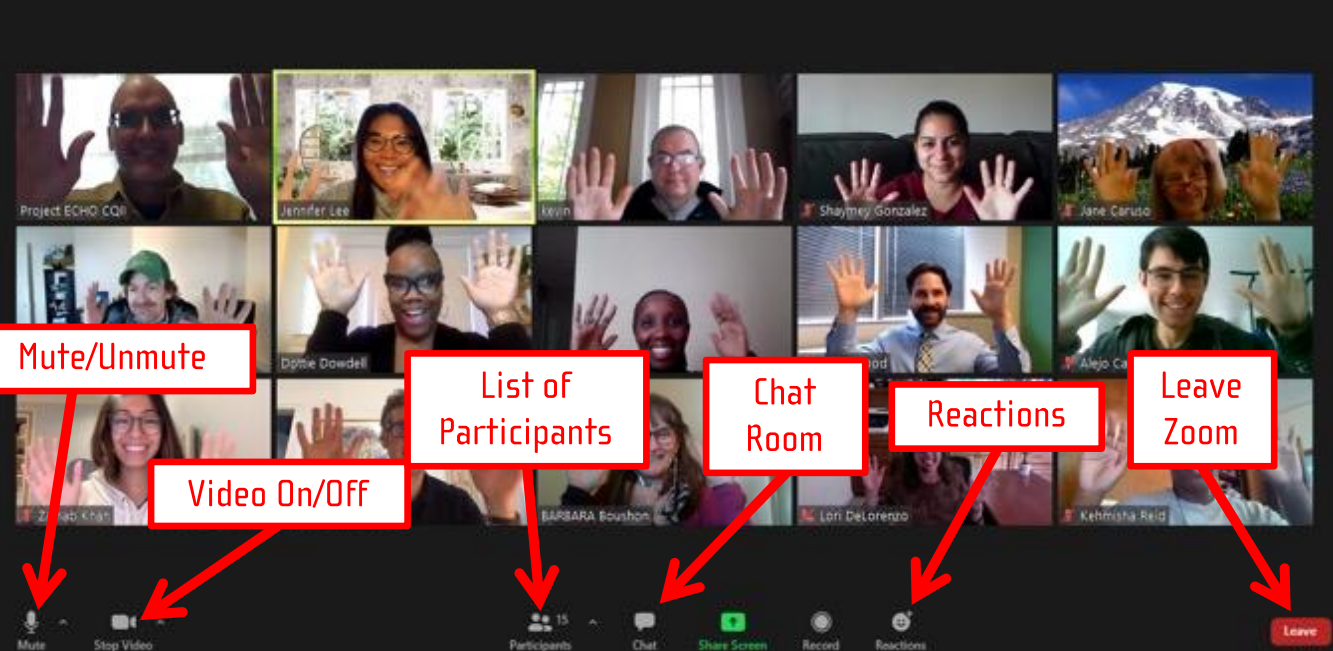QI Bootcamp:

Class 5: Evaluating and Sustaining Your
QI Project and Writing a QM Plan

Reminder about Basic Zoom Functions

Good Practices for Zoom Participation

+ **Re-label your Zoom tile** to state your name

+ **Keep video on** and mute your line when needed

+ **Use the chat room** to ask for clarifications, post questions, or share your wisdom

Please be reminded that we will record our session for later replay!

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Picture Consent

- You allow us to take pictures from our training events and post them on SharePoint
- You have the right to revoke your consent for pictures that are publicly posted
- At no time will individual names be used to identify you, unless you sign the appropriate release form

Learning Objectives for Today

- Sustaining your gains
  - How do you maintain your improvements?
  - How do keep the QI efforts moving forward?
- Evaluating your QI efforts
  - How do you know your QI project was successful?
  - How can you learn from your QI team members
- The basics of the quality management plan

Evaluating Your Improvement Project

Evaluating Your QI Project

- You are actually continually evaluating your QI project with every iterative PDSA Cycle

