What does an organization have to do to continually improve?

Part 2: Tools and tactics to take action

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Team-Based Care Emerging Leaders

September 20 , 2018

Part 1: Tools to Identify Changes Needed

Process Mapping

Cause & Effect Diagram
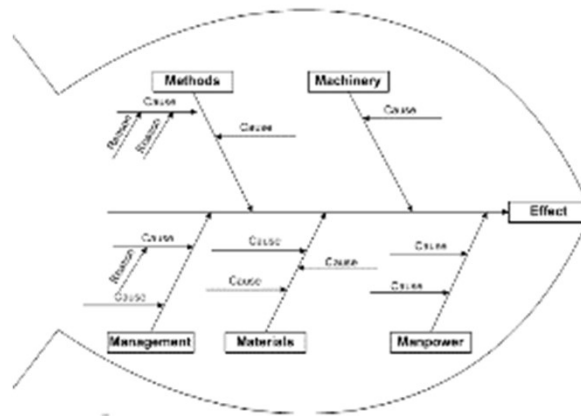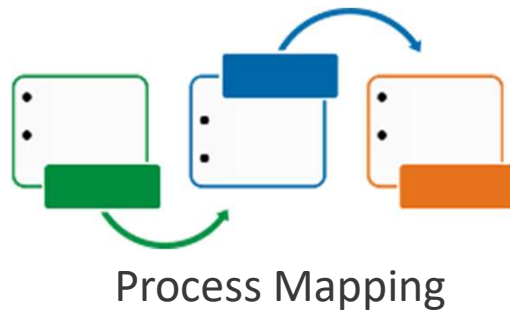
Identified Root Causes	Frequency of Occurrence	Impact when it occurs	Prioritization
Primary Driver 1 (Initial Cause)			
Cause 1	2	1	2x1=2
Cause 2	3	2	3x2=6
Primary Driver 2 (Initial Cause)			
Cause 3	3	1	3x1=3
Cause 4	1	1	1x1=1

Root Cause Analysis and Prioritization

QI Tools Webinar at
https://tap.adobeconnect.com/EL

Improvement Steps for Emerging Leaders

1. **Identify improvement opportunities**

2. **Form a team including leadership**

3. **Begin with Aims**

4. **Establish measures**

5. **Select changes**

6. **Test changes and learn**

7. Implement improvements

8. Spread improvements

9. Sustain improvements

Taking action to improve identified challenges

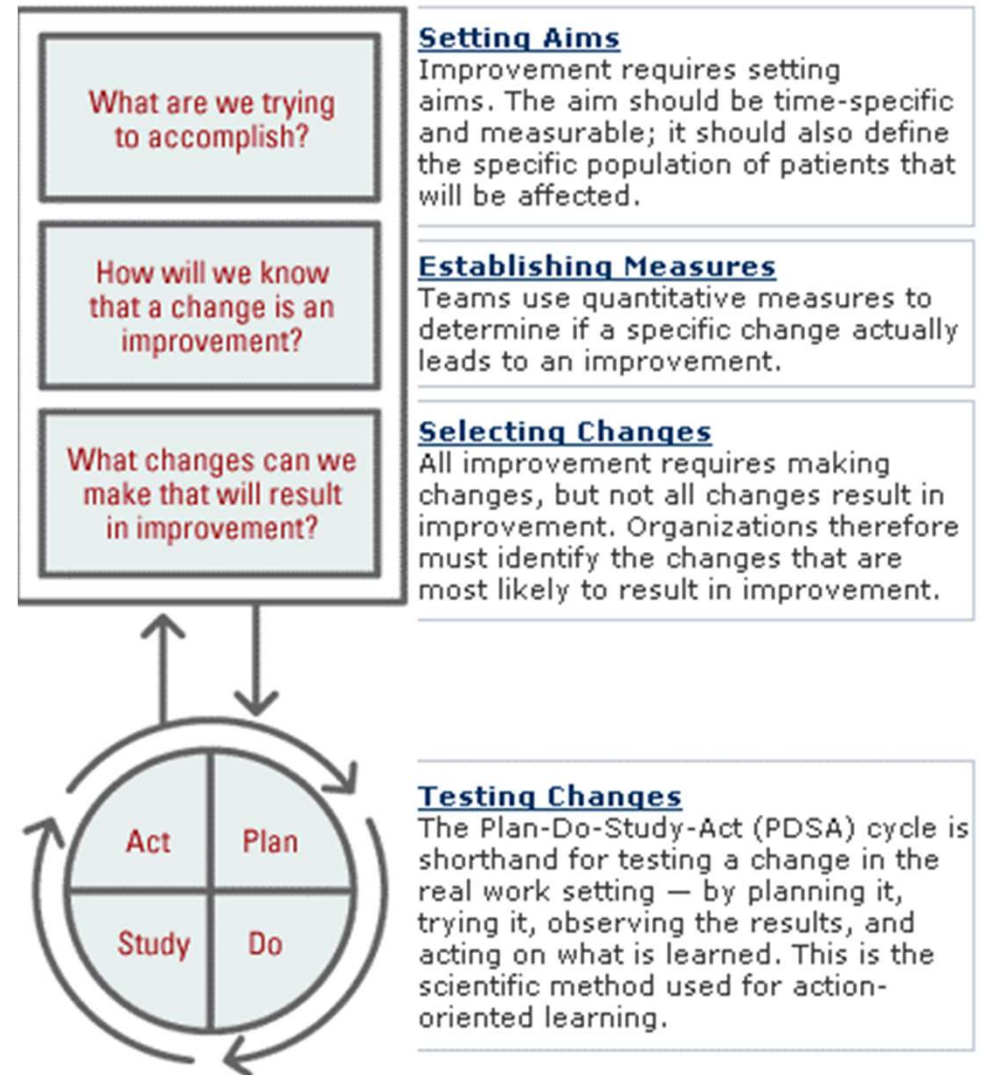| 1. Identify problem	2. Form a team	3. Set Aims	4. Establish measures
Get leadership buy-in for improvement Use tools to identify and understand the problem or challenge	Involve key stakeholders including management and /or leadership and staff involved	Time specific Measurable Defines the target population or system Guides the approach to change	Quantitative measures to determine if change creates improvement

