

STRATEGIC

RELEVANT

FOCUSED

Quality Improvement Seminar

INTERACTIVE

TEAMWORK

INFORMATIVE

FUN

SKILL BUILDING

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February 26, 2026



**Nurse Practitioner & Physician Assistant
Training Programs**



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Session Goals

- Review strategies for planning a Plan-Do-Study-Act (PDSA) cycle
- Share examples of PDSA approaches from your projects
- Hear an example from a leader regarding work with stakeholders
- Review tools for communication plans and stakeholder analysis
- Practice developing a stakeholder analysis plan



Roles

- Theory burst presenter
 - Mark
- Timekeeper & technical genius
 - Emma
- Take-home thoughts
 - Mark and Emma



Agenda

- Welcome (5 minutes)
- Data display examples (7 minutes)
- PDSA case discussion (8 minutes)
- A PDSA example (10 minutes)
- Stakeholder examples (10 minutes)
- Theory burst (10 minutes)
 - ✓ Stakeholder Analysis/Influencing Strategy/Communication Plan
- Summary and take-home points (5 minutes)
- Break (5 minutes)
- Project team work (30 minutes)



Curriculum Plan

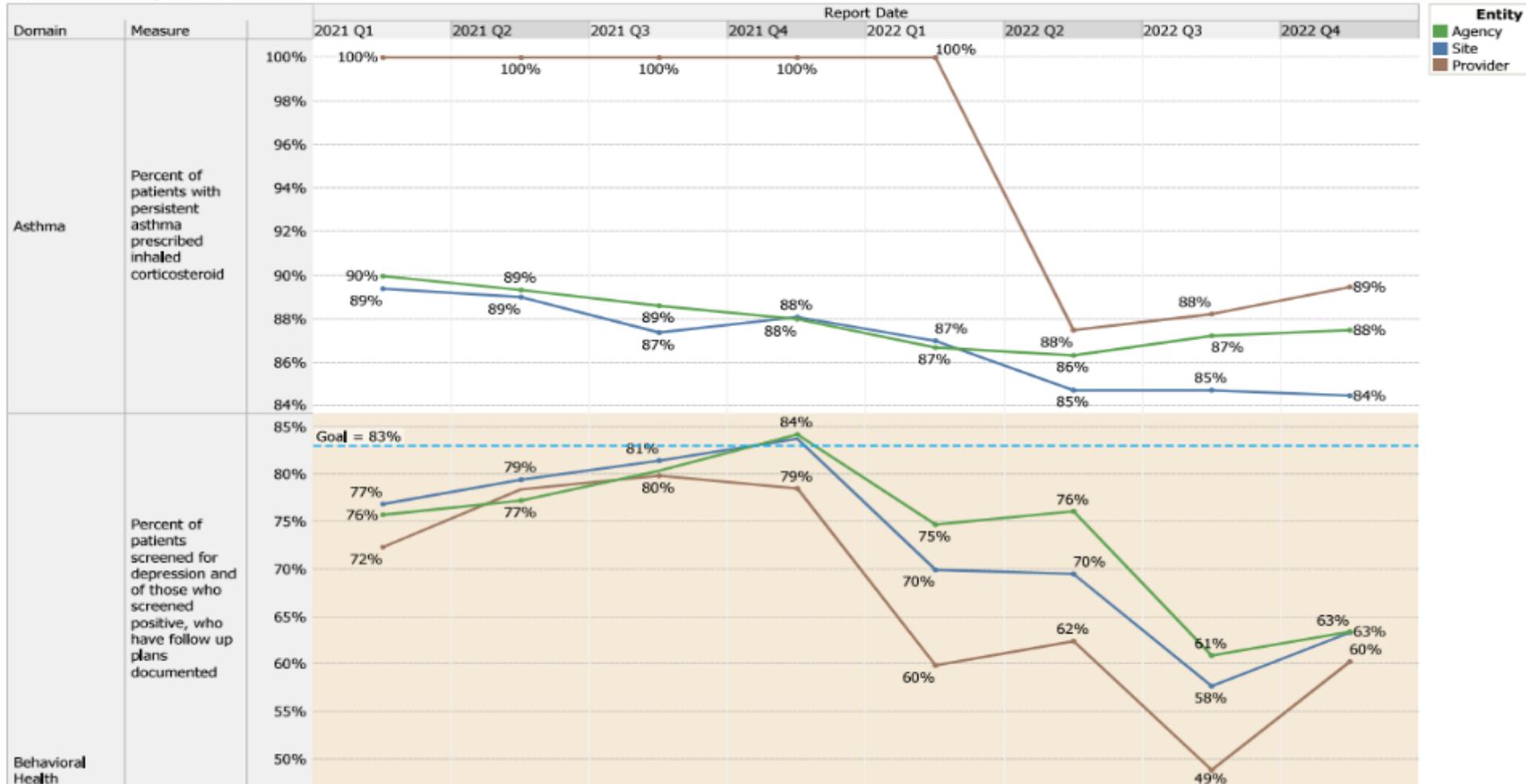
- *An overview of Quality Improvement (10/9/25)*
- *Care Observations & Stakeholder Considerations (10/23/25)*
- *Organizing your Improvement Project (11/13/25)*
- *Global Aim and Fishbone Diagram (12/11/25)*
- *Process Mapping (Flowcharts) (1/8/26)*
- *Measurement to Inform Change (1/22/26 & 1/29/26)*
- *An Approach to Testing a Change (2/12/26)*
- **Communication about your Improvement Effort (2/26/26)**
- Stakeholder Analysis & Conflict Management (3/12/26)
- Managing Up and Gaining Leadership Buy-In (3/26/26)
- Negotiation (4/9/26)
- Negotiation and More About Cycles of Change (4/23/26)
- Sustaining your Improvement Effort (5/14/26)
- Resident Presentations (5/28/26, 6/11/26, 6/25/26)