- You take a measurement before your first Cycle (baseline), and a measurement after your first Cycle, and evaluate that initial change

- Based on that measurement you either tweak the change or you increase the scale of your test of change; then you measure again, compare to previous measures, and evaluate the results

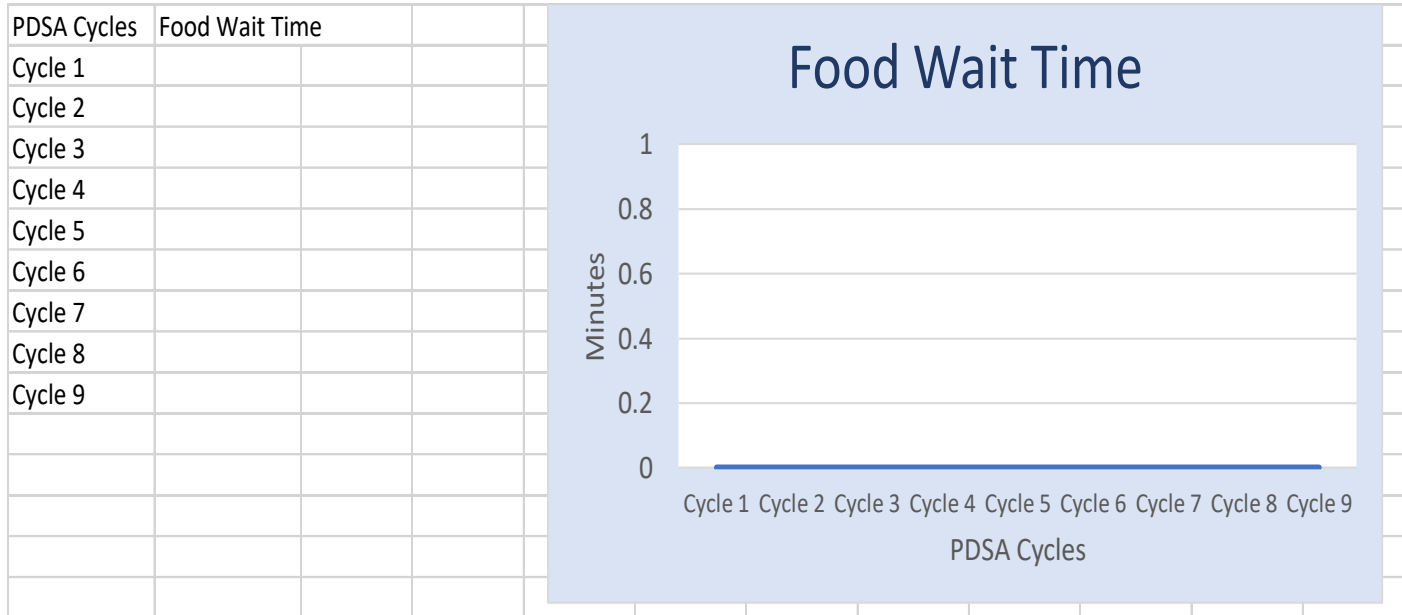- Continuously test and measure your tests until you reach and maintain your goal

Evaluating Your QI Project

- You started out with an Aim Statement

- You developed measures within the Model for Improvement (Step 2)

