Quality Improvement (QI) Seminar Series

Syllabus for 2022-2023

Session 1 – An overview of Quality Improvement (10/13/22)

Goals
- Learn a bit more about each other
- Develop a shared understanding of the seminar series
- Discuss a framework for improving care
- Explore examples of improving care from our sites

Topics
- Introductions
- Goals for seminar series and site projects
- Linking evidence to improvement
- Examples of improving care

Context
- This session will give a broad view of how an interdisciplinary team can adapt a structured approach to improve the quality of care provided to patients; sharing ideas of what quality improvement means.

Resources/References
- Batalden PB, Davidoff F. Quality Safety in Health Care. 2007; 16:2-3.
- Langley GJ, Moen R, Nolan KM, Nolan, TW, Norman CL, and Provost LP. The Improvement Guide: A Practical Approach to Enhancing Organizational Performance (2nd Edition). San Francisco, CA: Jossey-Bass, 2009.

Assignment
- Develop a list of things you are noticing at your site about the way care is provided
- Based on your list, what are some things you are wondering about related to improving care?
- Work with your site colleagues to generate a composite Notice/Wonder list
- Check with leaders/providers/team members at your site to find out what they are working on to improve care

Session 2 – Observations about Care & Stakeholder Considerations (10/27/22)

Goals
- Hear about and discuss many of the things you are noticing and wondering about
- Review the evidence for the team-based care approach in primary care
- Share some examples of team-based care in your setting

Topics
- Observations about care
- High performing, team-based primary care

Context
- Curiosity is one of the keys to improving processes. This session will focus on the importance and rationale of understanding the processes that exist in your workspace, other team members that interact with you and the process, what gaps you observe in the process and how the organization supports the process.

Resources/References
- Bodenheimer T, Ghorob A, Willard-Grace R, Grumbach K. Ann Fam Med 2014;166-171. doi:10.1370/afm.1616
- NCA Implementing Team-Based Care Webinar (https://moodle.weitzmaninstitute.org/course/view.php?id=6)
- Batalden PB, Davidoff F. Qual Saf Health Care. 2007; 16:2-3

Assignment
- Decide on the topic for the project you would like to develop and the team of people with whom you will work on the project
- If you are not familiar with the idea of brainstorming, watch the two brief videos for examples of a group brainstorming
- Session preparation (review the template):
  - Project Charter
- Work with your project team colleagues to begin populating the project charter with your topic, team members and ideas about stakeholders

Session 3 – Organizing Your Improvement Project (11/10/22)

Goals
- Briefly review the difference between quality improvement and research
- Introduce the Project Charter with focus on three elements of the charter process
  - Using a structured aim statement
  - Process analysis using flowcharts

   o Consideration of changes based on process analysis and information from initial data
- Continue consideration of stakeholders for your project topic

Topics
- Quality improvement vs. research
- Project charter

Context
- Improvement project work is multi-faceted and usually involves many people or even a team. Staying organized is a critical aspect of a successful project. This session provides a tool – the project charter – to help you organize and communicate about your work.

Resources/References
- Splaine ME, Dolansky MA, Estrada CA, and Patrician PA. <u>Practice-Based Learning and Improvement: A Clinical Improvement Action Guide (3rd Edition)</u>. Oakbrook Terrace, IL: Joint Commission Resources, 2012.
- Langley GJ, Moen R, Nolan KM, Nolan, TW, Norman CL, and Provost LP. <u>The Improvement Guide: A Practical Approach to Enhancing Organizational Performance (2nd Edition)</u>. San Francisco, CA: Jossey-Bass, 2009.

Assignment
- Finalize your project topic and team
- Session preparation (review the templates):
   o Global aim statement
   o Fishbone (cause-and-effect) diagram

Session 4 – Global Aim Statement and Fishbone Diagram (12/8/22)
Goals
- Formalize the idea you have for a project into a global aim statement
- Draft a problem statement related to your global aim
- Brainstorm ideas to begin populating your fishbone diagram

Topics
- Global aim statement template and examples
- Fishbone (cause and effect) diagram template and examples

Context
- Developing a global aim statement is the first step in creating a written summary of what you intend to accomplish in a quality improvement effort. This statement helps you communicate to others what your effort is focused on. With this statement in hand, you

can then begin to explore the potential issues or challenges that are at the root of why the area you have selected is ripe for improvement. A fishbone (cause-and-effect) diagram is a helpful tool to organize your thinking as you brainstorm ideas of causes.

