

# Workshop 7 (AIM 107)



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# Recap from Workshop 6

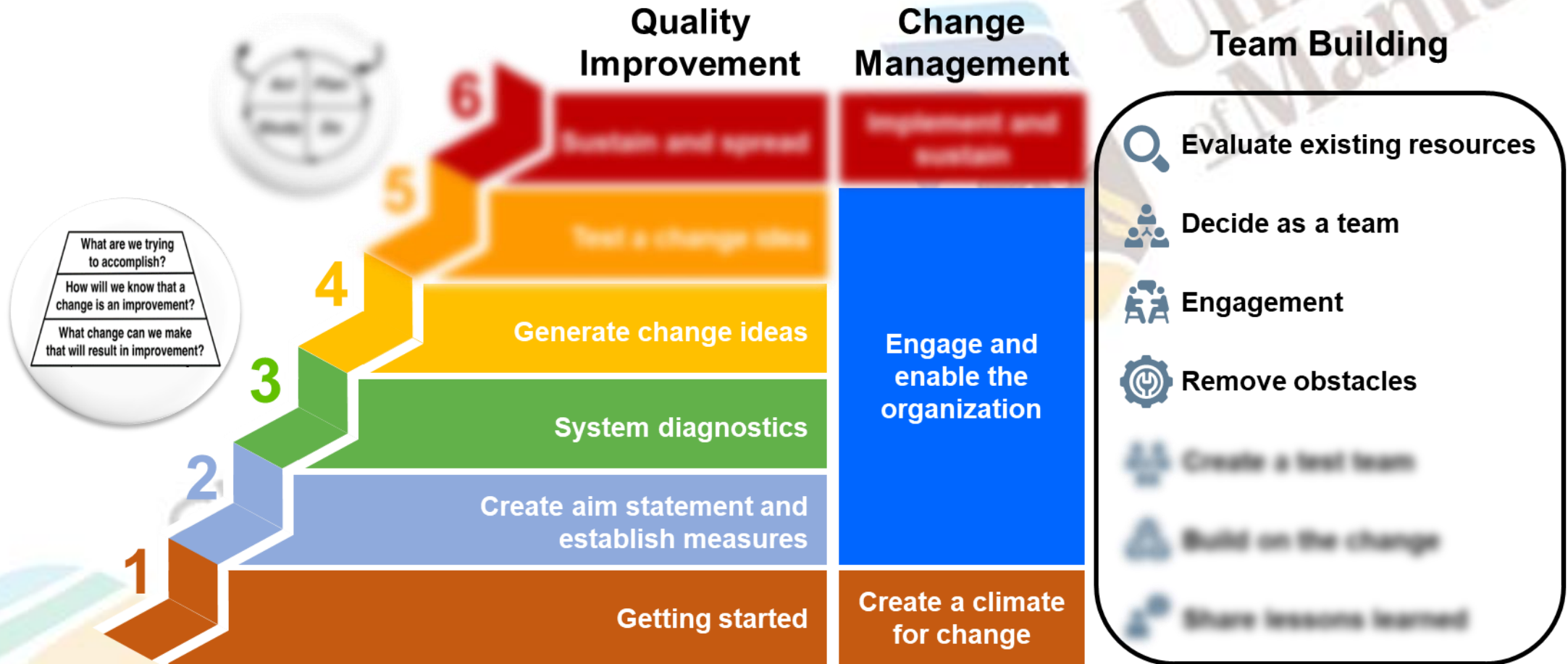
1. Decide as a team on which root cause to tackle
2. Generate change ideas related to a root cause



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# Where did we leave off?



# Learning objectives

1. Prioritize change idea for the root cause(s)
2. Define the Plan, Do, Study, Act (PDSA) cycle
  - Execute the first step of the PDSA cycle
3. Identify the importance of generating short-term wins

## Exercise 21 (QI)

# Prioritizing change ideas: the real deal



Objective of this exercise is for the group to choose a change idea to focus on for your quality improvement project related to patient access.



Review the updated list of change ideas for the root cause chosen in workshop 6.



Discuss as a group and determine which change idea is priority #1.