Previous Year Example

Chronic Disease Management Quarterly Report Fal APRN, Jillian FP RESIDENT - Middletown

Report Data is Through: 12/31/2022 Date Run: 1/11/2023



Data Display Options

- Although displaying data over time (run charts and time plots) can be very helpful in a QI effort, it is not the only option
- Other helpful options
 - ✓ Bar charts
 - ✓ Pie charts
 - ✓ Tables
 - ✓ Infographics

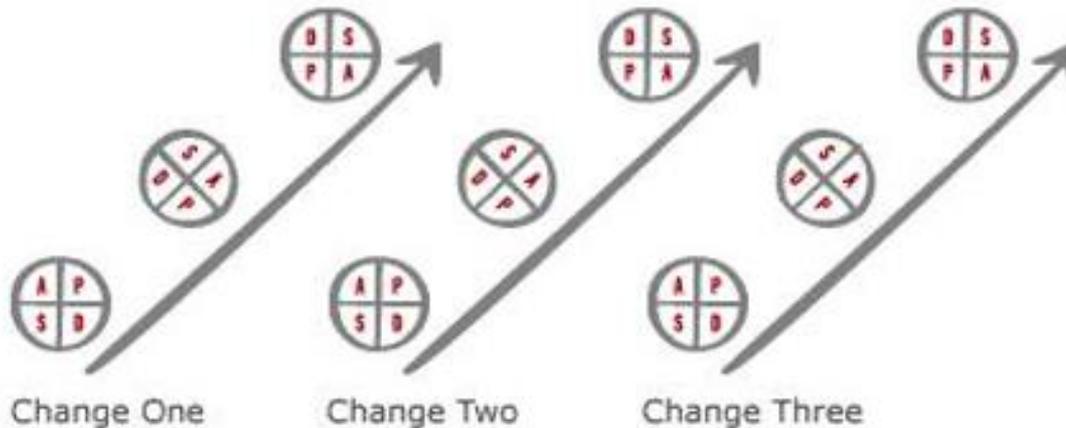


Testing for Improvement Case Study

<https://www.hrsa.gov/sites/default/files/quality/toolbox/508pdfs/testingforimprovement.pdf>

