“Ain’t No Stoppin’ Us Now”: 2018 NYS WIC Managers’ Workshop

November 14-16, 2018

Goal: To provide WIC LA and VMA managers with enhanced skills and tools that will reinforce excellence, reinvigorate them as leaders, and provide an opportunity for professional development.

Description: New York State WIC Programs are in the most exciting phase as we transition from WICSIS and paper checks to NYWIC and electronic benefits. This transition will excite, inspire and challenge WIC managers and their staff teams. This managers’ workshop is intended to bring new skills to the forefront on the transition to NYWIC, explore opportunities to improve caseload and retention, and share strategies and insights with colleagues.

Target Audience: WIC Coordinators, VMA Directors

Length of Training: 2 days

Modality: Face-to-Face

Learning Objectives:
As a result of this training, participants will be able to:

- Explore leadership strategies to assist in the transition to NYWIC
- Enhance their approach to communication and teamwork
- Utilize promising practices as they relate to caseload and retention
- Practice new supervisory approaches
- Explore clinic systems and Quality Assurance
- Develop insight and energy regarding leadership

Easing Down the Road to NYWIC: Lessons from the Field

Goal: To provide WIC Managers with implementation tips to successfully operationalize NYWIC and engage and motivate staff.

Description: The transition from WICSIS to NYWIC is one of the most exciting opportunities for WIC local agencies, participants, vendors and the community. This session will help attendees understand the role of the manager in the implementation and operationalizing of NYWIC. Local Agency Directors from the pilot and rollout sites and the Central Region will share strategies and lessons learned.

Target Audience:
WIC Coordinators, VMA Coordinators

Length of Training: 90 minutes

Modality: Face-to-Face

Learning Objectives:
As a result of this training, participants will be able to:

- Identify key management tasks that are essential in transitioning to NYWIC successfully

- Explore staff buy in, training, clinic flow and participant education opportunities
- List "lessons learned" from colleagues both in the pilot agencies and the early implementers
- Develop practical strategies for enhancing the transition to NYWIC for staff, participants and the community

Instructors: Michelle Gerka
Panel Members: Merilee Twardowski, Michelle Figuerado, Melissa Sacco, Katie Palmer, Cathy Valenty

Materials Needed:
- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers

Teaching Methodologies:
Lecturette, Panel Discussion

Outline:
I. Panel Discussion with local agency directors from the pilot sites and Central region sites – 60 minutes

Questions for the panel:
We are so pleased you have agreed to share your “lessons learned” regarding NYWIC. I’d like to keep us focused on the role of the director in easing this transition rather than some of the “nuts and bolts” of the NYWIC system.

- Let’s start by talking about how you prepared your staff for NYWIC. How did you communicate? Did you have additional planning meetings? Who were some of the key individuals you included in the planning? What went well? What would you have done differently?
- What strategies did you use to ensure that staff utilized the on-line modules? What was easy or hard about what you did?
- What role did your Super User play in training and orientation? Were there specific areas that staff needed more help or coaching?
- What were some of the activities you did as you came close to implementation? For staff? For participants? For your community?
- As you started implementation was there a need to cross train staff on new tasks? Add additional tasks? Change roles and responsibilities?
- What did you do to keep morale high and staff engaged during this process?
- What thoughts have you had, or have you tried as it relates to clinic flow? Changes you’ve made? Changes you are thinking about?
- Any thoughts on how you are handling or might handle Facilitated Groups and Issuing

benefits?

- If you could give your colleagues one “pearl” of advice about something they should consider as they implement NYWIC, what would it be?
- What DOH-provided resources did you find most helpful, in preparing for rollout?

II. Questions and comments from participants – 20 minutes
III. Summarizing, wrap up and closing – 10 minutes

NYWIC: The Super Bowl of Teamwork and Communication

Goal: To provide WIC managers with key concepts and strategies to build staff motivation and focus to successfully operationalize NYWIC.

Description: The role of the manager at the agency becomes the focus as the transition into NYWIC emerges. The session will focus on bringing NYWIC “on board” and the platinum communication and team work skills that the manager needs to leverage. Participants will examine key strategies essential for maximizing everyone’s role during this exciting and pivotal time.