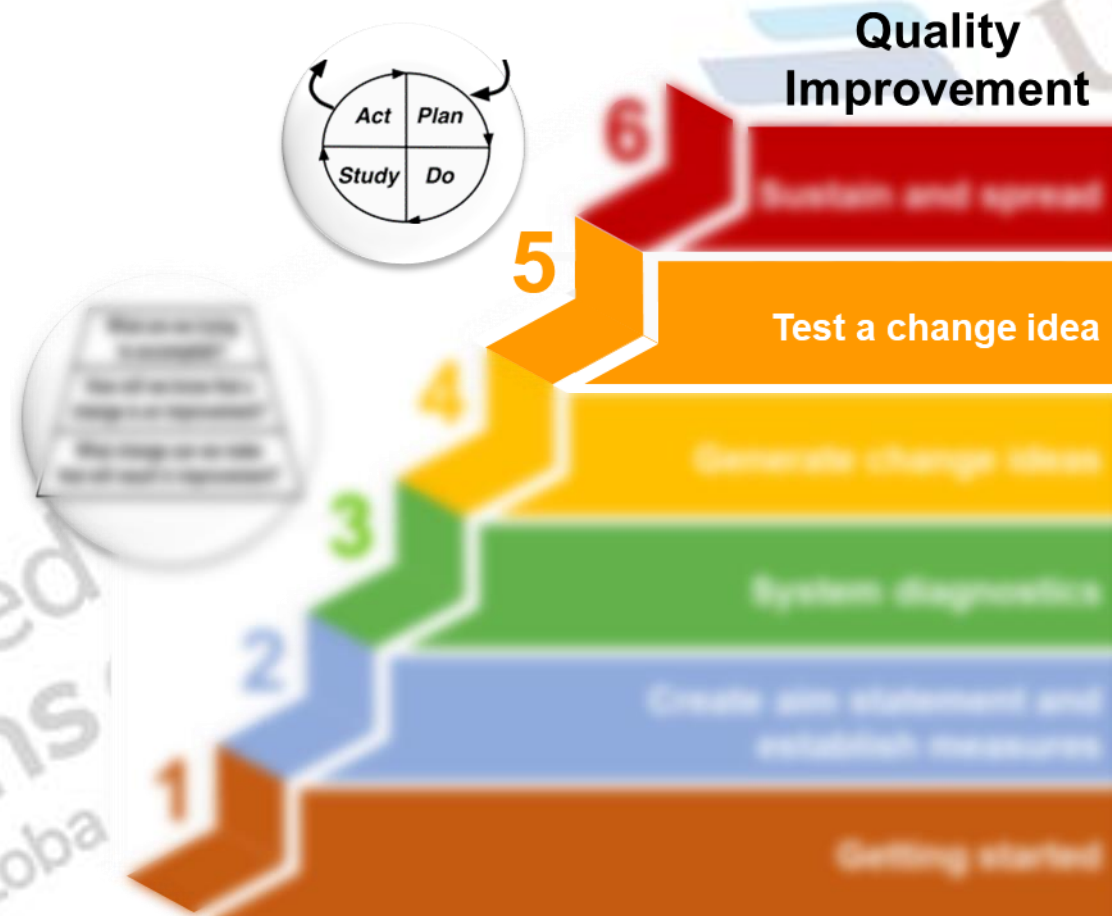


Note the change idea selected in the project charter.

# PDSA Cycle (QI)



# Plan, Do, Study, Act (PDSA) cycle





# Plan

- Define the purpose of your PDSA cycle
- Ask the question(s) you want your PDSA cycle to answer
- Identify who/what/when/where for the cycle
- Identify who/what/when/where for data collection
- Two important steps in the planning phase include:
  1. Making predictions related to the question(s) being asked
  2. Determining the scale of the PDSA cycle



# 1. Prediction

- Predicts the answer to the question(s) you will ask
  - Further develops your idea
- Forces you to think through the why of our change idea
  - Goes back to the aim statement
- Identifies differences (of opinion) among the team
  - Not all need to agree
- Helps identify the scale of the PDSA cycle



## 2. Scale

- There is a correlation between the degree of belief and the consequences of failure
- Starting with small-scale cycles can:
  - Mitigate effect(s) due to differences in the level of commitment and/or degree of belief
  - Help minimize risks
  - Reduce impact on balance measure
- Rule of 1s
  - Start small



# Do

- Carry out the plan on a small scale
- Collect data from the cycle
- Document problems from the cycle



