CAPSTONE FOR NURSE LEADERS
Wagner/NYU 2009-2010

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Course Summary and Objectives

Capstone is learning in action. Part of the core curriculum of the Masters program at the Wagner School, it provides students with both a critical learning experience and an opportunity to perform public service. Over the course of an academic year, students work in teams to address challenges, solve problems and identify opportunities for a client organization. Students will design the approach, conduct the data collection and analysis, and present findings, both orally and in writing to the client.

In architecture, the capstone is the crowning piece of an arch, the center stone that holds the arch together, giving shape and strength. Wagner’s capstone program plays a similar role in building on students’ previous coursework and expertise, while also enhancing student learning on management issues, key process skills and research skills. Capstone requires students to interweave their learning in these areas, and to do so in real time, in an unpredictable, complex real world environment. Although divided into teams, the class will work as a learning community dedicated to the success of all projects.

This year projects have been selected prior to the first day of formal class.

The model for learning chosen by the professors is student ownership of the project with the client as customer and the professors as expert consultants to the student team.

Learning Objectives

Classroom discussion and team coaching (14 classroom sessions over two semesters) will focus on three major areas:

(1) Using an Evidence-Based Approach to Design and Implement a Management Intervention. This includes 6 steps:
   - Framing the question
   - Finding sources of information
   - Assessing the accuracy of the information
   - Assessing the applicability of the information
   - Assessing the actionability of the information
   - Determining whether the team has adequate information

(2) Managing the team in its relationships with an external client and other stakeholders. This includes:
   - Responding appropriately to client needs, requests and expectations
• Understanding how the client organization works and its prevailing culture
• Preparing Interim and Final Reports both oral and written for the client

(3) Functioning as a Member of a Client-facing consulting team. This includes:
• Managing communication between the team and the client
• Contributing effectively to the team
• Resolving internal team conflicts

Process Skills
Students should demonstrate the ability to: (1) carry out project management, (2) manage client relationships and (3) manage themselves as a team.

Skill Sets:
Students will demonstrate the ability to:
• Identify and carry out data collection methods appropriate to the project.
• Identify and carry out appropriate analytical methods for the project
• Situate their findings in the broader related literature
• Draw conclusions as warranted by their data.
• Communicate their work effectively both orally and in writing.

Course Requirements
The class will include presentations from the instructor and guest speakers, discussion and team meetings. Course requirements include:
• Enrollment both semesters
• Attendance and participation in class activities and team meetings
• Completion of assignments on time
• Participation in field work
• Participation in meetings with clients
• Participation in preparation and presentation of findings
• All team members do NOT have to be present in all activities and meetings, some of which, unlike class, may be subject to scheduling difficulties.

Evaluation Criteria
Final grades are assigned at the end of the second semester. Learners are graded as a team, as adjusted for individual performance. Learners are graded on:

• Work products/submitted assignments. Product and project management include deliverables—team charter, kick-off agenda, work plan, client contract, search strategy, research design, progress reports, interim client presentation, final work plan, literature and data collection, analysis and recommendations and timeliness.

• Client satisfaction, as determined by final written evaluation done by the client.
The team grade will be adjusted by individual performance that will include: participation in class and in team activities, peer evaluations and self reflection memo.

**Required Readings**


**Recommended Readings**


**Professor Availability**

Teams are encouraged to meet with the professor at least once a semester outside of class. During regular class time (when classes aren’t held) at New York Hospital; at other times at Wagner or at one of the NY/P sites.

### 3890-3891 CLASS SCHEDULE AND CLASS Assignments

<table>
<thead>
<tr>
<th>FALL</th>
<th>Class 1</th>
<th>September 8</th>
<th>Do class readings, in advance.</th>
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<tbody>
<tr>
<td>Class 2</td>
<td>September 15</td>
<td>Team charter due at noon.</td>
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<tr>
<td>Class 3</td>
<td>September 29</td>
<td>Kick-off meeting agenda due at noon. Draft outline of any proposed research study by 12 Noon on Sept 29.</td>
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<tr>
<td>Class 4</td>
<td>October 13</td>
<td>Draft contract/work plan by 5pm on Oct 13 noon.</td>
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<tr>
<td>Class 5</td>
<td>October 27</td>
<td>Revised contract and work plan by 5pm on Oct 20. Draft outline of search strategy, to include best practices, due Oct 20.</td>
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<tr>
<td>Class 6</td>
<td>November 10</td>
<td>Mid-Semester course evaluation</td>
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Class 7  November 24  Final draft client contract due.

Class 8  December 8  Final work plan due by 12 noon on Nov 25
Draft interim client presentation due 5pm Dec 4.
Meet with client by Dec 15.
Final signed client contract by Dec 22.
Peer and self reflection evaluations due Dec 22.

Student teams are expected to execute much of their work plan between December 15 and January 19, with five days off for holidays.

SPRING

Class 9  January 19  Team Book Report and progress reports.


Class 12  April 27  Course wrap-up and final evaluation

Weekly Assignments

Class 1  Course Overview  September 8

• Review of syllabus and course expectations
• Teams review where they are in specifying research questions.

Readings:  Block—Appendix and Chapter 18, Chapters 1-3
Rundall (in KDF) et al, Using Research Evidence, 3-16
Kovner, D’Aquila and Fine (in KDF), Introduction and 17-52
Sample capstone materials from 2008-9 (hand-out)

Class 2  Evidence-Based Management: An Approach  September 15

• Guest speakers from last year’s capstone teams (Brian and Joelle)
• Review six steps of evidence-based approach.
• Submit team information/contact sheet
• Review progress on specifying research questions and dividing up work.

