised \$1163.00 that was donated to the American Heart Association.
- Privacy screens were purchased for nursing moms at the Women's Center. There is a set on each wing for patients to use. The group also placed laminated nature scene posters on the ceilings above patient procedure tables and installed diaper changing stations in each pod for patients to use.
- Sturgeon Bay has added a Sunshine Club. Each employee donates \$.50-\$1.00 each month for the purchase of cards or flowers for fellow associates who are going through difficult times. They are also continuing their "theme" pot lucks.
- The Willows has purchased a TV/DISH network for their waiting room which broadcasts "news" shows such as CNN and MSNBC. An updated selection of magazines has also been added to the waiting area.
- AMG ABHC held a silent auction. With their proceeds, they will purchase a rocking chair for the Peds area and a fainting chair for the lab.

Remaining Annual Planetree Retreat Dates:

- November 23rd (pm)
- December 3rd (am & pm)
- December 13th (am)
- December 16th (am)

Initial Planetree Retreat Dates:

- December 7th
- January 11th
- February 18th
- March 23rd
- April 25th
- May 12th





Laura Gilpin visits ABMC

Laura Gilpin, M.F.A., R.N., has been involved with Planetree since 1985 when she was a staff nurse on the original Planetree Unit in San Francisco and served as the first Education and Arts Coordinator. As Director of the Planetree Alliance, she serves as a resource to all Planetree affiliates.

Laura met with Staff Action Coordinators on Thursday, October 28th. Each Coordinator shared what their SAC committees were doing and Laura shared her insight on both successes and challenges of each group. It was great to hear all the wonderful "Planetree" happenings. Laura inspired all of us with her positive attitude!!



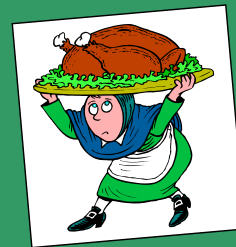
A New Planetree Face:

Hi, I'm Christine Schultz-Adams. I joined the Aurora team on August 30th as an Employee and Organizational Development Specialist and Planetree Coordinator. As part of my role I attend Steering Committee, Work Team and Staff Action Meetings as well as facilitate both Initial and Annual retreats. My goal for 2005 is to support you...as we continue the Planetree journey. Please feel free to contact me at 288-5230 or via e-mail.

Holiday Brain Teasers:

F	T	U	R	K	E	Y	W	G	M
A	V	T	S	E	V	R	A	H	S
M	P	U	M	P	K	I	N	P	F
I	N	D	I	A	N	S	A	I	L
L	R	V	R	C	S	D	O	E	T
Y	O	K	G	K	K	C	R	O	I
K	C	O	L	O	N	Y	C	B	S
X	N	O	I	F	A	L	L	V	Z
S	R	C	P	J	H	I	J	P	V
N	S	U	W	F	T	S	A	E	F

COLONY
 COOK
 CORN
 FALL
 FAMILY
 FEAST
 HARVEST
 INDIANS
 PIE
 PILGRIMS
 PUMPKIN
 SAIL
 THANKS
 TURKEY





PLANETREE



WANTED

LOOKING FOR A PLANETREE



STAFF ACTION COORDINATOR

ROLE INCLUDES:

GROUP FACILITATOR FOR THE CLINIC STAFF AUTHORIZED TO MAKE DECISIONS, SOLVE PROBLEMS AND GENERATE IDEAS TO BE IMPLEMENTED. SERVES AS THE "LIASON" BETWEEN PLANETREE STEERING COMMITTEE AND WORK TEAMS. RESPONSIBLE FOR SETTING MEETING TIMES AND LOCATIONS; ESTABLISHING AGENDAS; AND ENSURING THAT GROUP ACTIONS AND DECISIONS ARE RECORDED AND DISTRIBUTED. QUALIFICATIONS INCLUDE: ENERGETIC, ENTHUSIASTIC, TEAM PLAYER, WILLING TO LEARN. CONTACT SITE MANAGER IF YOU ARE INTERESTED. OR FOR MORE INFORMATION - BY NOVEMBER 19TH



PLANETREE

Map Key

Planetree

The tree under which Hippocrates sat. The non-profit membership organization working with hospitals and health centers to develop and implement patient-centered care in healing environments.