# Data

- Two types of data collected during PDSA cycles
  1. Data that answers the question(s) in the plan (compared to predictions)
  2. Narrative/qualitative data of issues and/or problems throughout the cycle



**Data needs to fit your purpose and address what you are trying to answer!**



# Study

- Analyze data
- Bring together results from the “Do” phase with predictions from the “Plan” phase
- Results do not have to support the prediction
  - A correct prediction can impact confidence in change
  - Incorrect prediction can be recognized as another opportunity for improvement
- A chance to review documented problems





# Act

- Decide if the change idea will be:
  - Dropped
  - Modified
  - Further tested
  - Implemented
- Critical principles
  - Test on a small scale
  - Wide range of conditions





# Multiple PDSA cycles

1. Test on a small scale
2. Test a wider group
3. Test new conditions
4. Implement
5. Spread



# Documenting PDSA

- Important to document cycles
  - Separate from the project charter

## PDSA Template

Cycle #:

Date:

Plan

Root cause:

Change idea:

Purpose of this cycle is to:

☐ Develop

☐ Test

☐ Implement

Objective of this cycle is to:

Questions for the cycle to answer about the change idea:

Prediction:

Task(s) required

What? (specific task)	Who?	When?	Where?

Data collection

What data will be collected?	How? (Chart audit, checklist, etc)	Who?	When?	Where?

Data collected (Summarize the data collected)

Study

What was learned?	Were there any barriers?

Act – What comes next?

Next step(s)	Drop/Modify/Test/Other

# Examples of PDSAs

- Informal/real-life



# PDSA Template: an example

**PDSA Template**

Cycle #: 1 Date: November 30, 2022

**Plan**

**Root cause:**  
The coffee machine is always dirty.

**Change idea:**  
Ensure coffee machine is cleaned every Monday and Tuesday

**Purpose of this cycle is to:**  
☒ Develop
 ☐ Test
 ☐ Implement

**Objective of this cycle is to:**  
Determine the proper way to clean the coffee machine.

**Questions for the cycle to answer about the change idea:**  
Is there a correct way to clean the coffee machine?

**Prediction:**  
We believe we can find the manufacturer's guide for cleaning the machine.

**Task(s) required**

What? (specific task)	Who?	When?	Where?
Search for manufacturer's cleaning instructions.	Frank	Week of Dec. 5 <sup>th</sup>	Office computer

**Data collection**

What data will be collected?	How? (Chart audit, checklist, etc)	Who?	When?	Where?
If manufacturer's cleaning instructions are found.	N/A	Frank	Week of Dec. 5 <sup>th</sup>	Office computer

**Data collected** (Summarize the data collected)  
Manufacturer's instructions were found.

**Study**

What was learned?	Were there any barriers?
Specific cleaning instructions exist for the office coffee machine.	N/A

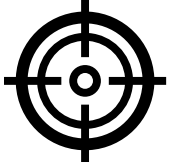
Project charter cont.

**Act – What comes next?**

Next step(s)	Drop/Modify/Test/Other
Review instructions and draft a cleaning protocol.	Develop

## Exercise 22 (QI)

# PDSA example



Objective of this exercise is for each group member to practice the steps of a PDSA cycle through an interactive game.



Listen to the rules given by the facilitator.

Participate!

Have fun!



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# New Technology PDSA

- A new technology has been developed to help with efficiency in your practice. The technology is represented by a sequence of numbers. We want to discover the rule (or theory) that generates the sequence or technology.
- You will run a series of tests to determine the rule. When you are sure that you know the rule (based on enough cycles), you will be ready to implement (the winner of the game identifies the rule).



# Instructions

- Facilitator will show a number
- You will write down your theory and predict what the next number will be
- You will identify the rule
- You have 3 choices:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (identify the next number); or
  3. Implement the change (state the sequence rule)

# Results

Cycle	Theory	Sequence	Correct/Incorrect	Bank (Start with \$30,000)
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