The Problem

Redline Health Clinic (RHC) provides primary care services in a rural community. The RHC Quality Improvement (QI) team monitors several quality care measures. Recently, the QI team noticed that many adult patients were not receiving appropriate influenza vaccinations per the adult immunization guidelines. The QI team met and reviewed the information collected from the practice management system. In analyzing data on adult influenza vaccinations, the team noted only 50 percent of patients aged 50 to 64 years received the influenza vaccine. This finding concerned the QI team, because annual influenza epidemics are a leading cause of death in the United States adult population. Given the risk for adults who do not receive influenza vaccinations, the team decided to focus its improvement efforts on increasing the rate of adult patients receiving an influenza vaccine. The QI team decided they would begin by setting a goal or an aim for the improvement project. The team reviewed State statistics when setting its goal and came up with the following aim statement:



Adapted from Institute of Health Care Improvement

Figure 1.3 Linked Multiple PDSDA Cycles to Test Improvement in Adult Influenza Vaccination Rates

- Change 1 – initial query of patients
- Change 2 – develop scripting for MA's
- Change 3 – provider education about vaccine risks and benefits
- Change 4 – educate staff



PDSA Case Study

Any questions or issues about the case?



CHC PMHNP Plan Example

PDSA Worksheet for Testing Change

Date:	2/23/26
Team Members:	Steve Li, Gabriela Disla Suarez

Aim: >75% of new psychiatric intakes will include documented sleep screening and follow up brief sleep hygiene education with handout distribution for patients with depression/anxiety.

Every goal will require multiple smaller tests of change

Describe your first (or next) test of change:	Person Responsible	When to be Done	Where to be Done
Test whether providing a one-page sleep hygiene handout and 2-minute verbal education during initial psychiatric visits is feasible and acceptable.	Steve/Gabriela	Next 3 intakes	CHC

Plan

List the tasks needed to set up this test of change	Person Responsible	When to be Done (Dates & Timeframe)	Where to be Done (Site Location, Where at the site, Pod, etc.)
Finalize 1-page sleep hygiene handout	Steve/Gabriela	Feb 27th	Home / Clinic
Create 1 standardized sleep screening question in template	Steve/Gabriela	Feb 27th	EHR template
Decide on documentation phrase (smart phrase)	Steve/Gabriela	Feb 27th	EHR
Identify next 3 eligible new intakes	Steve/Gabriela	March 2nd	Clinic
Track data (sleep hours + handout given Y/N)	Steve/Gabriela	March 2nd	Clinic

CHC Hartford Plan Example

PDSA Worksheet for Testing Change

Date:	2/26/26
Team Members:	Seren Carpenter, Rebecca Jenschke

Aim: Increase provider knowledge regarding community resources for car seats

Every goal will require multiple smaller tests of change

Describe your first (or next) test of change:	Person Responsible	When to be Done	Where to be Done
Administer a Pre/post survey (likert-scale) for CHC Hartford providers before and after education intervention. Higher likert-scale scores correlate with improved confidence/knowledge	Becky/Seren	TBD	CHC Hartford Provider Conference Room

Plan

List the tasks needed to set up this test of change	Person Responsible	When to be Done (Dates & Timeframe)	Where to be Done (Site Location, Where at the site, Pod, etc.)
1.) Determine what resources are around for car seats in local community	Becky	2/28/26	Virtually
2.) Compile an updated file with resources to provide CHC Hartford providers	Becky	2/28/26	Virtually
3.) Create a pre-post survey for providers	Seren	3/30/26	Virtually
4.) Create an education session/module with the list of resources for providers	Seren/Becky	4/30/26	Virtually
5.) Schedule a meeting, let providers know of meeting	Becky/Seren	4/30/26	
6.) Administer Pre-survey at beginning of meeting	Seren	4/30/26	CHC Hartford
7.) Present education session to providers at lunch and learn	Becky/Seren	4/30/26	Conference Room CHC Hartford
8.) Administer post-survey immediately after education session	Seren	4/30/26	Conference Room
9.) Evaluate survey responses	Becky/Seren	5/15/26	Virtually
10.) Administer post-survey 1 week after education session	Seren	5/30/26	Virtually/Conference Room

Yakima NHS PDSA Example

PDSA Worksheet for Testing Change

Date:	02/19/2026
Team Members:	Laura Iniguez, Heather Cook

Aim: The aim is to improve the quality and value of education and treatment related to type 2 diabetes for our patients with subtherapeutic A1Cs.