- You conducted tests of change in multiple PDSA Cycles

- You have the data to evaluate the success (or failure) of your project

- You learn from both success and failures and apply them to future activities
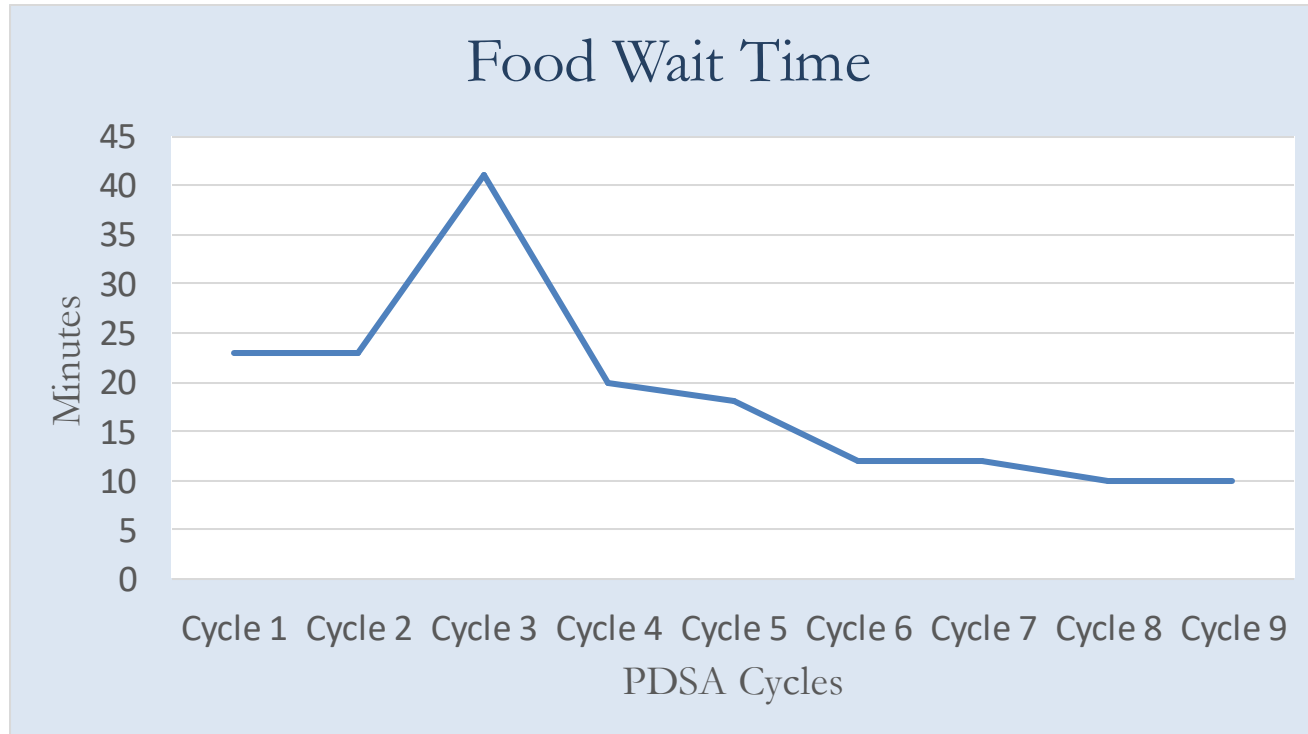
Tools to Guide Your Evaluation

- Run Charts
  - It shows the progress (or lack of progress) over time
  - You can set up a template to automatically update your charts with each measure

- Pre and Post Surveys
  - Compare what your customers think before your intervention implementation to what they think when you have completed it

- …and so many more

Using A Simple Excel Template

PDSA Cycles	Food Wait Time					
Cycle 1						
Cycle 2						
Cycle 3						
Cycle 4						
Cycle 5						
Cycle 6						
Cycle 7						
Cycle 8						
Cycle 9						

Food Wait Time

Minutes

1
0.8
0.6
0.4
0.2
0

Cycle 1 Cycle 2 Cycle 3 Cycle 4 Cycle 5 Cycle 6 Cycle 7 Cycle 8 Cycle 9

PDSA Cycles

Run Chart

Customer Survey

Design a BRIEF survey to see how your customers feel about your service. Use the same questions and ask them before the change idea is implemented and then again after you have reached and maintained your goal.

How strongly do you agree or disagree with the following statements?
Using a scale of 1-5 where 1 is Strongly Disagree and 5 is Strongly Agree,
circle the number that most closely matches your response.

When I arrive in the restaurant, I am seated immediately.