5. Select Changes

Get lots of input from:

- People who work in the system

- Patients and families who use the system

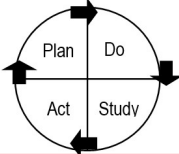- Others with experience in improving the system (change packages)

The IHI Model for Improvement

What are we trying to accomplish?

How will we know that a change is an improvement?

What changes can we make that will result in improvement?

Act | Plan
Study | Do

Setting Aims
Improvement requires setting aims. The aim should be time-specific and measurable; it should also define the specific population of patients that will be affected.

Establishing Measures
Teams use quantitative measures to determine if a specific change actually leads to an improvement.

Selecting Changes
All improvement requires making changes, but not all changes result in improvement. Organizations therefore must identify the changes that are most likely to result in improvement.

Testing Changes
The Plan-Do-Study-Act (PDSA) cycle is shorthand for testing a change in the real work setting — by planning it, trying it, observing the results, and acting on what is learned. This is the scientific method used for action-oriented learning.

TBC
Team Based Care

6. Test Changes-PlanDSA

Plan the test

- Clearly state the objective of the test
- List questions are you trying to answer
- Summarize previous tests
- Make predictions
- Shrink the change
- Plan for collecting and studying the data
- Develop the test details

PDSA WORKSHEET

| Team Name: | Date of test: | Test Completion Date: |

Overall team/project aim:

What is the objective of the test?

PLAN:
Briefly describe the test.

What have we learned from previous related PDSAs? Summarize briefly.

How will you know that the change is an improvement?

What do you predict will happen?

PLAN

List the tasks necessary to complete this test (what)	Person responsible (who)	When	Where
1.			
2.			
3.			
4.			
5.			
6.			

Plan for collection of data:

DO: Test the changes.

Was the cycle carried out as planned? ☐ Yes ☐ No

Record data and observations.

What did you observe that was not part of our plan?

STUDY:
Did the results match your predictions? ☐ Yes ☐ No

Compare the result of your test to your previous performance:

What did you learn?

ACT: Decide to Adopt, Adapt, or Abandon.

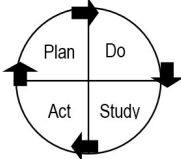☐ Adapt: Improve the change and continue testing plan. Plans/changes for next test:

☐ Adopt: Select changes to implement on a larger scale and develop an implementation plan and plan for sustainability

☐ Abandon: Discard this change idea and try a different one

6. Test Changes-PDoSA

Do the test

- Try out the test on a small scale

- Get feedback on the test

- Document problems and unexpected observations

- Be sure to communicate this is just a test

PDSA WORKSHEET

Team Name:	Date of test:	Test Completion Date:
Overall team/project aim:		
What is the objective of the test?		