Resources/References
- Aim Statements
    - Science of Improvement: Setting Aims. Institute for Healthcare Improvement Website. ([http://www.ihi.org/resources/Pages/HowtoImprove/ScienceofImprovementSetting Aims.aspx](http://www.ihi.org/resources/Pages/HowtoImprove/ScienceofImprovementSettingAims.aspx)) Accessed September 20, 2021.
    - Global Aim Statement Document. Society of Teachers of Family Medicine Resource Library Website. (https://resourcelibrary.stfm.org/HigherLogic/System/DownloadDocumentFile.ashx?DocumentFileKey=27fc6113-ab04-4100-966c-8d2349b4494c&forceDialog=1) Accessed September 20, 2021
    QI Tips: A Formula for Developing a Great Aim Statement. National Institute for Children's Health Quality Website. (https://www.nichq.org/insight/qi-tips-formula-developing-great-aim-statement) Accessed September 20, 2021.
- Fishbone Diagrams
    - American Society for Quality Website. (https://asq.org/quality-resources/fishbone) Accessed September 14, 2021.

Assignment
- Revise your global aim statement, if needed, based on today's discussion or additional ideas you have about your project
- Review your initial fishbone diagram draft, and brainstorm as a group about additional factors that contribute to your problem statement
- Session preparation (background on flowcharting):
    - Watch the two videos on flowcharting
    - Read the document on flowcharting
- Work with your site colleagues to generate a draft of the <u>actual process</u> for your project topic
- If you have time, review your ideas about the process with others involved in the process for their feedback

Session 5 – Process Mapping (Flowcharts) (12/22/22)
Goals
- Hear about and discuss the example of a process you chose to explore in detail
- Review details of how to approach flowcharting

- Share examples of strategies to consider when doing flowcharting

Topics
- Flowcharting examples
- Tips and strategies for effective process mapping

Context
- Walking through an entire process might only skim the surface to fully understand all of the intricacies and details around the work that goes into the process from beginning to end. This session will teach a structured method to assure you understand each step of the current process, how to identify gaps and ask more questions in order to approach an improvement effort in an informed way.

Resources/References
- The two video links provided below will give you a brief but helpful introduction to developing a process map (flowchart)
  - https://www.youtube.com/watch?v=GoEP4dTAmAQ   (simple overview, roughly 4 minutes)
  - https://www.youtube.com/watch?v=JENOhSXzi2U   (more detailed info, roughly 8 minutes)
- Additional reading to provide more detailed insights about flowcharting

Assignment
- Revise your flowchart, if needed, based on today's discussion or additional ideas you have about the actual process
- Watch the video on Balanced Measures
- Next, review your process and brainstorm as a group about a balanced set of measures for your process

Session 6 – Measurement to Inform Change: Defining Measures & Collecting Data (1/12/23)

Goals
- Appreciate the value of using balanced measures in quality improvement work
- Construct a value compass of measures for a specific clinical condition
- Recognize the difference between a conceptual and an operational definition
- Develop an operational definition for a measure
- Formulate a plan for collecting data for a specific measure and identify potential associated challenges in the data collection

Topics
- Flowchart examples
- Balanced measures
- Operational definitions
- Planning to collect data

Context
- To understand if a change has resulted in an improvement, one must be able to measure the effect of the change. This session focuses on three issues related to quality measure – understanding the importance of having more than one (balancing) measure, developing a clear definition of a measure, and considering key steps in collecting data for a measure.

Resources/References
- Langley GJ, Moen R, Nolan KM, Nolan, TW, Norman CL, and Provost LP. The Improvement Guide: A Practical Approach to Enhancing Organizational Performance (2nd Edition). San Francisco, CA: Jossey-Bass, 2009. Chapter 1, pp 23-25.
- Nelson EC, Splaine ME, Batalden PB, Plume SK. Building measurement and data collection into medical practice. Ann Intern Med 1998; 128(6): 460-466.
- George ML, Rowlands D, Price M, and Maxley J. The Lean Six Sigma Pocket Toolbook. New York, NY: McGraw-Hill, 2005. Chapters 6 and 7, pp 104-118.

Assignment
- Focus for next session is understanding variation
  - o We will discuss how to identify different patterns of variation and what these patterns mean
  - o We will learn about run charts as a new way to display data over time and analyze the data for the type(s) of variation present
- Please read the following
  - o Perla article on run charts (BMJ Quality and Safety)

Session 7 – Measurement to Inform Change: Run Charts (1/26/23)
Goals
- Demonstrate the value of displaying data over time
- Introduce the distinction between random (common cause) and non-random (special cause) variation
- Review a temporal display and analysis method -- the run chart
- Offer examples in practice of using run chart

Topics
- Displaying data over time – time plots
- Types of variation
- Run charts

Context
- Viewing data graphically over time helps to display patterns in the variation of the data that are not apparent when the data are aggregated. The patterns of variation can be identified and used to provide additional information about the effect of change on a measure, especially when using specific tools such as a run chart.

