Involving Consumers in Quality Improvement

July 2022

Learning Outcomes

- Participants will understand why consumer involvement is a key element for high quality services
- Learn strategies to meaningfully engage consumers in QI activities.
- Understand the principles of voice of the consumer techniques
- Gain strategies for how to utilize qualitative consumer input to implement QI projects.

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Reflect on your most recent healthcare experience . . .

Rate this experience and think about why you scored the visit the way you did . . .
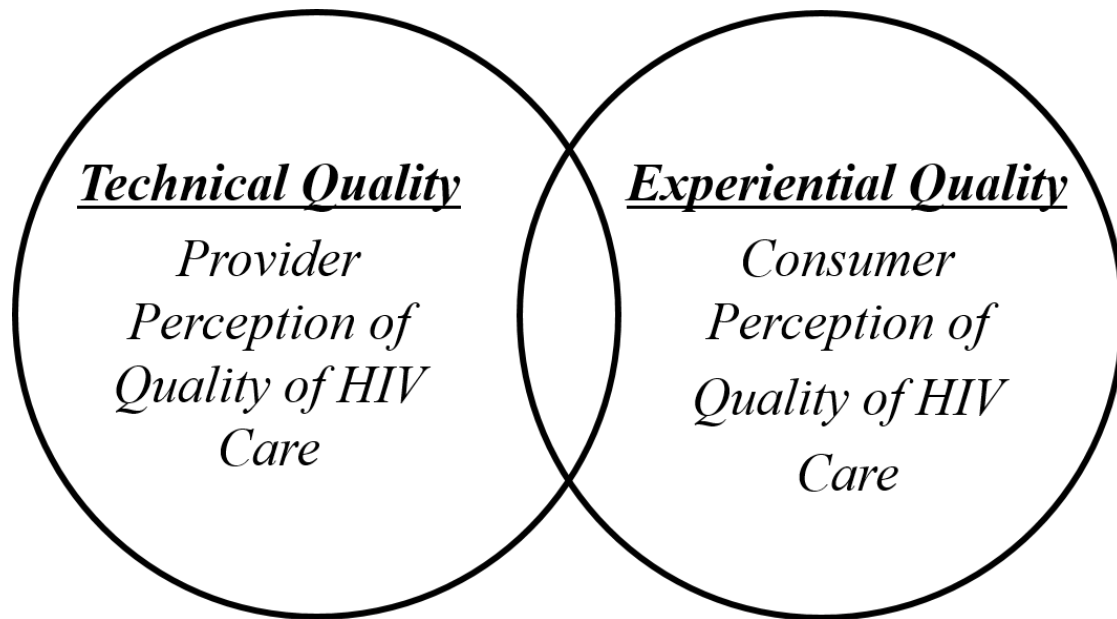
Quality of Care

The degree to which health services for individuals and populations increase the likelihood of desired health outcomes and are consistent with current professional knowledge.

- Institute of Medicine

Institute of Medicine. Lohr KN, editor(s). Medicare: a strategy for quality assurance. Vol. 1. Washington (DC): National Academy Press; 1990 May. p. 21.

Dimensions of Quality

Technical Quality

Provider Perception of Quality of HIV Care

Experiential Quality

Consumer Perception of Quality of HIV Care

Leonard Berry, Texas A&M University, IHI conference 2001

Why Involve Consumers in Quality?

- Data is important to the technical component of quality - Consumer input gives us information about the experiential component
- Utilizing consumer input is good for consumers:
  - Consumers feel their voice is valued and heard
  - Feel like they are part of the solution in their communities
  - Can make a difference beyond what they can do alone
- Improvement strategies are more likely to be successful with buy-in from the people that they most affect
- Providers and consumers making things better together - benefits everyone!
- It's Required!

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Benefits for the QM Program

- Bridges the gap between perceived needs and actual needs of clients
- Promotes greater communication
- Decisions/changes become more credible
- Challenges the status quo
- Increases accountability
- The greater the diversity in QI, the harder it becomes for a single perspective/philosophy to guide actions
- Identifies service barriers and issue not thought of by staff and teams
- Helps to design improvement strategies that "stick"

Benefits for the Consumer

- Enhances the climate of partnership
- May serve to increase consumer involvement in personal healthcare and in advocating for others
- May also have positive effects on:
  - health outcomes
  - health promotion
  - disease prevention behaviors

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How do we involve consumers in <u>meaningful </u>ways in QI?

First a shift in Perspective…

- Shift clinician's/staff role from professional expert (instructing and deciding) to guide (supporting, advising, and navigating)
- Embrace the concept of client/patient as expert:
  - Consumers are the largest untapped resource in the health care system
  - Our systems should recognize consumers and their families as valuable producers and participants, not just receivers of care
- Set the expectation that the healthcare/social service systems be designed around consumer needs instead of expecting them to conform to our systems

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Meaningful Consumer Involvement in QI

- Steps to take:
  - Formalize consumer involvement as members on the quality management committee and on quality improvement teams
  - Link QM activities to the CAB and other standing meetings/groups with clients
  - Train consumers in quality
  - Have consumers actively review performance data and quality improvement activities
  - Routinely assess consumer involvement in QI

Building Meaningful Consumer Involvement In QI Best Practices

Training for consumers and providers on both QM topics and interacting together.