PLAN:
Briefly describe the test.

What have we learned from previous related PDSAs? Summarize briefly.

How will you know that the change is an improvement?

What do you predict will happen?

PLAN

List the tasks necessary to complete this test (what)	Person responsible (who)	When	Where
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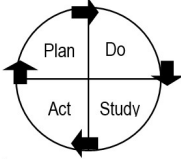☐ Adapt: Improve the change and continue testing plan. Plans/changes for next test:

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6. Test Changes-PDStudyA

Study the results

- Block time to analyze the data

- Complete the analysis of the data

- Compare the outcomes to predictions

- Summarize and reflect on what was learned

- Remind people this was just a test, and share results

PDSA WORKSHEET

Team Name:	Date of test:	Test Completion Date:

Overall team/project aim:

What is the objective of the test?

Plan | Do
Act | Study

PLAN:
Briefly describe the test.

What have we learned from previous related PDSAs? Summarize briefly.

How will you know that the change is an improvement?

What do you predict will happen?

PLAN

List the tasks necessary to complete this test (what)	Person responsible (who)	When	Where
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☐ Adapt: Improve the change and continue testing plan.
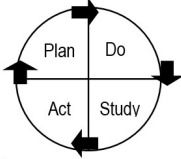Plans/changes for next test:

☐ Adopt: Select changes to implement on a larger scale and develop an implementation plan and plan for sustainability

☐ Abandon: Discard this change idea and try a different one

6. Test Changes-PDSAct

Act on the results

- Refine the change based on learnings

- Make modifications

- Prepare and plan for the next test

- Or document clearly why there shouldn't be a next test

PDSA WORKSHEET

Team Name:	Date of test:	Test Completion Date:

Overall team/project aim:

What is the objective of the test?

PLAN:
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How will you know that the change is an improvement?

What do you predict will happen?

PLAN

List the tasks necessary to complete this test (what)	Person responsible (who)	When	Where
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2.			
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5.			
6.			

Plan for collection of data:

DO: Test the changes.

Was the cycle carried out as planned?   ☐ Yes ☐ No

Record data and observations.

What did you observe that was not part of our plan?

STUDY:
Did the results match your predictions?   ☐ Yes ☐ No

Compare the result of your test to your previous performance:

What did you learn?

ACT: Decide to Adopt, Adapt, or Abandon.

☐   Adapt: Improve the change and continue testing plan.
Plans/changes for next test:

☐   Adopt: Select changes to implement on a larger scale and develop an implementation plan and plan for sustainability