Every goal will require multiple smaller tests of change

Describe your first (or next) test of change:	Person Responsible	When to be Done	Where to be Done
Offering referral to pharmacy if the patient meets requirements for needing higher level T2D management	Providers (Laura, Heather)	During their office visit	Clinic

Plan

List the tasks needed to set up this test of change	Person Responsible	When to be Done (Dates & Timeframe)	Where to be Done (Site Location, Where at the site, Pod, etc.)
<p>Determining criteria for DM patients who meet criteria for pharmacy referrals (established criteria are T2D diagnosis, A1C unchanged or worse despite 3 months of optimal treatment / includes nonadherence)</p> <p>Providers recognizing and referring diabetic patients who meet criteria to pharmacy.</p> <p>Pharmacy taking over DM management.</p>	<p>Provider</p> <p>Patient</p> <p>Pharmacy</p>	<p>During office visit assessing if patient meets criteria.</p> <p>Pharmacy managing diabetes and getting patients to therapeutic A1C levels by 6 months.</p>	<p>Clinic</p> <p>Pharmacy</p>

PDSA Example (2023)

PDSA Worksheet for Testing Change

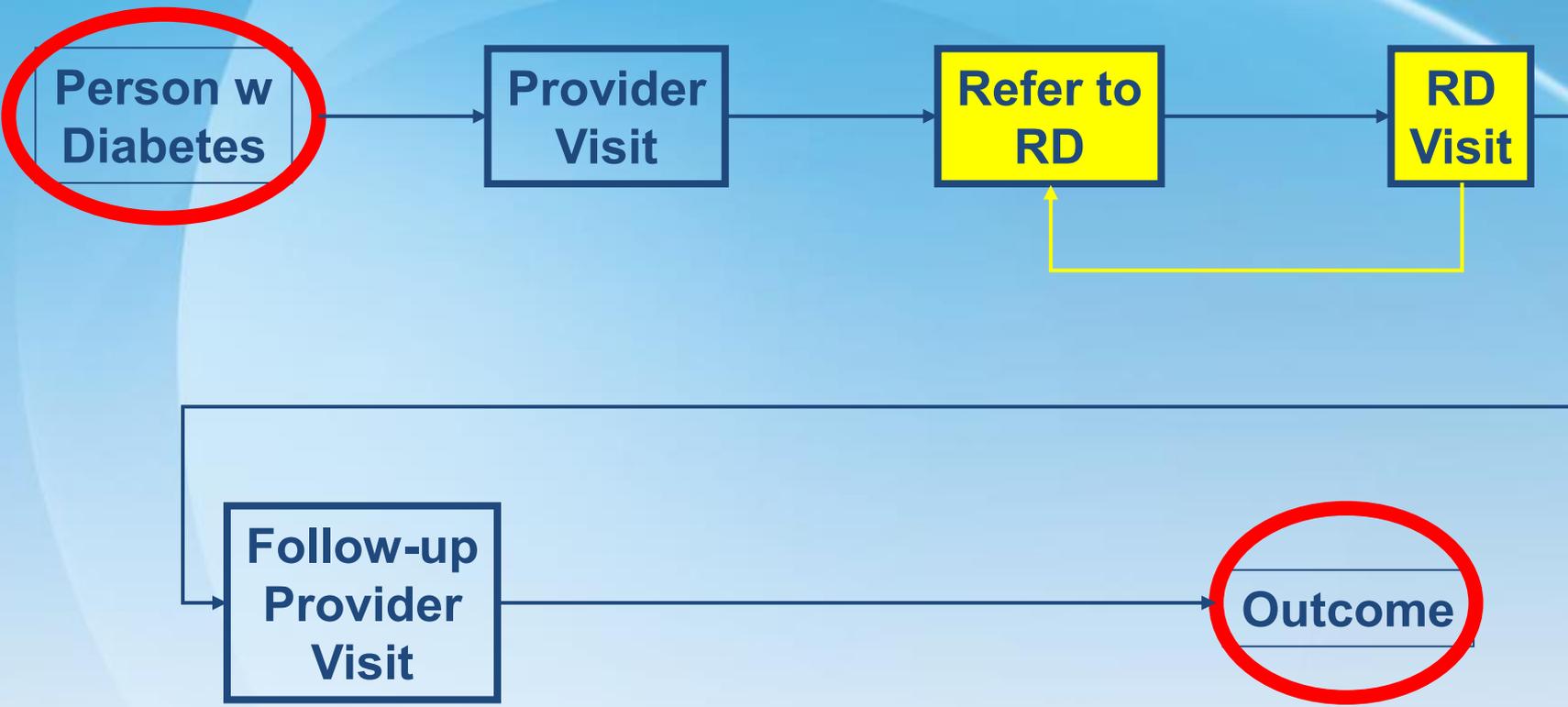
Date:	2/13/2023
Team Members:	Jennifer Booth, Emily Bittner, Lauren Cotton, Kelechi Okwaraji