Resources/References
- Langley GJ, Moen R, Nolan KM, Nolan, TW, Norman CL, and Provost LP. <u>The Improvement Guide: A Practical Approach to Enhancing Organizational Performance (2nd Edition)</u>. San Francisco, CA: Jossey-Bass, 2009. Chapter 1, pp 23-25.
- Perla RJ, Provost LP, and Murray SK. The run chart: a simple analytical tool for learning from variation in healthcare processes. BMJ Qual Saf. 2011;20:46-51.

Assignment
- You have learned about a tools for displaying data over time (run chart)
- Now it is your turn to use the tool (template sent with email of slides)
- Pick a measure and display it on a run chart and then interpret the results

Session 8 – An Approach to Testing Change (2/9/23)
Goals
- Review & learn by sharing your examples
- Introduce the Plan-Do-Study-Act (PDSA) cycle as a method for making change
- Discuss organizing a PDSA cycle using the PDSA Worksheet
- Share examples from existing improvement projects
- Practice creating a PDSA using the tool

Topics
- PDSA cycles
- PDSA worksheet

Context
- This session provides an introduction to the Plan-Do-Study-Act (PDSA) cycle for making change. This is one of many methods for approaching change in the health care workplace. We have chosen this approach due to its simplicity to implement and it link to the Model for Improvement.

Resources/References
- Donald Berwick, MD, MPP, President and CEO, IHI, www.ihi.org
- The Improvement Guide: A Practical Approach to Enhancing Organizational Performance (2nd Edition), Langley GL, Nolan KM, Nolan TW, Norman CL, Provost LP, San Francisco, California, USA: Jossey-Bass Publishers; 2009
- Health Resources and Services Administration, agency of U.S. Department of Health and Human Services, Rockville, Maryland: Testing for Improvement Part 2 (https://www.hrsa.gov/quality/toolbox/methodology/testingforimprovement/part2.html)

Assignment
- Read the HRSA case study (see Word document)
- Complete a PDSA form
- Include list of metrics that should be measured

Session 9 – Communication about Your Improvement Effort (2/23/23)

Goals
- Strategies for planning a Plan-Do-Study-Act (PDSA) cycle
- Share examples of PDSA approaches from your projects
- Review tools for communication plans and stakeholder analysis
- Practice developing a stakeholder analysis plan

Topics
- Communication plan
- Influencing strategy
- Stakeholder analysis

Context
- This session provides some tools that help you organize your thinking and your approach to communicating with others about your improvement work. Communication is a key element to achieving buy-in from others, especially when linked to making change.

Resources/References
- HRSA.org - Health Resources and Services Administration, agency of U.S. Department of Health and Human Services, Rockville, Maryland: Testing for Improvement

Assignment
- Interview one of the stakeholders for your planned change
- In your interview, please include the following:
  - Initial reactions regarding this test?
  - Prediction of success?

        o   Best communication method for specific group?

Session 10 – Stakeholder Analysis and Conflict Management (3/9/23)

Goals
- Learn about input from stakeholders related to a planned change
- Discuss strategies for further engaging stakeholders
- Develop approaches for managing conflict
- Practice using a conflict management approach

Topics
- Conflict management and skill development

Context
- We discussed the importance of know who your stakeholders are in Session 2. In this session, we review a more detailed approach to thinking about stakeholders. In addition, we introduce some concepts for managing conflict that you may find useful in your work or personal life.

Resources/References
- Kerwin, Patrick L. *From Conflict to Confluence.* Psychometrics.com. May, 2015.
- Conflict 911. *Conflict Resolution Skills.* Edcc.edu. December, 2014
- Holmes, Shelly. *Types of Conflict in the Workplace.* www.makeadentleadership.com. January, 2014.
- Conflict Resolution - *Resolving conflict rationally and effectively.* Leadership training/MindTools.com. January 9, 2014.
- Heitler, Susan Ph.D. *What Makes Conflict? How Are Conflicts Resolved? Disagreements happen, at work and at home. How best to resolve them?* Psychologytoday.com. Nov 14, 2012
- Bakker, Shawn. *Personality Type and Conflict Management.* Psychometrics.com. 2015

Assignment
- Download the Conflict Management Style Assessment document (sent separately with slides)
  - Complete the questionnaire and score your results
- Be prepared to discuss your conflict resolution style at our next session

Session 11 – Managing Up and Gaining Leadership Buy-In (3/23/23)

Goals
- Understand common challenges when working with leaders on a QI effort
- Review and discuss effective strategies when communicating with leaders

- Consider approaches to developing yourself as a leader

Topics
- Conflict management styles
- Strategies for communicating with leaders
- Elevator speech

Context
- Improvement work is unlikely to progress without support from leaders. This session focuses on strategies for communicating with leaders and gaining their buy-in for your work.