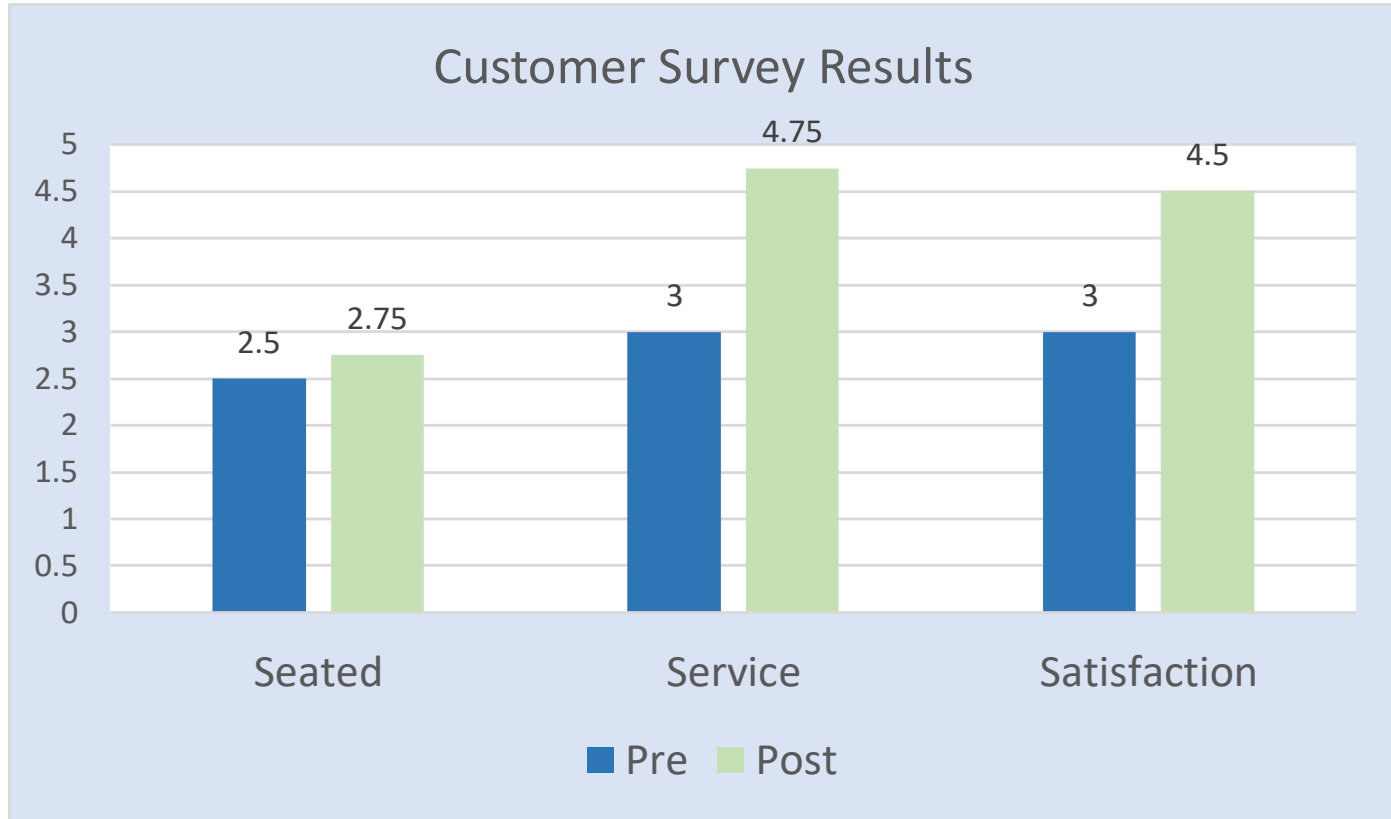| 1	2	3	4	5

I receive my meal quickly, in 10 minutes or less.

1	2	3	4	5

I am completely satisfied with the overall service of the food in this restaurant.

1	2	3	4	5

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Six Questions To Ask
When Evaluating Your Quality Improvement Project

1. Did the Project Achieve Its Aim?

- How do we know if we achieved our Aim?

