CAPSTONE FOR NURSE LEADERS

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 (12 classroom sessions and 3-5 small group 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 Reading


Professor Availability

Teams are encouraged to meet with the professor 2-3 times per semester outside of class either at 435 East 70th street, the hospital site for the capstone, or at the Wagner School.

3890-1 CLASS SCHEDULE AND ASSIGNMENTS

FALL

Class 1 September 7 Do class readings in advance.

Class 2 September 14 Team charter due at noon.

Class 3 September 29 Kick-off meeting agenda due at noon. Draft outline of any proposed research study by 12 Noon on Sept 28.

Class 4 October 12 Draft contract/work plan by 5pm on Oct 12 noon.
Class 5  October 26  Revised contract and work plan by 5pm on Oct 19. Draft outline of search strategy, to include best practices, due Oct 19

Class 6  November 9  Mid-Semester course evaluation

Class 7  November 23  Final draft client contract due.


Student teams are expected to execute much of their work plan between December 14 and January 18 with five days off for holidays.

SPRING

Class 9  January 18  Team Book Report and progress reports.


Class 11  April 19  Rehearsal of presentations/delivery of final Report (1). Client presentation given by April 25

Class 12  April 26  Rehearsal of presentations/delivery of final report. (2). Client presentation by April 25.

WEEKLY ASSIGNMENTS

Class 1  Course Overview  September 7

- Review of syllabus and course expectations
- Teams review where they are in specifying research questions.
- Toward team and project assignments

Readings:
Kovner, D’Aquila and Fine (in KDF), Introduction and 17-52
Sample capstone materials from 2008-9 (handout packet)
Briner, Denyer and Rousseau, “Evidence-Based Management: Concept
(Blackboard)

Class 2 Applying Evidence-Based Management September 14

- Guest speakers from last year’s capstone teams (TBA)
- 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
Rundall & Kovner, 53-82 (KDF)
Mody (KDF) 97-108

Deliverables: Team charter is due September 14 at noon via e-mail.

Class 3 Organizing and Negotiating the Contract September 28

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

Readings: Block: Chapters 4, 5, and 19
Final 2010 Capstone Reports: Care Management at NY/P and Capital Budgeting.
(handout packet)

Deliverables:
- Draft outline of any proposed research study.

Class 4 Client Expectations and Satisfaction October 12

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

Readings: Block, Chapter 10
DeSalvio (in KDF) 121-136

Deliverables:
- Prepare a two-page, double-spaced summary of kick-off meeting findings (due to professor by October 16 via e-mail at noon.

Class 5  Getting and Validating the Evidence (Guest Lecturer TBA) October 26

In class:
- Discussion of search strategy.
- How obtain the evidence?
- How validate the evidence?
- Discussion of literature reviews, best practice and suggestions for further research

Readings: Block, Chapter 11
“Flaws in Strategic Decision making,” The McKinsey Quarterly, 2009, pp 1-6 (Blackboard)

Deliverables:
- Prepare draft of client contract and work plan (due to professor by noon on October 18 (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 19.

Class 6  Teamwork (Guest lecturer, Willie Manzano) November 9

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


Class 7  Discussion of Work Plans (Team presentations)  November 22

In Class:
- Review of search strategy
- Each team presents its draft contract and workplan
- Modelling of the process

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:
- Applicability of the evidence.
- Actionability of the evidence.
- Suggestions for future self-funded research.


Deliverables:
- Schedule interim presentation to client by December 9, include professor in attendee list.
- Draft interim presentation due to professor December 9 by e-mail at noon.
- Submit signed contract by December 21, 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.
Class 9  Sharing of Team Experiences  January 18

- What have you learned so far in the course?
- What are the key challenges you face spring semester?
- What are your contingency plans if you encounter data problems?

Reading: "Have it Now," 2008-9 Capstone Final Report (Handout packet)

Class 10  Preparing Final Report and Client Presentation  March 8

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 8 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 9 at 5:00 pm

ABSTRACTS DUE FOR END EVENT to David Schachter by March 19, 2008.

Class 11  Presentation Rehearsal (1)  April 19

*Deliverables:*
- Schedule rehearsals with professor April 12-19
- Schedule final presentation with client by April 19 and include professor in attendee list.
- Class presentations (rehearsal for client presentations)

Class 12  Presentation Rehearsals (2)

- Pick up poster board from David Schachter for May Final Capstone Event

*Deliverables:* Final report and presentation done for client by April 27