Aim:

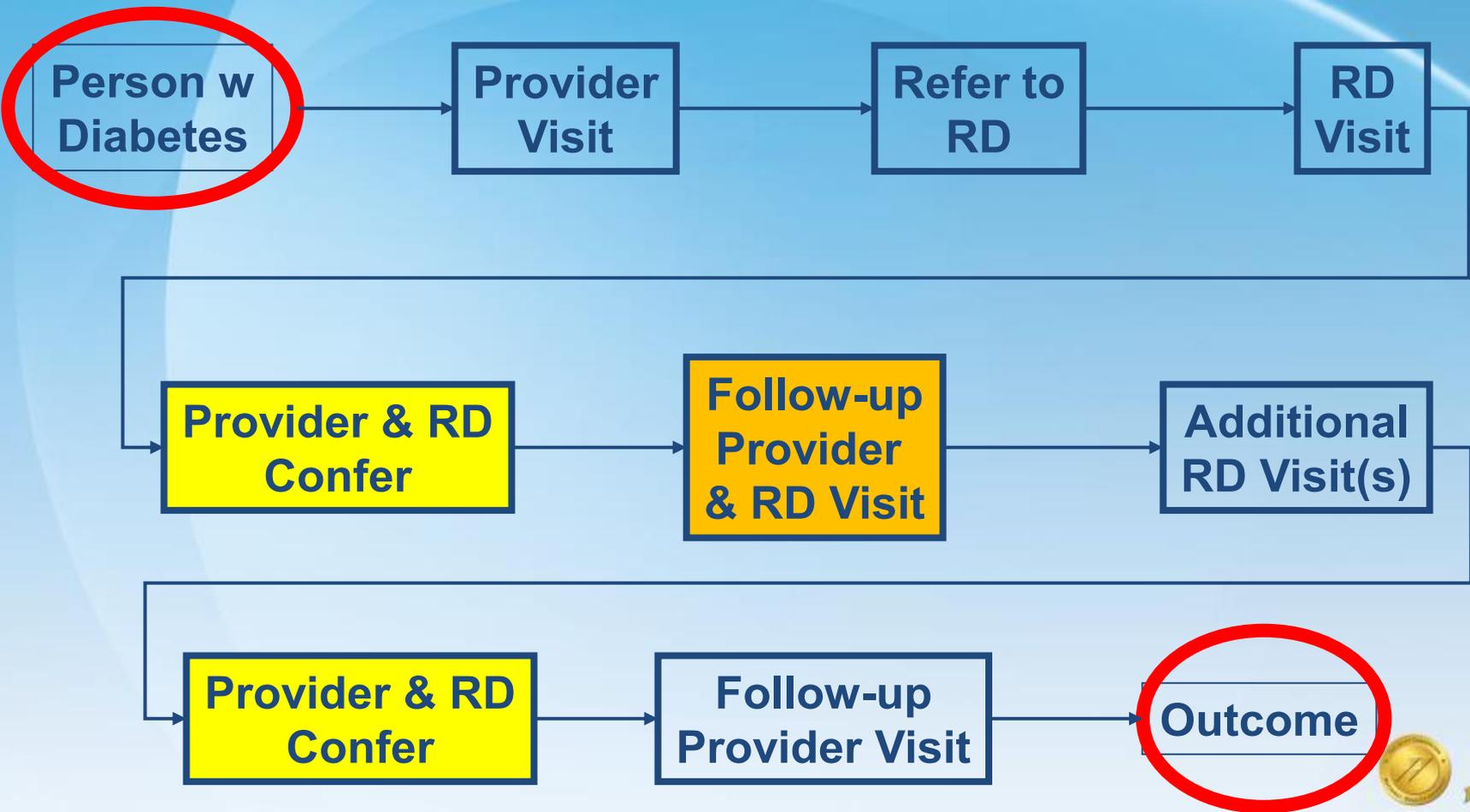
Every goal will require multiple smaller tests of change