- Remember, the Aim Statement has specific targets and timeframes

2. Was the Project Well Documented?

- What does well-documented mean to you?

- Can another person recreate this project based on your documented steps?

3. Was the Project Feasible?

- Were the expectations reasonable and realistic?
- Did you have enough
  - Time? (Did it take longer than expected?)
  - Staff and support?
  - Funding
- What else adds to feasibility?

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4. Did Key Staff Members Buy-in to the Project?

- If not, why not?

- Who should be there?

  - Why is this important?

  - What mind sets, skill sets, or professions

  - What kind of representation?

  - Did you choose the correct members to participate?

  - Did you use something like the [Team Member Selection Characteristics](#) matrix as a guide?

5. Did We Hear the Consumer's Voice?

- If you did, how did it happen?

- What role did the consumer play?

- Was the consumer equipped to participate?

6. Did the Project Result in Permanent Change for the Organization?

- How would you know if this happened?

- Have you thought about indicators that would reflect the change in organizational behavior?

- Focus on one or two indications that the change was permanent

Sustaining Your Gains

Sustainability Factors

- Based on "Sustaining Improved Outcomes: a Toolkit" by Thomas, S.; Zahn, D. (2010). Sustaining Improved Outcomes: a Toolkit
  - https://nyshealthfoundation.org/wp-content/uploads/2017/11/sustaining-improved-outcomes-toolkit.pdf
- You do not need to use all 12 factors; choose which ones make the most sense for your organization
- Use their worksheet and tools to choose

*

Sustainability Factors

- <u>Perceived Value</u> - Acknowledged value by those affected by the new ways of working and improved outcomes

- <u>Monitoring and Feedback</u> - Information on improved outcomes is collected and communicated to target audiences

- <u>Leadership</u> - The degree to which leaders, including decision-makers and champions, are *actively* engaged in the implementation stage and beyond

- <u>Staff</u> - Staff have the skills, confidence, and interest in continuing the new ways of working and improved outcomes

- <u>Shared Models</u> - Continued use of a shared model among those involved in the new ways of working

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Sustainability Factors

- <u>Organizational Infrastructure</u> - Degree to which organizational operations support the new ways of working and improved outcomes

- <u>Organizational Fit</u> - Degree to which the new ways of working and improved outcomes match the organization's overall goal and operations

- <u>Community Fit</u> - Degree to which the new ways of working and improved outcomes match the communities' interests, needs, and abilities

- <u>Partners</u> - Involvement of partners who actively support new ways of working and improved outcomes

- <u>Spread</u> - Expansion of new ways of working and improved outcomes to additional locations

- <u>Funding</u> - Funding beyond original project period

- <u>Government Policies</u> - Degree to which new ways of working and improved outcomes are supported by government policies

* Thomas, S.; Zahn, D. (2010). *Sustaining Improved Outcomes: a Toolkit.* https://nyshealthfoundation.org/wp-content/uploads/2017/11/sustaining-improved-outcomes-toolkit.pdf

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Quality Management Plan

What is a QM Plan?

- A Quality Management Plan is a written document that outlines the program-wide HIV quality program, including a clear indication of responsibilities and accountability, performance measurement strategies and goals, and elaboration of processes for ongoing evaluation and assessment of the program.

- At least annually review and update the QM Plan as necessary

QM Plan Expectations – RW Part B Quality Standards

- The Ryan White Part B-funded service provider has a written quality management plan that is reviewed and updated annually

- The plan is shared with staff and clients to gather input and to promote involvement in the quality improvement activities

- The quality management plan includes a workplan that identifies implementation responsibilities and a timetable for their completion

  – *RW Part B Quality Management Plan Review Tool*

QM Plan Expectations – RW Part B Quality Standards

- The plan includes the following elements:
  - Quality statement describing the overall mission of the QI activities
  - Annual improvement goals based on identified gaps
  - Quality infrastructure
    - how staff are involved in improvement efforts, including the agency leadership
    - how the Part B QM committee is set up and evaluated
    - how people with HIV are involved in QI activities
  - Performance measurement activities describing indicators and data collection methodologies
  - QI projects and the routine reporting of QI project updates