Readings: Hsu et al. KDF) 83-96
Deliverables: Team charter is due September 15 at noon via e-mail.

Class 3  Organizing and Negotiating the Contract   September 29

In Class:
- Review of charter with teams.
- Review Evidence-based approach in DeSalvio case study.
- Discussion of what you need to get out of kick-off meeting.
- Preliminary discussion of any proposed research study.

Reading for Class:  DiSalvio Case Study (in KDR) 121-136
   Block: Chapters 4, 5, and 19

Deliverables:
- Draft outline of any proposed research study.

Class 4  Client Expectations and Satisfaction     October 13

In Class:
- Project Management
  - What does the client want? What are the client’s expectations?
  - What problems does the client want to solve?
    Narrow vs broad expectations about outcomes
    Distinguish between symptoms and underlying problems
    Understand multiple views of the problem within the organization
    Translate the management challenge into a research question(s).
- Discuss how consultants identify stakeholders, develop a view of the organization, and define problems to be solved in developing a framework for the meeting.
- Discuss how the client’s culture may affect the team’s approach to the project.
- Review of kick-off meeting with the client
  - What will constitute a successful client engagement
  - Follow up tasks: set expectations regarding what happens after the meeting

Reading for Class:  Block, Chapter 10
   Webb and Flaherty (in KDF) 161-170

Deliverables:
- Prepare a two-page, double-spaced summary of kick-off meeting findings (due to professor by October 17 via e-mail at noon.
Class 5  Getting and Validating the Evidence (Guest Lecturer)  October 27

In class:
- Discussion of search strategy.
- How obtain the evidence?
- How validate the evidence?
- Discussion of data collection methods

Readings: Block, Chapter 11
Bray case study (KDF) 233-248

Deliverables:
- Prepare draft of client contract and work plan (due to professor by noon on October 19 (via e-mail), to be discussed during Class 6. Include a chart/map of the intended model as related to the planned intervention.
- Draft outline of proposed search strategy, to include best practices, due October 20.

Class 6  Teamwork (Guest lecturer, Willie Manzano)  November 10

In Class:
- Discussion of teamwork related issues
  - Types of problems that arise in teams
  - Conflict resolution techniques
  - Revisit and revise team charter as necessary
- Why teams succeed and fail
- Difficult conversations

Reading for class: Wheelan, entire book.

Class 7  Work Plan presentations  November 24

In Class:
- Review of search strategy
- Each team presents its draft contract and workplan
- Discussion of your own research design, as appropriate.

Readings: Block, Chapters 13-14
White and Cassel case study (KDF) 171-180

Deliverables: Submit draft of work contract and work plan due to professor by Nov 21 and to client by November 28).
Class 8  Applicability and Actionability of the Evidence  December 8

In Class:
- Discussion of Grazier and Prybil case studies.
- Discuss implementation of work plans during mid-semester break.

Reading: Grazier and Prybil case studies (KDF) 181-188, 153-160

Deliverables:
- Schedule interim presentation to client by December 10, include professor in attendee list.
- Draft interim presentation due to professor December 10 by e-mail at noon.
- Submit signed contract by December 22, after interim meeting with the client.

SPRING SEMESTER 2009

The two major products of this term are the project presentation and the project final report.

The **presentation** is the event at which the team presents the client with a summary of findings and recommendations and an overview of the methodology used. It is often an interactive session during which the team may be asked to explain or discuss findings, recommendations, or methodology.

The **final report** is the final document that states the problem, describes in more detail the methodology used to address the problem, proposes and explains the conclusions, and includes the source material used to support the report. It may contain other relevant information, such as the results of a literature search on the topic or other data that the team thinks will be valuable to the client.

**Team Readings Assignment (non-graded)**

Readings (to be completed by January 19). Gray (pages 1-263) or Pfeffer and Sutton  Two team member at least read different books.

Submit in 3-4 pages discussion of how either or both books are helping you with your project or in learning about EBMgmt. Assume the professor has read both books. Give examples either how the books are helping with the projects or helping you to learn about evidence-based management (i.e. what is the stuff you didn’t know before reading these books that you learned from these books). Assignment is due by January 19 at 12 noon.

Class 9  Sharing of Team Experiences  January 19

- Discussion of Gray and Pfeffer/Sutton books.
- What have you learned so far?
- What are the key challenges you face spring semester?
- What are your contingency plans if you encounter data problems?
Class 10  Preparing Final Report and Client Presentation  March 9
In Class:
- Progress Reports and Milestones
- Team meetings/professor consultations
- Final report requirements
- Presentation skills

Deliverables: Rough draft of final report is due to professor via e-mail by March 9 at 5:00 pm (draft should include executive summary, background on client organizations, overview of methodology and its limits). Send second draft of final report to client for review and comments. Rough draft of presentation slides due to professor via e-mail by March 10 at 5:00 pm.

ABSTRACTS DUE FOR END EVENT to David Schachter by March 20, 2008.

Class 11  Presentation Rehearsal  April 20

Deliverables:
- Schedule rehearsals with professor April 13-20
- Schedule final presentation with client by April 20 and include professor in attendee list.
- Class presentations (rehearsal for client presentations)

Class 12  Poster Presentations and Graduation Party  (TBA)
At Griffis Lounge on 70th street.
- Pick up poster board from David Schachter for May Final Capstone Event

Deliverables: Final report and presentation done for client by April 28