☐   Abandon: Discard this change idea and try a different one

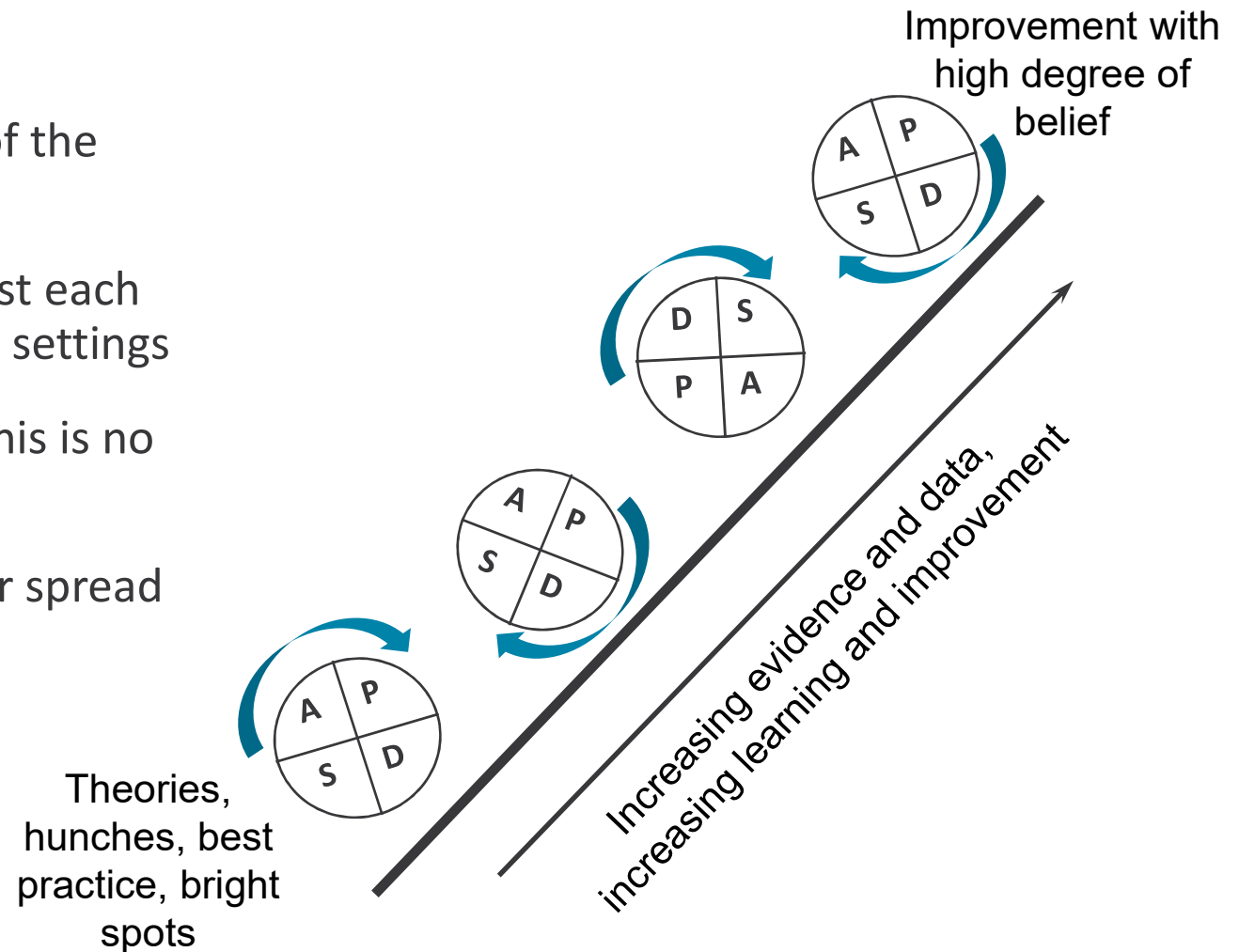# 6. Test Changes...practice makes perfect!

Marisa Garza, 5, working on an assignment at Riverside Elementary School in Menomonee Falls, Wis. The board behind her encouraged the "plan-do-study-act" problem-solving cycle.

Andrew Nelles for The New York Times

6. Test Changes-improvement is iterative…

- Test each version of the change

- Once perfected, test each change in different settings

- Tell people when this is no longer just a test

- Test the process for spread

Improvement with high degree of belief

Increasing evidence and data, increasing learning and improvement

Theories, hunches, best practice, bright spots

7,8,9. Enlist Managers and Leadership for Spread

1. Identify improvement opportunities

2. Form a team

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8. **Spread improvements**

9. **Sustain improvements**

Questions?

What are we trying to accomplish?

How will we know that a change is an improvement?

What changes can we make that will result in improvement?

A P
S D

Get Ready for the In-Person Meeting
October 16, 2018

THE FOUR LEADERSHIP STYLES

(High)

SUPPORTIVE BEHAVIOR

High Supportive and Low Directive Behavior

High Directive and High Supportive Behavior

SUPPORTING S3   COACHING S2

DELEGATING S4   DIRECTING S1

Low Supportive and Low Directive Behavior

High Directive and Low Supportive Behavior

(Low) ——— DIRECTIVE BEHAVIOR ——→ (High)

1. Review notes, try out Situational Leadership models and be prepared to share your experience.

2. Think about a current issue or situation that you're struggling to understand and/or resolve where your peers might be helpful.

TBC
Team Based Care

More?

IHI Video on PDSA Part 1
http://www.ihi.org/education/IHIOpenSchool/resources/Pages/AudioandVideo/Whiteboard5.aspx

IHI Video on PDSA Part 2
http://www.ihi.org/education/IHIOpenSchool/resources/Pages/AudioandVideo/Whiteboard6.aspx

IHI QI Essentials Toolkit

http://www.ihi.org/resources/Pages/Tools/Quality-Improvement-Essentials-Toolkit.aspx?utm_campaign=QI-Toolkit-Promotion&utm_medium=Whiteboard-Video&utm_source=ihi

IHI Free Online QI Course

http://www.ihi.org/education/IHIOpenSchool/resources/Pages/QI-102-How-to-Improve-with-the-Model-for-Improvement.aspx