Target Audience:
WIC Coordinators, VMA Coordinators

Length of Training: 75 minutes

Modality: Face-to-Face

Learning Objectives:
As a result of this training, participants will be able to:

- Examine the role of the manager as it relates to communication and teamwork
- Differentiate the role of the manager with motivated vs unmotivated staff
- Discuss key communication strategies
- Analyze how to create a positive culture of staff interdependency

Instructors: Eric Reyes, Melanie Steilen, Gricel Arredondo

Materials Needed:

- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers

Teaching Methodologies:
Lecturette, discussion

Outline:

I. Welcome and Warm-Up - 5 minutes
II. Lecture on the role of the manager in creating a culture of teamwork - 10 minutes
III. Small group exercise: Characteristics of motivated staff vs unmotivated staff; Imagine what "your work" would be like if staff are motivated; Imagine what "your work" would be like if your staff are not motivated. Table discussions with worksheets - 20 minutes
IV. Lecture on factors that build a motivated staff - 10 minutes
V. Examining communication from two perspectives: Communication that is information and communication that is strategic to build staff interdependence to be part of a bigger outcome. Small group activity - 20 minutes
VI. Summarizing concepts about the role of the leader as it relates to communication and teamwork - 10 minutes

Caseload and Retention: Finding the Perfect Balance

Goal: To examine the many aspects of caseload and retention from the 2017 Learning Community and identify promising practices for Local Agencies.

Description: Over the past several years, the discussion about the importance of examining caseload and retention has become more important to WIC Local Agencies and VMAs. This session will give participants an opportunity to learn about the 2017 Learning Community and its findings, hear from their colleagues about the work their local agencies implemented and discuss some of the national efforts regarding caseload and retention.

Target Audience:
WIC Coordinators, VMA Coordinators

Length of Training: 90 minutes

Modality: Face-to-Face

Learning Objectives:
As a result of this training, participants will be able to:

- Review the findings of the 2017 Learning Community and the data tools that were utilized
- List promising practices from Local Agencies related to using data, reminder systems, managing no-show information, the grocery store experience and engaging staff teams
- Explore some of the successes and challenges for Local Agencies in sustaining this effort
- Discuss some of the national efforts regarding retention as coordinated by the National WIC Association

Instructors: Michelle Gerka, Meredith Jones, Elisabet Eppes
Panel Members: Juliet Campbell, Michelle Hall, Corie Nadzan

Materials Needed:

- Laptop
- Projector

- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers

Teaching Methodologies:
Lecturette, group discussion, panel

Outline:

I. Overview of the Learning Community and what we tried to accomplish - 10 minutes
II. Review of the data and the clinical tools we developed - 10 minutes
III. Interview with Panel from the Learning Community- 40 minutes
   a. There is no doubt we all learned a lot and did great work. I would like to zero in on some promising practices or lessons learned that your agency has implemented successfully since the Learning Community:
      1) From your perspective, what were some of the most significant lessons learned and how has that made an impact on caseload and/ or retention?
      2) What do you think are the promising practices we should highlight for our colleagues here today?
      3) How did you use data with your staff to motivate and engage them?
      4) What were some of the biggest barriers or challenges that you had to overcome?
      5) What did you do to build staff buy in to make some changes in the "way they do business'?
      6) What's your greatest accomplishment?

IV. Update from the National WIC Association by Elisabet Eppes about national retention efforts - 20 minutes
V. Questions and answers – 10 minutes

Maximizing Your Training Resources: WIC Training Center Activities

Goal: To highlight the available training center resources: online, face-to-face, live and archived webinars and review LA/VMA specific data.

Description: This session is designed to remind managers of the many available resources the WIC Training Center has to offer. CAI will highlight the face-to-face trainings, e-Learning courses, upcoming, and archived webinars available to all LA and VMA staff. CAI will distribute training reports from October 1, 2017-September 30, 2018 so each Local Agency and Vendor Management Agency can review what their staff has attended and viewed over the last year. Managers will have an opportunity to look at their agency data and think of ways to maximize these resources available for them and their staff.