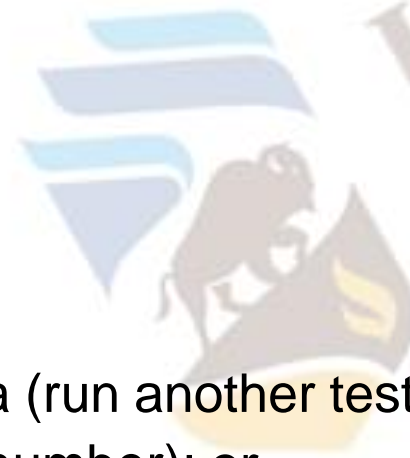
# Jumping to implementation

- Everyone will start with \$30,000
- Cost of doing business:
  - If you decide to develop your change idea (ask for another number), the cost is \$3000
  - If you decide to test your change idea (“guess” your number) and you are correct, add \$4000, BUT if you are incorrect, you lose \$8000
  - If you think you are ready to implement, you can state the sequence rule. If you are right, you add \$20,000; if you are incorrect, you lose \$30,000.

# Here we go...

1, 2

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



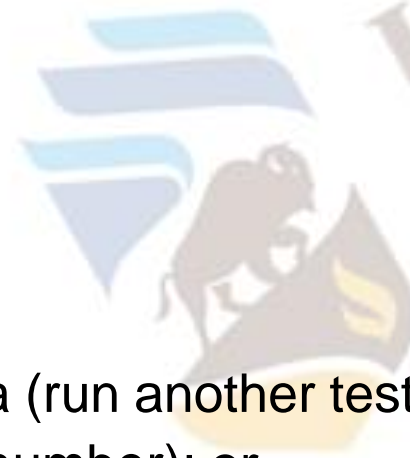
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# Here we go...

1, 2, 3

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



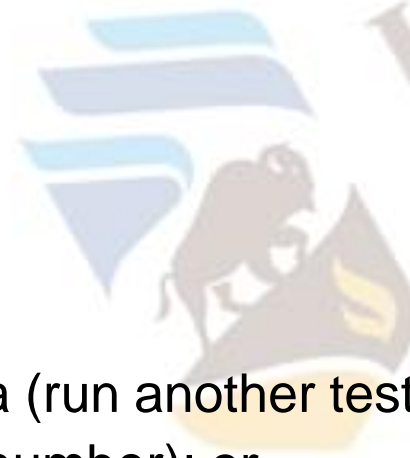
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# Here we go...

1, 2, 3, 6

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



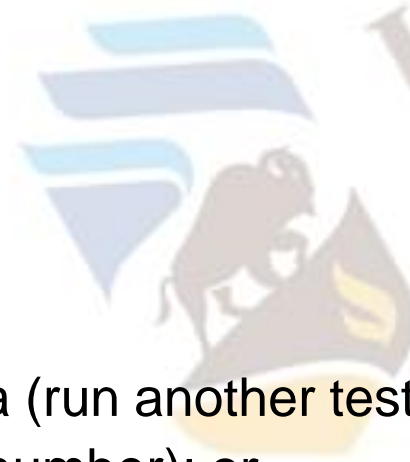
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# Here we go...

1, 2, 3, 6, 7

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



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# Here we go...

1, 2, 3, 6, 7, 8

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



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# Here we go...

1, 2, 3, 6, 7, 8, 21

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



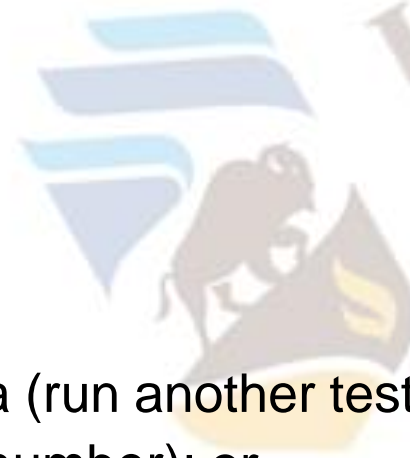
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# Here we go...

1, 2, 3, 6, 7, 8, 21, 22

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



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# Here we go...

1, 2, 3, 6, 7, 8, 21, 22, 23

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



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# Here we go...

1, 2, 3, 6, 7, 8, 21, 22, 23, 66

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



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# Here we go...