Planetree Affiliates

The membership organizations of Planetree.

Components/Tenets

The core principles of the Planetree philosophy and model of care.

Champions

The identified administrative and physician leaders who drive your organization's Planetree cultural transition.

Steering Committee

The oversight group that leads the organization's Planetree journey.

Work Team

The longer-term, topic-focused groups that conduct initiative research, develop initiative policies and procedures, and develop initiative resources.

Staff Action Committee (SAC)

The site- or department-based staff committees that implement Work Team initiatives and develop and implement site- or department-based initiatives.

Staff Action Coordinator

The individual(s) who lead your Staff Action Committees.

P.H.D. of Health Care

The Planetree philosophy and model of care that Personalizes, Humanizes and Demystifies Health Care.

Planetree Moments

The activities and interactions that occur each and every day in your organization that exemplify the Planetree philosophy and model of care.

Caregiver

Everyone.

Provider

Physicians and mid-level practitioners (nurse practitioner, physician assistant, etc.).



PLANETREE



Planetree Navigation

Planetree Website:

www.Planetree.org

Planetree Mission:

Serving as a catalyst and partner in the development and implementation of models of health care that:

- cultivate healing of mind-body-spirit;
- are patient-centered,
- value-based,
- holistic,
- and support the safety of patients through active involvement in their own care.

Planetree Components:

Human Interactions

Planetree is about human beings caring for and serving other human beings. This involves not only the provision of nurturing, compassionate, personalized care to patients and families, but just as important, how staff care for themselves and each other; and, how organizations create cultures which support and nurture their staffs. Experiential staff retreats sensitize staff to the anatomy of a hospital experience from the patient's perspective and better enable them to holistically serve the patient. Healing partnerships between patients, family members and caregivers are encouraged by a care model which enables patients to be active participants in their health care.

Architectural and Interior Design Conducive to Health and Healing

Architectural Design Conducive to Health and Healing Planetree firmly believes that the physical environment is vital to the healing process of the patient. Facility design should include efficient layouts which support patient dignity and personhood. Domestic aesthetics, art and warm home-like, non-institutional designs which value humans, not just technology, are emphasized. Architectural barriers which inhibit patient control and privacy as well as interfere with family participation are removed. Awareness of the symbolic messages communicated by design is essential.

Designing and maintaining an uncluttered environment encourages patient mobility and a sense of "safe shelter." The design of a Planetree facility provides patients and families with spaces for both solitude and social activities, and includes libraries, kitchens, lounges, activity rooms, chapels, and gardens. Comfortable space and accommodations are provided for families to stay overnight. Healing gardens, fountains, fish tanks and waterfalls are provided to connect patients, families and staff with the relaxing, invigorating, healing, and meditative aspects of nature.

It is just as essential to create healing environments for the staff as it is for patients. Physicians, nurses and ancillary staff are very much affected by their working environment. It is very hard to help patients heal and recover in inhospitable, cold and impersonal spaces. Lounges and sacred space for staff are an important component in the creation of a healing environment.



The Importance of the Nutritional and Nurturing Aspects of Food

Nutrition is recognized as an integral part of health and healing essential not only for good health, but as a source of pleasure, comfort and familiarity. With all the scientific data demonstrating the role of nutrition in health and disease, health care facilities have a responsibility to be role models for delicious, healthy eating. This can be accomplished by making low-fat entree selections available in the cafeteria, as well as healthy choices in vending machines. Kitchens on the floor encourage families to prepare favorite foods or meals for their loved ones. They also serve as gathering places, much as they do in our homes, for patients and families, and thus help create spontaneous support groups.