Target Audience:
WIC Coordinators, VMA Coordinators

Length of Training: 45 minutes

Modality: Face-to-Face

Learning Objectives:
As a result of this training, participants will be able to:

- List the available resources the Training Center has to offer
- Review personalized agency reports
- Think about ways to maximize resources offered

Instructors: Michelle Gerka, Kelley King

Materials Needed:

- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers
- Personalized Agency Training Reports
- Worksheet

Teaching Methodologies:
Lecturette, large and small group discussion, individual activity

Outline:

I. Welcome and Introductions (5 minutes)
II. Review Previous Year Statistics (15 minutes)
    a. Reporting period (10/1/17-9/30/18)
    b. Face-to-Face Trainings given in that time
        i. Total number attended of all LA's and VMA's
    c. E-Learning courses available at that time
        i. Total number attended of all LA's and VMA's
    d. Live and archived webinars available at that time
        i. Total number attended of all LA's and VMA's
III. Highlight upcoming offerings
    a. 2019 webinar topics
    b. Upcoming e-Learning courses
IV. Distribute Agency Specific Data Reports (20 minutes)
    a. Give each manager a chance to review the report
    b. Distribute handout
        1) As a manager, what does this data tell you?

        2) What were the surprises, if any?
        3) How has training helped you with gaps in staff competencies?

4) Share any thoughts about how you might utilize these training resources differently over the next year.

V. Closing and Questions (5 minutes)

BREAKOUT SESSIONS:

Utilizing Data to Improve Program Performance

Goal: Increase participant awareness and knowledge of effective methods for utilizing available data to identify quality gaps and conduct successful performance improvement projects to improve participant/program outcomes.

Description: Using a combination of small group work and didactic power point presentation, we will explore the rationale for investing in structures and processes to engage in performance improvement, identify data and other information available to assess quality gaps and monitor improvement, and discuss practical steps for creating structures and processes that improve quality.

Target Audience:
WIC Coordinators,

Length of Training: 90 minutes

Modality: Face-to-Face

Learning Objectives:
As a result of this training, participants will be able to:

- Describe why performance improvement assessments and strategies are critical
- Build a repository of potentially useful data and analysis strategies to explore
- Describe practical steps in developing and implementing a performance improvement plan

Instructors:

- Dawn Middleton, CAI Vice President Performance Management
- Kathy Patton, Local Agency WIC Director

Materials Needed:

- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers

Teaching Methodologies: Cross-Agency Small Group Reflection and Sharing and Didactic Power Point Presentation

Outline:

I. Introduction
   a. Trainer reviews session objectives
   b. Participants introduce themselves

II. Didactic Power Point Presentation
   a. Facilitator introduces concepts of performance improvement
      i. Quality Assurance (QA)
      ii. Continuous Quality Improvement (CQI)
      iii. Plan, Do, Study, Act (PDSA) Cycles
   b. Potential metrics for understanding and monitoring performance
      i. Caseload measures (enrolled, participating)
      ii. Retention measures (no show, check redemption)
      iii. Target vs. actual visits per day, hour, nutritionist FTE
   c. Methods for collecting or applying those metrics
      i. Process Mapping to improve steps in the delivery of WIC services
      ii. Cycle time or desk studies
      iii. Appointment scheduling systems analysis

III. Closing

Resources:

- The Health Care Data Guide: Learning from Data for Improvement, Provost, et al, 2011.
- The Improvement Guide, Langley et al, 2009.
- NYS WIC Program LACASA Guidance Manual
- Summary of Changes in the LACASA from FFY 2017 to FFY 2018
- The Quality Improvement Handbook, Second Edition, Bauer et al. 2006
- The Institute for Healthcare Improvement
- Quarterly Record Review Instructions

Now I'm a Supervisor---What do I do?

Goal: To provide new supervisors with an overview of the essential skills necessary to be effective in their day to day work with staff.

Description: Providing WIC and VMA staff with coaching, supervision and career development can be one of the most rewarding aspects of our jobs or it can be a nightmare. This workshop will focus on basic supervisory skills for new supervisors. Participants will explore what is supervision, how to create partnerships with staff to build skills, providing feedback and coaching and handling the transition from co-worker to supervisor.