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Agency's QM Plan

- Your Part B QM plan should reflect your Part B-specific quality improvement goals

- You can either integrate the Part B QM plan as a sub-set of the agency's QM plan or write a stand-alone Part B QM plan

- The QM plan should reflect all service categories for which the agency is funded

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Available Part B QI Resources

Tool	Details
Part B Quality Management Program Standards	To learn about the Part B QM Standards that are applicable to HIV service providers that receive Part B funding in New York State
QM Plan Review Tool	To help with the development of future QM plans, the review of existing QM plans, and for providing feedback and guidance by internal and/or external stakeholders
Organizational Assessment Tool for Part B Service Providers	To identify all essential elements associated with a sustainable QM program and is in keeping with the Part B QM Standards and HRSA guidance, such as PCN 15-02

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Some Tips to Write and Update QM Plans

- Tip - 80% planning, 20% writing (old software programming rule)
- Tip - Don't reinvent the wheel; ask for a sample from your peers to get started
- Tip - No plan is complete until it addresses consumer input
- Tip - The perfect is the enemy of the good (A "perfect" plan was probably written by a consultant and nobody has a clue what it says)
- Tip - Plans are only as good as their implementation
- Tip - If you haven't changed the plan throughout the year, you probably haven't looked at it

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To Get Going…

- Share your QM Plan with your QM committee (providers and consumers) and get their input
- Share your QM plan with your AIDS Institute QI Contact and get feedback
- Use the QM Plan Review Tool and review your QM Plan against it

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Aha Moments and Wrap Up

Overall Bootcamp Reflections

- What worked particularly well?
  - What did I learn about the QI process that should be applied to the next QI project?
  - What was embraced by the organization?

- What should we have done differently?
  - What were the challenges along the way and how do you avoid them next time?
  - What else do we need to offer
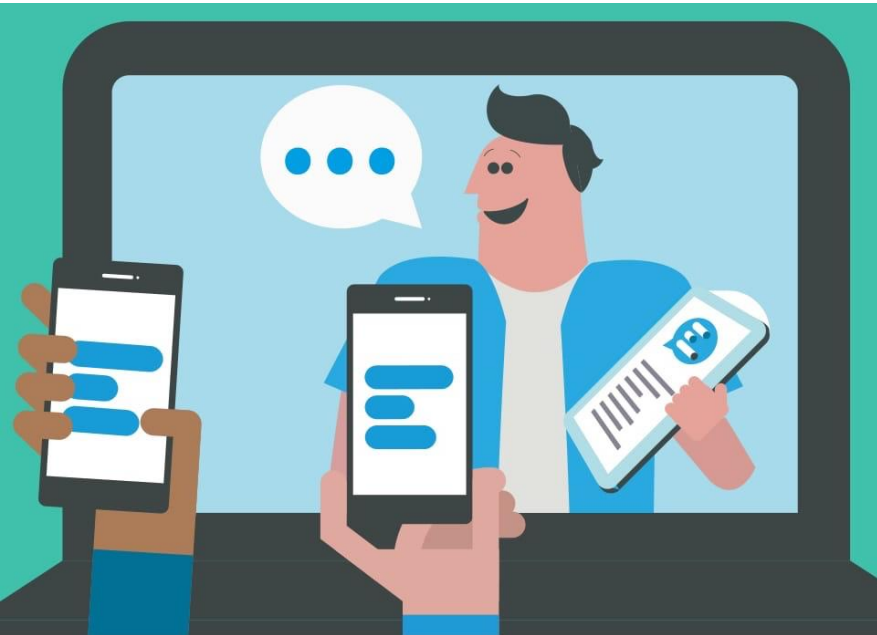 - Was the coaching time enough to help you understand the lessons?

