

# Workshop 2 (AIM 102)



# Recap from Workshop 1

1. Recognize the purpose, value, and applicability of the AIM program
2. List concepts of access in primary care
3. Identify the value of quality improvement, change management, and team building
4. Getting started: improvement opportunities, creating a sense of urgency, and building a guiding coalition

# Where did we leave off?



# Learning objectives

1. Create a shared understanding of your opportunity for improvement related to patient access
2. Develop a problem statement based on your shared understanding
3. Start to build a project charter
4. Introduce the concepts of team building
5. Discuss how your opportunity for improvement serves your clinic's vision

# Opportunity for Improvement and Creating a Problem Statement (QI)

# Creating a shared understanding of the opportunity for improvement

## 1 Getting started

Identify improvement opportunity;  
create problem statement

5W2H	
5W	<b>What</b> is the problem? <ul style="list-style-type: none"><li>• Keep it simple and brief</li></ul>
	<b>Why</b> is it a problem?
	<b>Where</b> do we encounter the problem?
	<b>Who</b> is impacted?
	<b>When</b> did we first encounter the problem?
2H	<b>How</b> did we know there was a problem?
	<b>How</b> often do we encounter the problem?



# Creating a shared understanding of the opportunity for improvement: an example

## 5W2H Template – An example

### What is the problem?

The problem is that the coffee at work tastes bad; it tastes like burnt rubber!

### Why is it a problem?

This is a problem because a large number of our employees drink coffee first thing in the morning to get their day started. Over time, the taste of the coffee has gone down and is now awful, resulting in a number of employees choosing to either skip their morning coffee or buying overpriced coffee at Starbucks! As a result, a number of employees appear to be more easily agitated and fatigued, leading to a larger number of incidents and mistakes being made at work. This not only negatively affects our employees, but also our patients, as they are accustomed to friendly and efficient staff. Now patients are potentially dealing with grumpy and irritated staff, waiting longer to be seen, etc.; all of which lead to a negative patient experience. Together, this creates an increased workload for all staff, including managers, as more time and effort is needed to correct errors and address patient complaints.

### Where do we encounter the problem?

We encounter the problem at our clinic coffee area when the first pot of coffee is brewed, usually around 8:00am.

### Who is impacted?

Most of our staff is affected, as many of our employees use their morning coffee to get their day started and boost their energy levels. Patients are also affected by this problem, as employees are not performing to their normal standards, leaving patients to deal with grumpy staff, waiting longer, etc. Managers are also spending more time and effort trying to correct trivial mistakes and poor attitudes among staff.

### When did we first encounter the problem?

We first encountered this problem about 3 months ago. That was when a number of us started to notice the taste was off.

### How did we know there was a problem?

The primary indicator was the number of complaints being heard around the clinic in regards to the taste of the coffee in the coffee room. Other symptoms of this problem include unhappy, disgruntled, and tired workers. Furthermore, we started receiving complaints from patients that staff were coming off as grumpy and/or rude. Multiple patients have also reported being unhappy with how long they had to wait to see their provider.

### How often do we encounter the problem?

We encounter this problem at least once a day.

## Exercise 4 (QI)



# Creating a problem statement: an example



Objective of this exercise is be able to identify a properly written problem statement.



Review the completed 5W2H tool for the example of “the coffee at work tastes bad” and vote on which problem statement is the best.



Submit answers using the Zoom poll function.



Discuss the strengths and weaknesses of the problem statements.

# Creating a problem statement: an example

**#1**

The taste of the coffee at work has progressively gotten worse, leading to growing number of agitated and tired employees. This has resulted in an increased number of complaints, indicating a negative patient experience, and an increase in time spent by managers on correcting errors and addressing complaints.

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**#2**

People at work are feeling tired and agitated because they aren't drinking the coffee at work. Some employees have resorted to buying coffee on the way to work, while others have given it up completely. As a result, managers have noticed an increase in errors being made throughout the workday.

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**#3**

The number of complaints made by patients has been increasing steadily since the coffee at work started to taste bad. Employees are lacking energy and committing more errors throughout the day. Managers are having to spend more time dealing with errors committed by staff and are unable to complete their daily tasks.

## Exercise 5 (QI)

# Creating a shared understanding of the opportunity for improvement: the real deal



Objective of the exercise is to create a shared understanding of an opportunity for improvement related to patient access.



As a team, work to complete the 5W2H tool for your opportunity for improvement.

- May need to complete as homework if not completed in-session



Responses will be recorded in the 5W2H Template by the course facilitator.

## Exercise 6 (QI)

# Creating a problem statement: the real deal



Objective of this exercise is to create a problem statement using your completed 5W2H tool.



Now that you have a shared understanding of the opportunity for improvement, use your completed 5W2H tool to craft a problem statement.

- May need to complete as homework if not completed in-session



Record your problem statement in your project charter.



# Project Charter



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# Project charter

Project Charter Template	
Project title	
Team members	
Name	Position
Problem statement (What is wrong/not working?)	
Aim statement (What is the team trying to accomplish?)	
Measures: Outcome (Answers the "so what?" question)	
Process (Is the team doing the right things to get there?)	
Balance (Are the changes the team is making to one part of the system causing problems elsewhere?)	

Project charter cont.			
Root cause (What root cause(s) will the team focus on?)			
Change ideas (What can we do that may lead to an improvement?)			
Communication plan (How will you inform others about the plan(s) for change?)			
What is the message?	How will the message be communicated?	Who should receive this message?	Person responsible

# Homework 1 (QI)

# Project charter



Objective of this homework is to become familiar with creating and using a project charter.