Target Audience:
WIC Coordinators, VMA Coordinators

Length of Training: 90 minutes

Modality: Face-to-Face

Learning Objectives:
As a result of this training, participants will be able to:

- Define supervision and the skills associated with this role
- Explore attitudes about coaching, mentoring and feedback
- Develop skills in providing feedback and coaching

- Examine observation and monitoring as key aspects of supervision

Instructor: Gricel Arredondo

Materials Needed:
- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers

Teaching Methodologies:
Lecturette, group discussion

Outline:
I. Warm Up on the Role of Supervision – 10 minutes
II. Characteristics of an Effective/Non-Effective Supervisor – 15 minutes
III. Review of Essential Skills of Supervision -10 minutes
IV. Values Clarification Activity related to the "your role" as a Supervisor- 20 minutes
V. Small Group Activity on Coaching- 10 minutes
VI. Overview of Feedback- 10 minutes
VII. Practice Providing feedback- 10 minutes
VIII. Wrap Up and Closing- 5 minutes

Using Emotional Intelligence to Manage Conflict

Goal: To increase awareness of participants' own emotional intelligence that includes their ability to recognize and manage their own emotions in positive ways to relieve stress, communicate effectively, empathize with staff, and overcome challenges.

Description: Emotional Intelligence (also known as EQ) is the ability to recognize, understand and manage our own emotions while recognizing, understanding and influencing the emotions of others. In this training, Managers will have the opportunity to become familiar with EQ skills, identify their EI strengths and identify behaviors to strengthen their ability to manage.

Target Audience:
WIC Coordinators, VMA Coordinators

Length of Training: 1.5 Hours

Modality: Face-to-Face

Learning Objectives: As a result of this training, participants will be able to:
- Understand the biological basis of emotional intelligence
- Identify the benefits of strengthening one's own emotional intelligence
- Recognize the four emotional intelligence skills

- Identify their own emotional intelligence strengths and behaviors to strengthen skills

Instructors: Eric Reyes, LMSW

Materials Needed:
- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers

Teaching Methodologies:
Lecturette, group discussion

Outline:

Intro – (Welcome, intro to trainer) 10 min
- Include building off of Conflict Management with staff training from the year prior
- Last year was to identify our behaviors related to our assertiveness and cooperativeness (five conflict-handling modes) to manage conflict in WIC
- Trainer Intro
- Ask participants to complete assessment (not score it)
    - Inform group we will re-visit this
    - We will not collect this
    - Be as honest as possible

Icebreaker 15 min
- Large group brainstorm characteristics of “best boss” vs. “worst boss”, then feelings related to that boss and behaviors that may come as a result
- Process
    - Identify the importance of being in tuned to your emotions

Objectives, group agreement, parking lot 5 min

Anatomy of an Emotion 5 min
- What happens physiologically to produce an emotion
- Emotions “Hijack” the neo-cortex, the area of the brain responsible for logic, reason, rationale and decision making.

Define 5 min
- What is emotional intelligence – ability to recognize emotion in self and manage, ability to understand emotions in others and influence
- Benefits
    - Self[1]

[1] Slaski, M. and Cartwright, S. (2002), Health, performance and emotional intelligence: an exploratory study of retail managers. Stress and Health, 18: 63-68. doi:10.1002/smi.926

- Suffered less subjective stress
    - Better health/well-being
    - Better management performance
  - Employees[2]
    - Cooperation
    - Increased motivation
    - Increased productivity

EQ Skills 10 min

- Emotional Intelligence Domains and Competencies review and handout

Managing Vision 25 min

- Leader's behavior has much to do with how committed employees are toward the vision
- EI leaders knows that certain behaviors impact employee commitment.
- Share top ten reasons that people feel less committed to a vision
- Activity:
  - Assign each table a vision and ask the group to:
    - Identify an example of this
    - Identify an emotional intelligent response
    - Report out
- Process

EQ Scoring and Tips 10 min

- Revisit self-assessment
- Introduce Hogan Emotional Intelligence model
- Provide scoring handout
- Review tips
- Process

Closing and Evaluation 5 min

From Surviving to Thriving: Role of the WIC Manager in Creating a Healthy Workplace

Goal: The goal of this program is to increase WIC Directors' knowledge of the impact stress has on both themselves and staff and explore ways to create a healthier workplace

Description: This 90-minute workshop will explore steps to creating a healthy WIC workplace. Through interactive exercises and action planning participants will walk away with tools for both self-care and improving their workplace environment

Target Audience:
WIC Coordinators, VMA Coordinators

Length of Training: 90 mins

Modality: Face-to-Face

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[2] Pamela R. Johnson, Julie Indvik, (1999) "Organizational benefits of having emotionally intelligent managers and employees", Journal of Workplace Learning, Vol. 11 Issue: 3, pp.84-88, https://doi.org/10.1108/13665629910264226