Cooking demonstrations and classes are provided by nutritionists and volunteers. Nutrition education focuses on not only the patient's current illness but on healthy living for the whole family. Volunteer bakers bake breads, muffins and cookies to provide "aromatherapy", and to create a nurturing environment.

Empowering Patients Through Education and Information

Planetree's patient-centered model of care and consumer-sensitive healing approach is an idea whose time has truly come. In this era of health care consumerism, there is a rapidly expanding mass of educated and empowered consumers demanding more involvement in their health care. Planetree's model delivers!

The Model's emphasis on patient and family education is carried out through such strategies as customized information packets, collaborative care conferences and patient pathways. The open chart policy enables patients to read and write in their medical records. In the self-medication program patients who are able can keep their medications at the bedside and assume responsibility for their administration.

Planetree recognizes that the experience of illness has the potential to transform the patient. It can be a time of great personal growth for the patient as life goals and values are reevaluated, priorities are clarified, and inner resources are discovered. A variety of educational materials are made available to the patient, the family and the community through consumer-friendly health resource centers and satellite centers. The Planetree Classification System aids those in search of information as they review broad collections of medical texts and journals. Video and audio tapes, computer services and much more, support patient's increasing hunger for information about their health and medical care.

The Importance of Family, Friends, and Social Support

Social support has been shown to be vital to good health. An increasing number of medical and social researchers are finding that anything that promotes a sense of love and intimacy, connection and community is healing. Planetree supports and encourages involvement of family and significant others whenever possible. The Care Partner Program provides education and training to assist family participation in the care of patients while hospitalized and at home after discharge. As part of the health care team, significant others can make a valuable contribution to the quality of the patient's hospital experience. Volunteer care partners are available for those patients who are alone. One such program, the volunteer hand holding program, trains volunteers to accompany patients having minor surgery into the operating room to provide emotional support. Another element of the Planetree Model which assists families in being involved is unrestricted visiting hours, even in the ICU.



PLANETREE



Spirituality: The Importance of Inner Resources

Planetree recognizes the vital role of spirituality in healing the whole person. Supporting patients, families and staff in connecting with their own inner resources creates a more healing environment. Chapels, gardens and meditation rooms provide opportunities for reflection and prayer, and Chaplains are seen as vital members of the health care team.

The Importance of Human Touch

Touch is an essential way of communicating caring and is unfortunately often omitted from the clinical setting. Therapeutic full body or chair massage is available for patients, families and staff. Internship programs for massage therapists and training for volunteers to give hand and foot rubs are also available and help keep costs minimal. Families, as part of the Care Partner Program, can also be taught to give massages to loved ones while in the hospital and at home. Nurses, doctors and other staff find chair massage focusing on the neck, shoulders and back, a useful way to relieve stress and re-energize.

Healing Arts: Nutrition for the Soul

Music, storytellers, clowns, and funny movies create an atmosphere of serenity and playfulness in the Planetree Model. Artwork in patient rooms, treatment areas and on art carts add to the ambiance. Volunteers work with patients who would like to create their own art, while involvement from artists, musicians, poets and story tellers from the local community help to expand the boundaries of the health care facility.

Complementary Therapies

Complementary and alternative medical (CAM) therapy use and expenditures have increased substantially in the last decade. All data confirm this trend among consumers will continue to grow in the coming years. Some individuals choose these therapies because of dissatisfaction with conventional therapies, while others do so because they have found these health care alternatives to be more congruent with their own beliefs, values and philosophical orientations toward health and life. In either case, it is important to realize a growing number of patients are desiring treatment options which are more natural, less toxic, less invasive and holistic, to complement more conventional medical approaches.

Aromatherapy's calming effect on agitated patients is now being used during MRIs and with geropsychiatric patients. Pet therapy has also been successfully implemented in Planetree hospitals. A number of studies have shown that pets can have beneficial effects on health, including a lowered blood pressure, mood elevation and enhanced social interaction.

To meet the growing consumer demand for CAM therapies, Planetree affiliates have instituted heart disease reversal programs, mind/body medicine interventions such as meditation and healing guided imagery, therapeutic massage, therapeutic touch, Reiki, acupuncture, Tai Chi and yoga.