Develop policies for staff and consumers

Addressing the barriers – Root cause analysis!

Sharing and celebrating success and particpipation

Publicizing opportunities

Involving consumers in decision-making roles

Utilizing consumers affiliated with the organization formally i.e. employees, board members CABs etc.

Assigning mentors, highlighting the importance of participation "to represent the many other clients whose voice needs to be heard"

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Resource: Involving Consumers at Every Step of QI

Engagement of Persons with HIV in Clinical Quality Improvement Activities

QI Step/Activity	Methods to Engage Persons with HIV (PWH)
QM Plan Development	• Invite PWH to participate in the development of the Quality Management (QM) Plan (limited engagement) • Review the components of the QM Plan & Draft QM Plan with Consumer or Community Advisory Board (CAB) or other advisory board • Publish the QM Plan and make it available to patients and clients with feedback cards
Selecting an Area of Focus	• Review agency performance data results with PWH to identify priority areas for improvement (can be a focus group or engage an existing CAB) • Validate agency performance goals with PWH (can be key informants, focus groups, or engage an existing CAB) • Use voting/polling in clinic or agency to have patients and clients votes on area of focus (can be achieved through providing stickers and placing the areas on a posterboard and have clients make selection as part of check-in or check-out
Situation Analysis	• Invite PWH to participate in strategic planning activities such as a Strengths, Weaknesses, Opportunities, & Threats (SWOT) Analysis • Ask PWH (key informants) to provide feedback for situation analysis (perceptions of the environment & situation) • Conduct a situation analysis with a focus group or an existing CAB
Aim Statement Development	• Invite PWH to the CQM meeting where the Aim Statement is being developed • Validate Aim Statement with PWH through key informants or informal focus groups • Place Aim Statement on the agency wall and ask PWH to comment or leave messages of support to the clinic and the project
Selecting Quality Measures	• Engage PWH to determine what is meaningful to measure (n.b. viral suppression might be the leading outcome measure however most projects will use a combination or process or subprocess measures for projects) • Validate Quality Measure selection with PWH by engaging CAB or other advisory board • Ask individual PWH what the most important steps or tasks are related to the area of focus (informal or formal, individuals or small groups)
Process Mapping	• Engage PWH to define the "start" and "stop" of the process from the patient journey • Engage PWH to observe the process or provide feedback on the current process • Engage PWH to generate a process map (can be as part of the CQM team, an individual or individuals invited to participate in a process mapping session, or focus groups convened to map a process) • Engage PWH to generate a touch point map of the process under review (can be informal focus groups or engagement of existing CAB or other advisory board) • Validate a process map with PWH stakeholders (informal or formal, individuals or groups, or an existing CAB or other advisory board)

Engagement of Persons with HIV in Clinical Quality Improvement Activities

QI Step/Activity	Methods to Engage Persons with HIV (PWH)
	• Annotate the process map by engaging PWH to identify touch points on the process map where the encounters produce value or where negative experiences occur • Generate word clouds to place on process map by asking PWH to document feelings or experiences related to a specific process step (intervention package available – Healthcare Stories Project)
Causal Analysis	• Invite PWH to participate in causal analysis activities (e.g., fishbone diagram, five whys, etc.) • Validate outcomes form a causal analysis with PWH (informal or formal, individuals or small groups, or a CAB or other advisory board) • Invite PWH to engage in a causal analysis activity and compare to the results from the agency causal analysis • Informally survey patients and clients during visits about potential causes to an identified problem
Problem Statement Development	• Generate problem statements from brainstorms with PWH engagement • Validate problem statements with PWH (informal or formal, individuals or small groups, or a CAB or other advisory board) • Ask PWH to generate their own problem statements following care delivery • Use qualitative methods such as photo elicitation to generate problem statements
Ideation	• Invite PWH to participate in ideation activities (e.g., brainstorming potential change ideas or interventions) • Engage PWH in selection of interventions through informed decision-making (i.e., educated on the differences between interventions, what they are measuring, etc.) • Engage PWH to investigate feasibility of tailoring or adapting intervention components • Ask PWH to generate potential change ideas following care delivery through wall postings or feedback cards
Prioritization	• Ask PWH to participate in prioritization activities (e.g., priority matrix or affinity voting) • Ask PWH to vote on potential change ideas through polling (prior to or following care delivery) • Ask PWH to place or move potential change ideas up or down on a wall for a week • Engage a CAB or other advisory boards to prioritize potential change ideas • Engage PWH, CAB, or other advisory board to evaluate and provide feedback to CQM team on potential change ideas (i.e., feasibility, appropriateness, etc.)
Planning for Change (PDSA)	• Engage PWH to identify needed tailoring or adaptations for intervention components • Engage PWH in the testing of potential change idea elements or intervention components (i.e., test new intake forms, test new screening or assessment questions, ask for feedback on materials prior to testing, etc.) • Ask PWH to support implementation by identifying process points that can be supported by or implemented by PWH • Engage CAB or other advisory board to identify key process points to

Once consumers are involved and engaged how do we gather and use their input to improve service delivery, patient/client outcomes and client satisfaction?