Learning Objectives:
As a result of this training, participants will be able to:

- Explore stress in the workplace and contributing factors
- Discuss what is meant by a psychologically healthy workplace
- Name at least one way to promote self-care at work
- Develop a workplace and personal wellness plan

Instructors: Melanie Steilen RN,BSN,ACRN

Materials Needed:
- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers
- Speakers

Teaching Methodologies:
Interactive didactic, small and large group exercises, action plans

Outline:

I. Workplace Wellness 101
II. What is Stress? Lecturette, videoclips, self-administered survey (30 mins)
   a. Definition
   b. Wellness stats in the 24/7 world
   c. Digital Toxicity -Internet Addiction survey
   d. Information overload
   e. Relationship between stress and disease(absenteeism)
III. What is a Psychologically Healthy Workplace? Lecturette, Large group brainstorm, Carousel Activity (30 mins)
   a. Definition- APA “fosters employee health and well-being while enhancing organizational performance and productivity”.
   b. Benefits of a Psychologically Healthy Workplace for Staff and Managers
   c. Five categories
      i. Employee Involvement
      ii. Work-Life balance
      iii. Employee growth and development
      iv. Health and Safety
      v. Employee recognition
IV. Overarching Role of Communication
   a. Employees to management
   b. Management to employees

V. Workplace Wellness Large group brainstorm, small group exercise, Action plans (30 mins)
   a. Identifying ways to promote self-care in the workplace
   b. Imagine a Healthier Workplace

VI. Developing 2 Action Plans
   a. Nourishing wellness and self-care
   b. Introducing and promoting self-care at work.
   c. Identify other ways to create a healthy work environment

VII. Wrap up Q & A

Resources:

- American Psychological Association Center for Organizational Excellence; https://www.apaexcellence.org/resources/creatingahealthyworkplace/
- American Psychological Association-Stress In America 2016;
  - https://www.apa.org/news/press/releases/stress/2016/coping-with-change.PDF
- Unused Vacation time; http://www.braunconsulting.com/bcg/newsletters/winter2004/winter20044.html
- America Worktime; http://www.findarticles.com/p/articles/mi_m1282/is_n3_v44/ai_11882284
- Stress facts; http://www.findarticles.com/p/articles/mi_m1282/is_n3_v44/ai_11882284
- Carlson, R., *Don't Sweat the Small Stuff*. Hyperion Books. 1997.
- Luskin, F., Pelletier, K., *Stress Free for Good*. HarperSanFrancisco Books. 2005.
- Ruiz, D.M., *The Four Agreements*. Amber Allen Books. 1997.
- Seaward, B.L., *Achieving the Mind-Body-Spirit Connection*. Jones and Bartlett. 2005.
- Seaward B.L., *Quiet Mind, Fearless Heart. John Wiley & Sons*. 2005.
- Seaward, B.L., *Stressed is Desserts Spelled Backward*. Conari Press. 1999.
- Seaward, B.L., *The Art of Calm*. Health Communications, Inc. Deerfield Beach, FL, 1999.
- Tolle, E., *The Power of Now*. New World Library. 1999.

Supervising Employees with Challenging Behaviors

Goal: To strengthen directors' skills and confidence in addressing difficult employee behaviors

Description: Individuals with supervisory responsibilities often find themselves challenged by an array of difficult employee behaviors such as lack of initiative, slacking, chronic complaining, negativity and many others. Sometimes it can feel paralyzing knowing how to address the myriad issues that arise. This session will review the CALM model for addressing difficult employee behaviors. The CALM model will include tips for (1) pre-planning for difficult conversations, (2) using both factual and emotional feedback, (3) listening carefully to elicit underlying issues and needs and (4) managing one's way towards resolution. Attendees will also learn about the CUP technique, a technique for responding appropriately when difficult conversations are initiated by employees rather than supervisors.