Healthy Communities

Expanding the boundaries of health care. Working with schools, senior centers, churches and other community partners, organizations are redefining health care to include the health and wellness of the larger community.

History

Planetree was founded in 1978 by a patient, Angelica Thieriot, after several traumatic hospital experiences. Her experience left her with mixed emotions — the high-tech environment was commendable, but the lack of personalized care during her stay was appalling.

Nurses hurried in and out of her room without becoming familiar with her as an individual, not to mention familiarizing themselves with her medical chart. She spent hours staring at blank walls, which left her feeling lonely and afraid.

After her discharge from the hospital, Thieriot decided to approach the chief of medicine to share her vision of a new type of hospital where patients get the support and healing on all levels. A place where individuals could learn more about healthcare and medicine in order to become active participants in their own care and well-being. She founded the Planetree organization, taking its name from the tree that Hippocrates sat under to teach the very first medical students in ancient Greece.

Her ideas were eventually accepted. Eventually, a planning and advisory board was formed under her direction. In 1985, with the same commitment of Hippocrates, Planetree was created. A 13-bed medical/surgical unit in a large San Francisco medical center became the first Planetree unit in the country.

Since then, Planetree has been an internationally recognized leader in pioneering patient-centered care. Planetree has received national recognition with feature articles in *Prevention Magazine*, *Healthcare Forum Journal*, *Hospital & Health Networks*, *Nursing Times*, *New York Times*, *The Quality Letter for Healthcare Leaders*, *Health Facilities Management*, *Trustee Magazine*, *JAMA*, and *Newsweek Japan*.

In over 100 health care settings throughout the U.S., Canada, and Europe we are demonstrating that patient-centered care is not only empowering as a philosophy, but viable, vital and cost effective as a practice. Our affiliate sites are currently operating in a variety of health care settings, with individual adaptations incorporated by each site to meet its unique needs. These affiliates range from small rural hospitals (25 beds) to large urban medical centers (2163 beds), and include acute and critical care, emergency departments, long term care, outpatient services, as well as ambulatory care and community health centers.

Planetree Overview

Since its founding in 1978 as a non-profit organization, Planetree has been a pioneer in personalizing, humanizing and demystifying the healthcare experience for patients and their families. The Planetree Model is patient-centered rather than provider-focused, and is committed to improving medical care from the patient's perspective. It empowers patients and families through information and education, and encourages "healing partnerships" with care givers.

Planetree's approach is holistic and encourages healing in all dimensions - mental, emotional, spiritual and social, as well as physical. It seeks to maximize health care outcomes by integrating optimal medical therapies. Access to arts and nature are also incorporated into the healing environment.

The Planetree Model recognizes the importance of architectural and interior design in the healing process. A growing body of scientific data points to improved patient outcomes and satisfaction as a result of design factors which are home-like, barrier free, support patient dignity and encourage family participation in care. Facility designs utilizing Planetree's principles result in life-enhancing, healing environments.



PLANETREE



Books/Articles

Putting Patients First: This important volume explains the origins and uses of patient-centered care and provides a practical approach to implementing it in any health care organization. Step by step, the book clearly outlines the elements of the highly-successful Planetree patient-centered care model and includes the validating research. Available for purchase through www.Planetree.org.

“Restoration and the Healing Process”

Elsa Brenner. New York Times (Late Edition (east Coast)). New York, N.Y.:Aug 14, 2005. p. 3

Game

“In the Treehouse” (order form follows)

In The Treehouse Game

In The Treehouse is a multiplayer game that tests your knowledge about the Planetree philosophy and its components. By correctly identifying fact or fallacy of healthcare scenarios, you advance around the board. Over 20 questions, opportunity cards, die, game pieces, board, answer sheet and directions.

Quantity	Description	Price	Total
	In The Treehouse game	\$75.00 each	\$ _____

Ship To:

Organization Name: _____

Contact Name: _____

Phone Number: _____

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