Resources/References
- Abbajay, M. (2018). *Managing up: How to move up, win at work, and succeed with any type of boss*. John Wiley & Sons, Inc.
- Biesenbach, R. (2018). *Unleash the power of storytelling: Win hearts, change minds, get results*. Eastlawn Media.

Assignment
- Read the overview of the negotiation case
- Your team will be assigned a role in the live negotiation during our next session
- If your team is one of the negotiation participants, please do the following:
    - Read your confidential instructions carefully
    - Meet as a team to prepare your negotiation strategy and plan
    - Clarify any questions your team has

Session 12 – Negotiation (4/13/23)

Goals
- To discuss using a conflict management approach
- To review some principles about effective negotiation
- To practice an actual negotiation and debrief about what we observed

Topics
- Principled negotiation

Context
- Negotiation is part of work and all relationships. In this session, we introduce the concept of principled negotiation and provide a chance to practice negotiation skills through a live role play of a case involving two parties.

Resources/References
- Fisher ES. Negotiation case. Used with permission.
- Getting to Yes (a brief video summary) – 4 mins
  - https://www.youtube.com/watch?v=zTH2zEvDxRc
- William Ury: The walk from "no" to "yes" (a TED Talk by Ury – 19 minutes)
  - https://www.youtube.com/watch?v=6xCkhV7zhuw

Assignment
- Describe a negotiation in which you have recently taken part
  - Share information about the setting, other participants and the issues at stake.
  - What was the result?
- What went well in the negotiation? What could have been improved?

Session 13 – Negotiation and More About Cycles of Change (4/27/23)
Goals
- To learn from your application of negotiation skills
- To continue and deepen our discussion about PDSA cycles
- To look ahead and discuss some upcoming sessions in our seminar series

Topics
- Personal negotiation experiences
- PDSA challenges

Context
- In this session, we complete our discussion of negotiation strategies and then return to considering additional challenges about making change. Having introduced the PDSA model of rapid cycle change in Session 8, we return to this topic to provide additional insights and understand the challenges teams are facing in considering a change.

Resources/References
- Reed JE, Card AJ. The problem with Plan-Do-Study-Act cycles. *BMJ Qual Saf* 2016; 25:147-152. doi: 10.1136/bmjqs-2015-005076.
- AHRQ. *Health Literacy Universal Precautions Toolkit, 2nd Edition.* (https://www.ahrq.gov/professionals/quality-patient-safety/quality-resources/tools/literacy-toolkit/healthlittoolkit2-tool2b.html) Accessed 4/21/19

Assignment
- Review the article by Reed and Card related to PDSA cycle challenges.
- Reflect on your teams experience in trying to test a change:
  - What challenges have you encountered?

o In retrospect, could you have anticipated any of the challenges?

o What ideas do you have for addressing the challenges?

Session 14 – Sustaining Your Improvement Effort (5/11/23)

Goals

- Learn and review strategies in order to successfully sustain and spread a proven improvement process
- Translate ideas from the strategies to thinking about the spread of your own QI effort
- To look ahead and discuss some upcoming sessions in our seminar series

Topics

- Sustaining cycles
- Playbooks

Context

- In improvement work, getting started is always a challenge. Once an effort takes off and begins to build momentum, another essential issue to consider is how to sustain the effort. This session will cover some strategies for sustaining improvement and also consider the issue of spreading a result to another setting.

Resources/References

- Nelson E, Batalden P, Godfrey M. Quality By Design. 2007; Chapter 14, pp. 278-283.

Assignment

- Prepare your team presentation
- Seek out help or advice from faculty and colleagues at your site as needed

Sessions 15, 16, 17 – Project Team Presentations (5/25/23, 6/8/23, 6/22/23)

Goals

- Share an update of what your team has accomplished thus far in your improvement effort
- Practice summarizing and presenting your work in a manner similar to that commonly use in professional meetings

Topic

- Team presentations

Context

- Each of these final sessions will feature teams presenting an update on the projects. Teams will do a 10 minute presentation with slides on Zoom. There will be 10 minutes for questions and discussion of each presentation.