Describe your first (or next) test of change:	Person Responsible	When to be Done	Where to be Done
<p>Our test of change is referring all diabetic patients to the Registered Dietician and seeing if the referral has a positive impact on their weight and A1C.</p> <p>By project's end, we aim for 75% of our referred diabetic patients to have participated in a nutrition consultation, and at least 25% of those patients will have experienced positive weight and A1C changes.</p>	<p>-Jennifer Booth, FNP-C -Emily Bittner, FNP-C -Lauren Cotton, DNP, PMHNP-BC -Kelechi Okwaraji, PMHNP-BC -Denise Groothius, RD</p>	<p>June 2023</p>	<p>-Stamford Fifth Street</p>

Using a Flowchart to Show PDSA



Possible Additional PDSA's

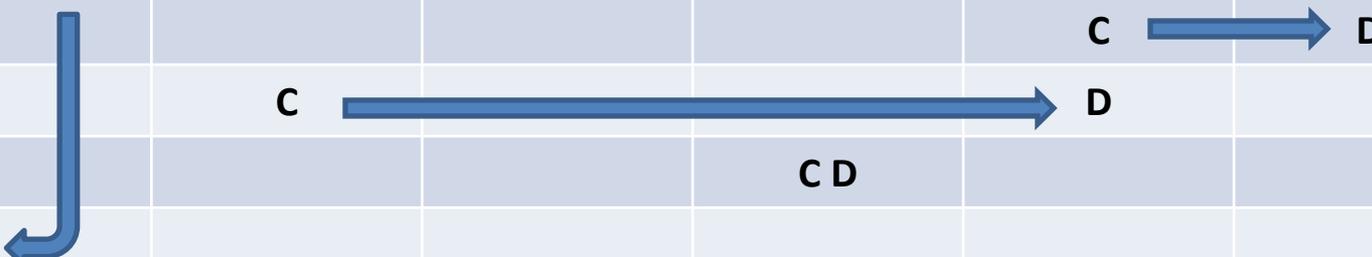


Additional thoughts on stakeholders



Stakeholder Analysis

Stakeholder	Strongly against	Moderately against	Neutral	Moderately supportive	Strongly supportive
Providers				C	D
IT	C				D
HR			C D		
Nursing					
Reception					
Other stakeholder					



How to use this tool

1. Plot where individuals currently are with regard to change (C = current)
2. Plot where individuals need to be (D = desired) in order to successfully accomplish change. Identify gaps between current and desired with horizontal arrows.
3. Indicate which individuals may influence others by drawing arrows between them.
4. Action steps for closing gaps will be discussed in the "Influencing Strategy."