Begin entering information from previous exercises and homework into your project charter.



Enter previously collected information into the Project Charter Template provided by the course facilitator.

# Team Building (TmB)

# What is the role of team building?

- Elevates communication and coordination among staff
- Identifies the strengths and weaknesses of both the team and its members
- Builds trust amongst team members



# AIM's team building roadmap

1. Evaluate existing resources (part of the exercise today)
2. Decide as a team
3. Engagement
4. Team Mapping
5. Remove obstacles
6. Create a test team
7. Build on the change
8. Share lessons learned



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## Exercise 7 (TmB)



# Identifying resources



Objective of this homework is to become familiar with the resources required to engage in quality improvement efforts.

As a group, create a list outlining what you currently have access to that will facilitate your improvement efforts.



Could be related to:

- Personnel
- Funding
- Equipment/supplies, etc.



Record responses in the Resources Template by the course facilitator.

# Aligning opportunity for improvement with vision (CM)

# A vision can lead to a change in the status quo



## Exercise 8 (CM)

# Alignment of improvement opportunity with vision



Objective of this exercise is to work as a team to explore how your improvement opportunity feeds into your vision.

## Ask yourself:



- What is important to:
  - You as an individual (personal and professional)
  - Your team
  - Your patients



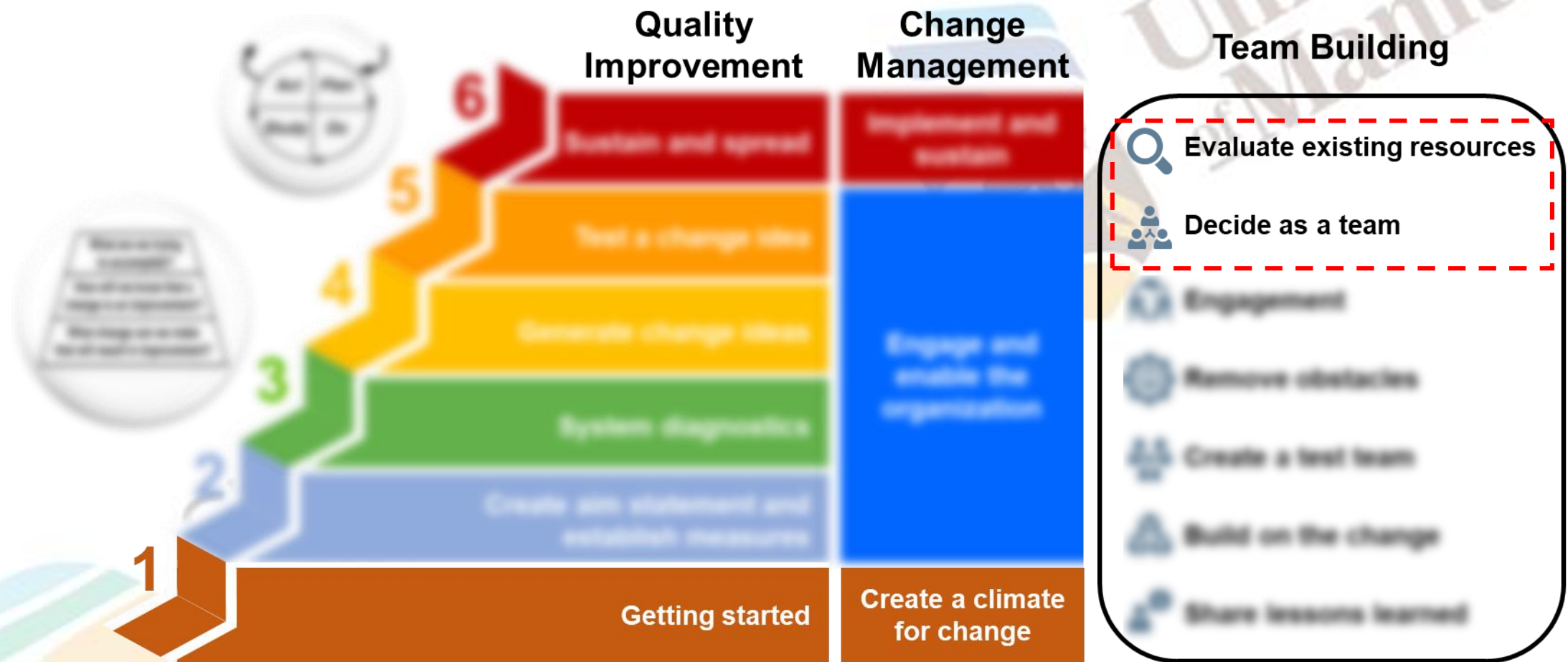
Your responses will be recorded by the facilitator.

# How did we address the three pillars?

1. **Change Management:** Discussed how opportunity for improvement serves your vision
2. **Quality Improvement:** Learned how to create a shared understanding of the opportunity for improvement using the 5W2H tool and how to write a problem statement; introduction to the project charter
3. **Team Building:** Introduced concepts of team building; evaluated existing resources; exercises and homework activities all involve team-based decisions



# How did we address the three pillars?





# Action items for the next two weeks

- Complete the 5W2H template, if not finished in-session
- Create a problem statement for your opportunity for improvement, if not finished in-session
- Begin filling out your project charter



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# Next steps

- Preparing a SMART aim statement
- Developing communication and engagement strategies
- Introduction to measurement



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