Target Audience:
WIC Coordinators, VMA Coordinators

Length of Training: 90 minutes

Modality: Face-to-Face

Learning Objectives:

As a result of this training, participants will be able to:

- Identify their specific challenges in managing difficult employee behaviors and plan one strategy for addressing these
- Explain each step of the CALM model and identify 1-2 important strategies for each of the steps in the model
- Explain each step of the CUP model and identify 1-2 important strategies for each of the steps in the model
- Differentiate factual vs emotional feedback

Instructor: Todd Mohrmann

Materials Needed:

- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers

Teaching Methodologies:

- Interactive mini-lecture
- Small group activity

Outline:

I. Introduction
   A. Agenda review
   B. Participant sharing of most challenging employee behaviors

II. Reflecting on our own approaches to addressing difficult employee behaviors: Identifying typical pitfalls and planning for change

III. The C.A.L.M. model for addressing difficult employee behaviors
   A. **C**larify the real issue and plan the conversation
      1. Examining one's own contribution
      2. Identify specific behaviors as opposed to general attitudes
      3. Articulating impact of the problem
      4. Planning opening for the conversation and anticipating responses
   B. **A**ddressing the problem using constructive feedback
      1. Typical pitfalls
      2. Factual vs emotional feedback
      3. Tone of voice, word choice and body language

4. Facilitating feedback from others
5. Customizing feedback to the individual employee

C. **L**istening carefully to determine underlying issues and needs
1. Reflective listening/paraphrasing
2. Using questions appropriately

D. **M**anaging the way towards resolution
1. **I**dentifying each other's concerns/needs
2. Agreeing on a course of action
3. Planning follow-up

IV. The C.U.P. model for responding to difficult conversations initiated by employees

A. Show **C**oncern
1. Defusing tension
2. Using empathy

B. Demonstrate **U**nderstanding
1. Using questions
2. Paraphrasing

C. **P**roblem Solve
1. **I**dentifying each other's concerns/needs
2. Agreeing on a course of action
3. Planning follow-up

V. Application – Case scenarios

Resources:

- Bacal, R. (2000). *Dealing with difficult employees*. Madison, WI: CWL Publishing Enterprises.
- Fournies, F. (2007). *Why employees don't do what they're supposed to do … and what to do about it*. New York, NY: McGraw-Hill.
- Studer, Q. (2008). *Results that last*. Hoboken, NJ: John Wiley & Sons, Inc.

Staff Retention Isn't Enough: Exploring Strategies for Employee Engagement

Goal: To introduce WIC managers to the concept of employee engagement and explore opportunities to increase engagement within the agency.

Description: Employee engagement is a workplace approach resulting in the right conditions for all members of an organization to give of their best each day, committed to their organizational goals and values, motivated to contribute to the organization's success, with an enhanced sense of their own well-being. In this session, WIC managers will explore their role in creating an environment where staff can be fully engaged and do their best work. Participants will review current research related to employee engagement and discuss strategies to improve engagement on all levels.

Target Audience:
WIC Coordinators, VMA Coordinators

Length of Training:

Modality: Face-to-Face

Learning Objectives: As a result of this training, participants will be able to:

- Discuss the definition of Employee Engagement and its relevance to WIC
- Review the current research trends on employee engagement
- Discuss the differences between retention and engagement
- Develop strategies for improving engagement within their agency

Instructor: Michelle Gerka

Materials Needed:

- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers

Teaching Methodologies:
Lecturette, group discussion

Outline:

I. Define engagement and its relevance to the workforce in WIC – 15 minutes
II. Review the trends/research related to Employee Engagement – 15 minutes
    i. Results of Gallup Poll engagement survey
    ii. Where do Millennials "fit in"
    iii. Compassionate Leadership
    iv. Employee Feedback
    v. Work/Life Balance
III. Small group work on how this fits into Agency workforce – 20 minutes
IV. Strategies for Increasing Employee Engagement in the Workplace - 10 minutes
V. Case Study of an agency and small group work about strategies that might be used to increase employee engagement – 15 minutes
VI. Self-Assessment of their organization's ability to increase employee engagement - 10 minutes
VII. Wrap up and Next steps - 5 minutes

Why Was It Designed This Way? Can We Have a Do-Over?
WIC Program Appointment Scheduling Systems – Let's Think Twice

Goal: Increase participant awareness and knowledge of key concepts associated with developing and implementing efficient and effective WIC appointment scheduling systems

Description: Using a combination of small group work, didactic power point presentation, and peer case study, we will explore the origin of our WIC appointment scheduling systems, how we learned to schedule appointments, and review best and evidence-based practices for improving the efficiency and effectiveness of WIC appointment scheduling systems. This will include analysis of sample WIC program data and sharing of experiences of a WIC agency staff person who has collected and used data and information to streamline appointment time intervals and appointment scheduling criteria.