Not all stakeholders need to be "strongly supportive" for successful change



Stakeholder Analysis Example

Stakeholder	Strongly against	Moderately against	Neutral	Moderately supportive	Strongly supportive
Providers		C		D	
PSAs				C	D
Patients			C		
Nursing				C	D
Medical Assistants			C		D
Finance				CD	
IT				CD	
Jane Smith			C		
Dental		C			D
Behavioral Health		C			D
Senior Leadership				C	D
Trainers/HR			C		

Current State = **C**

Desired State = **D**



Prioritization Matrix



Communication Plan

Audience	Communication Objectives	Message(s)	Media & Methods	Timing & Frequency	Who/When Where

Media Method Examples to Consider:

- Email.
- Newsletter.
- Teleconference.
- Notice boards.
- CEO briefing.
- Posters.
- Lunchtime meeting.
- Intranet article.
- Launch event.
- Team meeting.



What haven't we figured out yet?

Questions or issues that remain unclear?



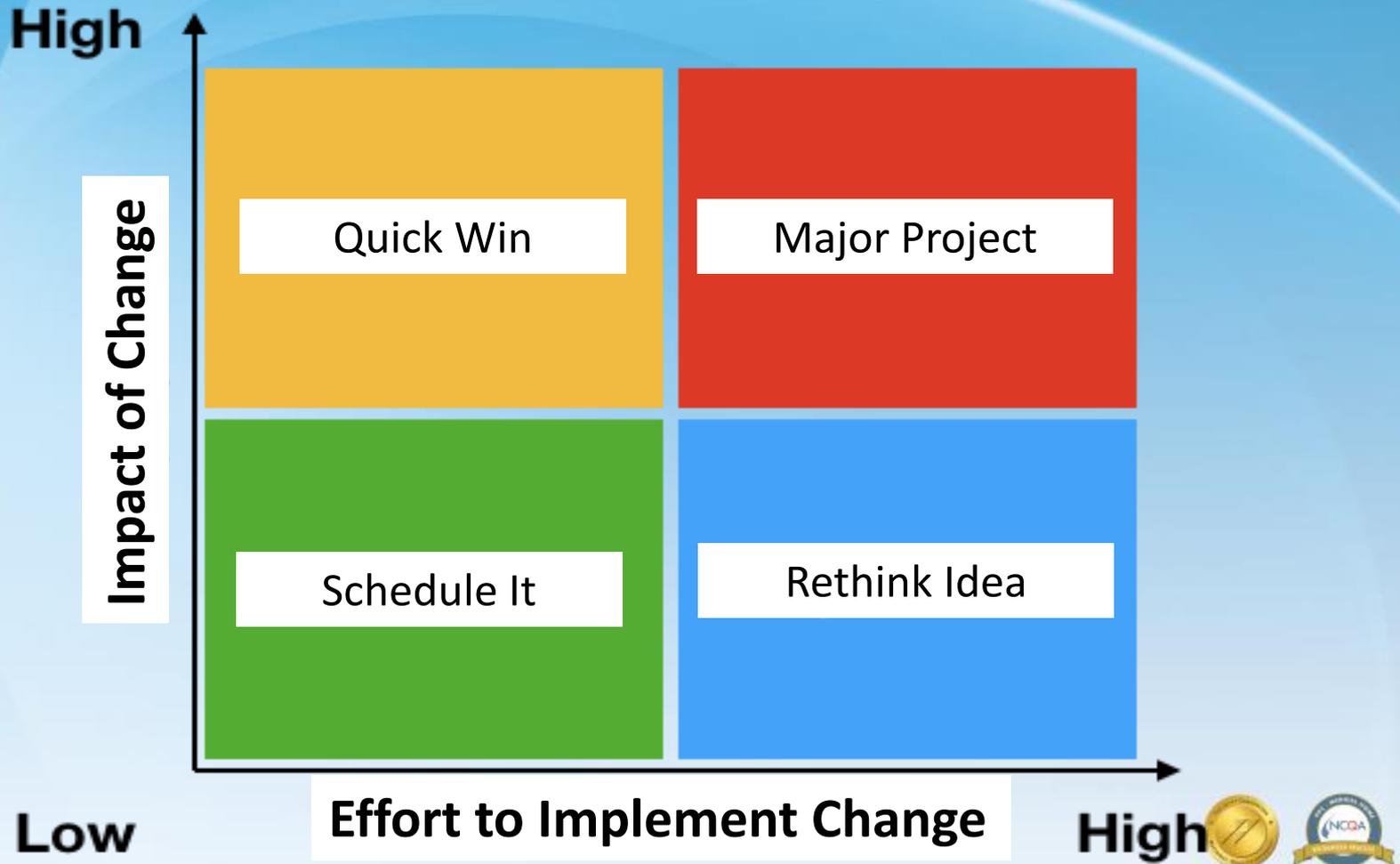
Change Can Be Hard

“The status quo feels comfortable and steady because much of the choice has been squeezed out. You have your routines, your ways of doing things.”

Chip Heath, [Switch: How to Change Things When Change Is Hard](#)



Impact/Effort Matrix (Grid)



Summary

- Many people approaching an improvement effort underappreciate the importance of the Plan step of the PDSA cycle.
- The fishbone diagram can be a helpful tool for brainstorming ideas for possible changes to test. Once generated, you can prioritize the list of change ideas and begin testing those of highest priority.
- Input from stakeholders is critical throughout any improvement effort. It is particularly informative when selecting an effort, developing an understanding of a process, and considering what change to test.
- Because stakeholder input is important throughout an improvement effort, it is useful to have a strategy for communicating with stakeholders.



Session X Assignment

- Interview a stakeholder for your planned change with whom you have not had regular interaction regarding the change
