

Workshop 7 (AIM 107)




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?



What are we trying to improve?
How do we know that a change is required?
What change are we making and what will result in improvement?

Quality Improvement: Sustain and spread, Test a change idea, Generate change ideas, System diagnostics, Create aim statement and establish measures, Getting started

Change Management: Implement and sustain, Engage and enable the organization, Create a climate for change

Team Building: Evaluate existing resources, Decide as a team, Engagement, Remove obstacles, Create a test team, Build on the change, Share lessons learned

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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

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Exercise 21 (QI)

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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.

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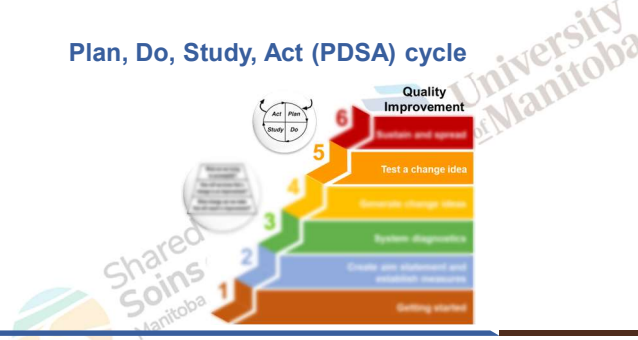
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The diagram shows the PDSA Cycle (QI) with a circular arrow indicating a continuous process. The text "PDSA Cycle (QI)" is prominently displayed in green. Logos for "Shared Health Soins communautaires Manitoba" and "University of Manitoba" are visible in the background.

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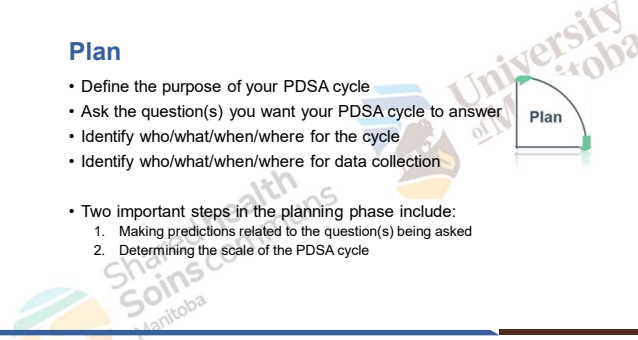
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The diagram illustrates the Plan, Do, Study, Act (PDSA) cycle as a staircase with six steps, numbered 1 to 6. The steps are: 1. Getting started, 2. Create an statement and establish measures, 3. System diagnosis, 4. Develop change idea, 5. Test a change idea, and 6. Sustain and spread. A circular arrow at the top indicates the cycle repeats. The text "Plan, Do, Study, Act (PDSA) cycle" is at the top. Logos for "Shared Health Soins communautaires Manitoba" and "University of Manitoba" are visible in the background.

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The diagram shows the "Plan" phase of the PDSA cycle, with a circular arrow indicating a continuous process. The text "Plan" is prominently displayed in green. Logos for "Shared Health Soins communautaires Manitoba" and "University of Manitoba" are visible in the background.

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

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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



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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



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Do

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




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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

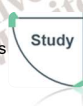
Data needs to fit your purpose and address what you are trying to answer!



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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



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Act

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



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Multiple PDSA cycles

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

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Documenting PDSA

- Important to document cycles
 - Separate from the project charter

PDSA Template

Cycle # _____ Date _____

Start date _____ End _____

Change idea _____

Purpose of this cycle is to _____

Objective of this cycle is to _____

Questions for the cycle to answer about the change idea _____

Prediction _____

Tools required _____

What specific data _____ Who? _____ When? _____ Where? _____

Data collection

What data will be collected? _____ How? _____ Who? _____ When? _____ Where? _____

Data collected (Summarize the data collection) _____

Study

What was learned? _____ Were there any barriers? _____

Act - What action next? _____ Next steps _____ Stop/Restart/Next Cycle _____

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Examples of PDSAs

- Informal/real-life

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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.

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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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Workshop 7

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)

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Take-home messages

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



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Exercise 23 (QI)

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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.

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Homework 5 (QI)

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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.

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Communication breakdown

Communication Plan Guide

What modes of communication are available to the plan?

- ☐ Email
- ☐ Poster
- ☐ One-on-one meeting
- ☐ Group meeting
- ☐ Other
- ☐ Other (please list)

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

How frequently will messages be sent/updated?

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Whenever new information is available

What is the key message? (All Messages 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?

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Homework 6 (QI)





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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.

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

Shared health
Soins communs
Manitoba

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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?

Shared health
Soins communs
Manitoba

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Exercise 24 (CM/QI/TmB)

Shared health
Soins communs
Manitoba

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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 and enter the code provided by the course facilitator.



Discuss items as a group.

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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

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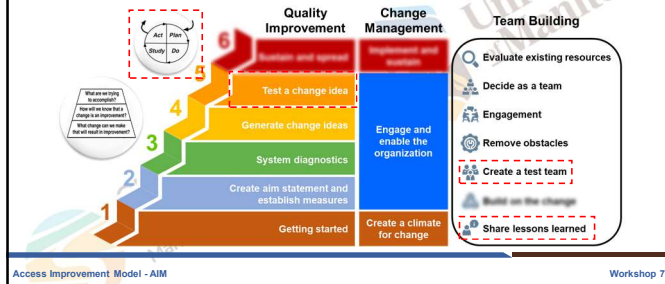
How did we address the three pillars?



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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

The PDSA Template form includes sections for:

- Plan:** Change aim, Current state, Future state, Questions for the cycle to answer about the change idea, Problems.
- Do:** Data collected, Summary of data collected, Data collection, What was learned, Next steps, Done/Not Done/Not Started.
- Check:** What was learned, Next steps, Done/Not Done/Not Started.
- Act:** What was learned, Next steps, Done/Not Done/Not Started.

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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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