1, 2, 3, 6, 7, 8, 21, 22, 23, 66, 67

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



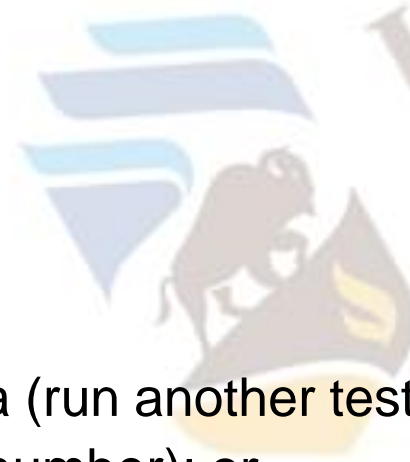
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# Here we go...

1, 2, 3, 6, 7, 8, 21, 22, 23, 66, 67, 68

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)



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# Here we go...

1, 2, 3, 6, 7, 8, 21, 22, 23, 66, 67, 68, 201

- Choices are:
  1. Continue to develop your change idea (run another test); or
  2. Test your change idea (give the next number); or
  3. Implement the change (state the sequence rule)

# Take-home messages

- Change ideas into action
- Not “one and done”
- Prediction is important
- Get started (DO)!



## Exercise 23 (QI)

# Start “Plan” phase: the real deal



Objective of this exercise is for the team to start creating a plan for the first PDSA cycle related to the change idea.

Think about your change idea and identify:



- Purpose of cycle
- What question do you want to ask?
- What do you predict will happen?
- Identify who/what/when/where for cycle and data collection



Facilitator to record responses in PDSA template.

# Homework 5 (QI)

# Continuation of “Plan” phase: the real deal



Objective of this homework is for the team to complete and communicate the “Plan” phase for the first PDSA cycle.

Once the plan is completed:



- Review with the facilitator
- Make adjustments, as necessary
- Communicate the plan with stakeholders and solicit feedback
- Re-connect with the facilitator to review any further changes following feedback



Complete the “Plan” section of the PDSA template.

# Communication breakdown

**Communication Plan Guide**

What modes of communication are available to the clinic?

<input type="checkbox"/> Email	<input type="checkbox"/> Clinic-wide meeting
<input type="checkbox"/> Phone	<input type="checkbox"/> Stand-up meeting
<input type="checkbox"/> Poster	<input type="checkbox"/> Other

*If other, please list:*

Who will be in charge of the communication plan? (Crafting, distributing, organizing meetings, etc.)

How frequently will messages be sent/updated?

<input type="checkbox"/> Daily	<input type="checkbox"/> Monthly
<input type="checkbox"/> Weekly	<input type="checkbox"/> Whenever new information is available

What is the key message? *NB. Message should be transparent, simple, and relevant to stakeholders.*

Who needs to receive this message?

How will feedback be collected and who will be responsible for feedback collection?



# Homework 6 (QI)

# Complete “Do” phase: the real deal



Objective of this homework is for the team to execute the “Do” phase of the first PDSA cycle related to the change idea.



**Once a course facilitator has reviewed and approved your plan, carry out the “Do” phase of the first PDSA cycle.**

**Use the completed “Plan” section of your PDSA template to help guide this phase.**

**Continue data collection.**



Record results in the “Do” section of the PDSA template.

# Generating Short-term Wins (CM/QI/TmB)

# Short-term wins

- Reminding team of incremental progress and celebrating wins can maintain momentum
- Wins should be meaningful
  - Can be tied to PDSA cycles and the positive outcomes
- Communication is important
- What are you proud of thus far?



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## Exercise 24 (CM/QI/TmB)

# A moment of gratitude



Objective of this exercise is for each participant to identify one thing they are proud of having accomplished thus far.



Reflect on your efforts:

- As an individual
- As a team



To submit answers, visit [www.menti.com](https://www.menti.com) and enter the code provided by the course facilitator.



Discuss items as a group.