Time for Some Polling Questions
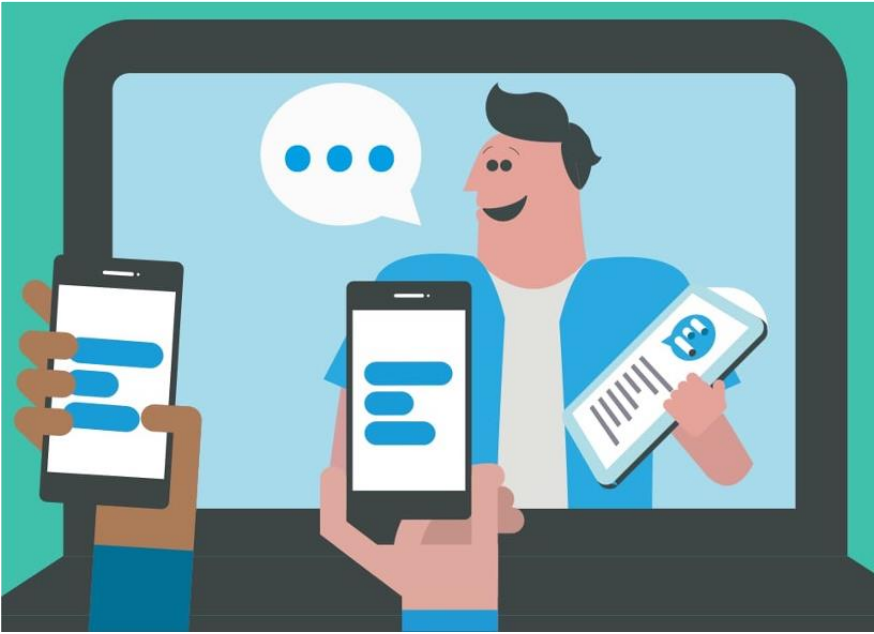
How helpful was today's session to learn about quality improvement?
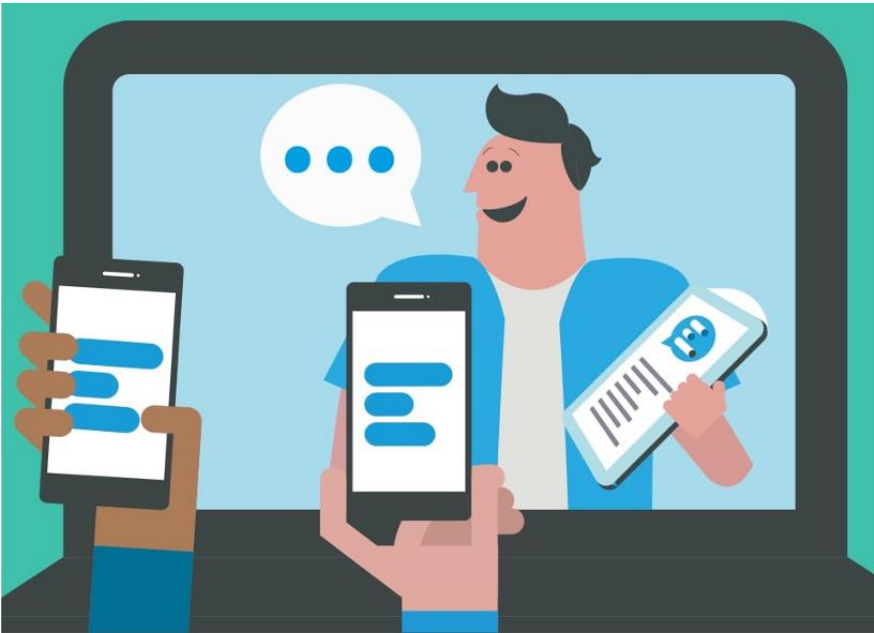
[Select one]

Time for Some Polling Questions

How engaged were you in today's session?

[Select one]

Time for Some Polling Questions

How likely will you implement the lessons learned of this session when working with your programs?

[Select one]

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