Consumer Participation Can Be Just as Valuable as Measures from an EMR

- If you invest in training consumers and soliciting their input about what can be improved, you need to **incorporate them and their ideas in a meaningful way!**

- Move beyond the status quo Consumers should have more than a token seat at the table, don't expect CABs just to rubberstamp leadership's improvement ideas

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Voice of the Customer (VoC) Techniques

- VoC techniques seek understand what "delights" our consumer, so that we can build our processes and systems for them
- Learn to look at a process through the eyes of customer, instead of from the service provider point of view
- Assess Value with the eyes of the customer
  - **Value stream mapping** – how much of our processes don't add value to the consumer; what are requirements.
  - What are their needs? How well are we meeting those needs?
- Critical to quality – what are the consumer expectations?
- Are we satisfying expectations? How can we go beyond expectations?

Welcome All Consumer Input

- More than just comment boxes: implement regular surveys, focus groups and foster opportunities to make consumers feel like VIPs connected your "inner circle".

- Make sure a consumer is on the team that reviews this qualitative data.

- Gather feedback that is timely and actionable, consider:
  - Concerns
  - Complaints
  - Questions
  - Suggestions
  - Ideas – What works well, what could work better, what is missing?

Routinely Collect *QI Specific* Feedback

- Get input that is directly pertinent to your QI projects
- Design a process that collects feedback quickly, and can respond quickly to consumer needs
  - Consumer needs can change in an instant and change dramatically
  - Use the right sampling methodologies and minimizing the potential for survey fatigue, consider targeted surveys to key populations.
  - Ask the RIGHT questions, not the SAME OLD questions

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How to Collect Consumer Feedback
Customer Touch Points

- When your consumers (internal/external) comes in touch with your process what do they:
  - See? (Initial reaction?)
  - Feel?
  - Sense?
  - Hear?
  - Experience?
- Consider utilizing a Gemba Walk or secret shopper to understand get the answers to these questions

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Pain, Neutral, Delight

- This technique is used to quickly separate aspects of service delivery into three categories:
    - Pain – the feature detracts from the overall experience
    - Neutral – the feature simply meets expectations
    - Delight – provides value beyond expectations
- Use process improvement tools to eliminate pain points and add delighters

How To Obtain Consumer Data

- Ask them!!
- Use: online polls, surveys, focus groups, special events, key-informant interviews etc.
- Make consumers feel important by involving them in meetings. Incorporate them into improvement teams.
- Consider how to best reach them:
  - Where to do the survey?
  - How to do the survey—internet vs. in-person?
  - What to ask?
  - Best time to do it?
  - How often to do it?

Integrating Consumer Input into QI

Consumer Survey Results:	Need	Critical Requirements	Tools for follow-up
"I like the services I received, but I can't wait all day for them."	Quicker process for visits	Efficiency, Timeliness	Flow chart, value stream map, spaghetti map
"That girl you got at the front desk is rude!"	Staff that is polite	Complaint Resolution, Training, Cultural competency	fishbone diagram, driver diagram, gemba walk, SIPOC diagram
"I want it to be easier to get the services I need—housing, insurance, and food bank"	Right services easily accessible to the right person	Accuracy, Efficiency	Flow Chart, value stream map
"I work and can never get appointments when I'm free."	Visit slots that work around their schedule	Availability	5 Whys, Control Chart, Value stream map, Driver Diagram

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Share Outcomes With Consumers

- Close the feedback loop – let consumers know the outcomes of their contributions and resulting changes
  - Have a process in place
  - Let them know that their peers are involved in the QI process and their concerns are taken seriously by folks that represent them
- Communicate to consumers, staff, and stakeholders that all consumer input receives the level of attention and response that it deserves.

Celebrate Success

- Let consumers, staff, and stakeholders all know that the voice of the consumer is a driving force in improvement activities.

- Post outcomes in waiting rooms, brochures, and on the website.

- Storyboards and testimonials are a great way to highlight individual projects or consumer journeys

Conclusions

Listening to and understanding the voice of the customer is crucial to building consumer trust and gaining their loyalty, engagement and advocacy.

To improve service delivery, consumer outcomes and consumer satisfaction, we must design our systems around consumer needs instead of expecting them to conform to us.

We must be intentional with involving consumers in QI - actively collecting and using consumer feedback regularly. That means involving them in every step of QI and meaningfully implementing consumer ideas in a timely manner.

Communication is key -- share feedback with consumers, staff, stakeholders and celebrate success loudly and proudly!