# How did we address the three pillars?

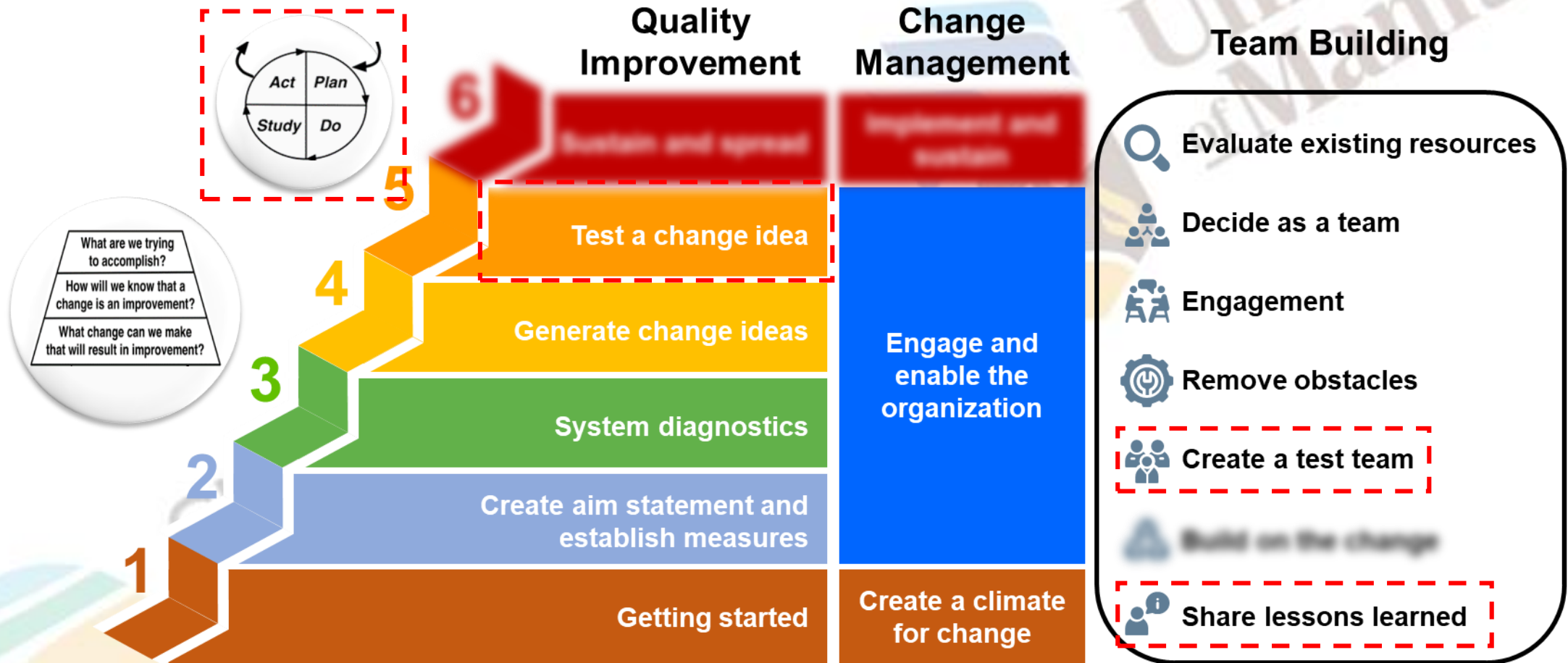
1. **Change Management:** Discussed the importance of quick wins to maintain momentum; communicated “Plan” phase of first PDSA cycle to bigger team
2. **Quality Improvement:** Introduced concept of the PDSA cycle; the team started the “Plan” phase of their first PDSA cycle
3. **Team Building:** By identifying the who/what/when/where for the PDSA cycle and data collection, a test team has been established



# How did we address the three pillars?



# How did we address the three pillars?



# Action Items for the next two weeks

- Complete the “Plan” phase and communicate to stakeholders
  - Collect feedback
  - Review the plan with the facilitator
- Execute the “Do” phase in consultation with the facilitator
- Continue data collection
- Update project charter

PDSA Template				
Cycle #:		Date:		
Plan				
Root cause:				
Change idea:				
Purpose of this cycle is to:				
<input type="checkbox"/> Develop		<input type="checkbox"/> Test		<input type="checkbox"/> Implement
Objective of this cycle is to:				
Questions for the cycle to answer about the change idea:				
Prediction:				
Task(s) required				
What? (specific task)	Who?	When?	Where?	
Data collection				
What data will be collected?	How? (Chart audit, checklist, etc)	Who?	When?	Where?
Data collected (Summarize the data collected)				
Study				
What was learned?		Were there any barriers?		
Act – What comes next?				
Next step(s)			Drop/Modify/Test/Other	

# Next steps

- Reviewing/completing the first PDSA cycle
- Discussing key steps in sustaining change
- Understanding how to maintain momentum, institute change, and spread change throughout your practice



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