- Use the template we used today to guide your interview (see separate Word document)
- Contact Mark or Emma if you have questions
- Be prepared to discuss your interview next session on 3/12/26

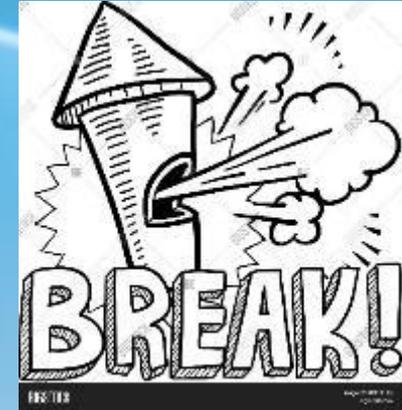


Project Presentations (May/June)

- Each team will create a presentation that summarizes where their project stands to help all of us learn from their experience.
- Options for the presentation:
 - A summary of your team's QI project to date
 - A topic that you found particularly helpful in our QI seminar series and how you have used this information in your work
- Each team should sign up (by May 8th) for a date to present and confirm their topic.
- A template of slides you can consider using to build your presentation is posted on the WEP.



Break!



Take five minutes to recharge and refresh.

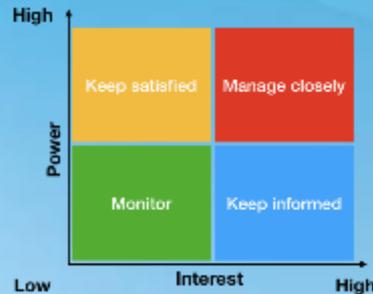


Small Group Discussion

- We will use Zoom Breakout Rooms to allow you to gather as a project team
- You will discuss the questions on the following slide related to a stakeholder for your project (also see the Word document template)
- Answer as many of the questions as you are able
 - ✓ Have one member of your team record the answers



Stakeholder Considerations



- What is their level of interest in the project and/or test?
- What is their level of influence on the project and/or test?
- How do they want to contribute and be involved in the project?
- What are their expectations for this project or test of change?
- What challenges do you predict might come up regarding this stakeholder?



References

- HRSA.org - Health Resources and Services Administration, agency of U.S. Department of Health and Human Services, Rockville, Maryland: Testing for Improvement
- American Society for Quality. Impact Effort Matrix. <https://asq.org/quality-resources/impact-effort-matrix?srsltid=AfmBOopM6HMJcYbOuy1ZaPAFm4y3FJl06OH4xjTdvKAgCURR2RD7DW0A> (Accessed February 24, 2025)