Target Audience:
WIC Coordinators,

Length of Training: 90 minutes

Modality: Face-to-Face

Learning Objectives:
As a result of this training, participants will be able to

- Examine rationale for streamlining appointment time intervals and scheduling criteria
- Analyze data to identify to determine average time in face-to-face contact with a nutritionist
- Describe 2-3 best practices in the development and implementation of a WIC agency appointment scheduling system

Instructors: Dawn Middleton, CAI Vice President Performance Management, and Amanda Wright

Materials Needed:

- Laptop
- Projector
- Projection screen
- PowerPoint slides
- Flipchart easel
- Newsprint
- Markers
- Worksheet – Standardizing Appointment Time Intervals
- Sample Streamlined Appointment Scheduling Criteria – Before and After

Teaching Methodologies: Cross-Agency Small Group Reflection and Sharing, and Didactic Power Point Presentation, Data Analysis, Peer Case Study

Outline:

- **Introduction**
  - Trainer reviews session objectives
  - Participants introduce themselves and one word to describe the process of making an appointment for a WIC participant at their agency sites
- **Where Did It All Start?**
  - Small Group Work: Facilitator places participants in groups of 3, across agencies
    - Trainer asks participants to consider:
      - How was your appointment schedule template and scheduling approach was developed?
      - How did they learn to schedule appointments?
  - Process and Report Out: facilitator asks participants to share what came up for them during their discussions in large group
- **Didactic Power Point Presentation**: facilitator introduces concepts of efficient and effective clinic systems and role of appointment scheduling systems

- **Exploring Reducing Appointment Time Intervals**: Participants review a worksheet that includes sample WIC program data describing time in face-to-face contact with the nutritionist for a typical day in a WIC clinic and are asked to calculate the average time in face-to-face contact with a nutritionist across all appointments to consider opportunities to streamline the number of appointment intervals they currently use in their appointment scheduling templates.
    - Trainer starts by asking participants to raise their hand if this applies to them:
        - Schedule has 1 appointment time interval
        - Schedule has 2 appointment time intervals
        - Schedule has 3 appointment time intervals
        - Schedule has 4 or more appointment time intervals
    - Trainer reflects on responses noting that there is a great deal of variation
    - Trainer provides instruction on how to complete the worksheet
        - Part 1: Data analysis
        - Part 2: Answer questions about use of data to streamline appointment scheduling intervals (e.g., short and long visit). What would be hard? Easy?
    - Each participant completes the worksheet alone
    - Small Group Discussion: participants share reflections on data derived from completed the worksheet in their small groups and key questions.
    - Process and Report Out: in large group trainer asks participants to share their reflections from completion of the worksheet and small group discussion.
- **Case Study:** WIC agency staff person shares their experience, as part of a WIC learning collaborative, in working with their team to identify average time in face-to-face contact with a nutritionist and how they used that data to propose new standardized intervals for appointments and streamline appointment scheduling criteria.
- **Question and Answer**: Participants can ask questions of presenter
- **Didactic Power Point Presentation**: Facilitator presents evidence-based and best practices for design and implementation of an appointment scheduling systems with a focus on:
    - Standardizing appointment interval length
    - Streamlining appointment scheduling criteria
- **Closing**: Facilitator shares tools that managers can use to go back to their sites and collect data about average time in face-to-face contact with nutritionist and provides instructions on how to use. Asks what are you taking away from this session? How can the WIC training center assist you?

Resources:

- Mastering Patient Flow, Using Lean Thinking to Improve Your Practice Operations, 3rd Edition, Elizabeth W. Woodcock, MBA, FACMPE, CPC, MGMA 2009, pages 127-240
- Institute for Healthcare Improvement, Reducing Schedule Complexity, accessed May 2018, http://www.ihi.org/resources/Pages/Changes/ReduceSchedulingComplexity.aspx
- 6 Ways to Schedule Patients Effectively and Efficiently, accessed May 2018, https://www.solutionreach.com/blog/how-to-schedule-patients-effectively?hs_amp=true
- 5 Experts Offer Their Top Appointment Scheduling Tips, accessed May 2018, https://gopractice.kareo.com/article/5-experts-offer-their-top-appointment-scheduling-tips
- 10 Scheduling Tips for the Healthcare Practices, accessed May 2018, https://www.remindercall.com/scheduling-tips/