HRET HIIN Virtual Event
Foundations for Change Fellowship

Wednesday, February 14 Call #3
11:00- 12:00 p.m. CT
Welcome and Introductions

Mallory Bender, Program Manager, HRET
AHA/HRET Hospital Improvement Innovation Network (HIIN)
QI Fellowship Foundations for Change Session #3
Online Live Webinar
February 14, 2018

The planners and faculty of the HRET HIIN “QI Fellowship Accelerating Improvement Session #1” webinar have indicated no relevant financial relationships to disclose in regard to the content of this presentation.

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ABQAURP is an approved to provide continuing education for nurses. This activity is designated for 1.0 Nursing Contact Hours through the Florida Board of Nursing, Provider # 50-94.
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<td>11:00-11:05</td>
<td>Welcome and Introduction</td>
<td>Mallory Bender, HRET</td>
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<tr>
<td>11:05-11:15</td>
<td>Action Period Discussion</td>
<td>Kathy Duncan, IHI</td>
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<td>• Assignment for Call #3: QI 102 Lesson 5 Testing Changes</td>
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<td>• Suggested Tasks:</td>
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<td>• Develop an aim statement</td>
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<td>• Start a Driver Diagram</td>
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<td>• Office hour Follow-up</td>
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<td>11:15-11:45</td>
<td>What changes can we make that will result in improvement?</td>
<td>Kathy Duncan, IHI</td>
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<td>• Test changes on a small scale using the Plan do study Act cycle.</td>
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<td>• Identify the processes that make up the PDSA cycle.</td>
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<td>• Understanding the value of each step within the cycle for improving results</td>
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<td>11:45-11:55</td>
<td>Next Steps</td>
<td>Kathy Duncan, IHI</td>
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<td>• Suggested Tasks</td>
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<td>• Plan and conduct a small test of change</td>
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<td>• Additional Resources:</td>
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<td>• PDSA worksheet</td>
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<td>• Video: Driver Diagrams</td>
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<td>• Video: Why should you start testing changes ASAP?</td>
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<td>• QI -102 Lesson 4 Developing Changes</td>
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<td>• Assignment for call #4:</td>
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<td>• QI 102 Lesson 3 Choosing Measures</td>
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<td>11:55-12:00</td>
<td>Bring It Home</td>
<td>Mallory Bender, HRET</td>
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### 342 People in the Fellowship!

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<thead>
<tr>
<th>State</th>
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<td>Alabama</td>
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<td>Florida</td>
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<td>Massachusetts</td>
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<td>Maryland</td>
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<td>Virginia</td>
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<td>Wyoming</td>
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<td>West Virginia</td>
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<td>Saipan</td>
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Introductions

Kathy D. Duncan, RN, is a Director for the Institute for Healthcare Improvement (IHI) where she oversees the development and execution of multiple areas of safety and quality improvement related content.

Lauren H. Macy is an Improvement Advisor for the Institute for Healthcare Improvement (IHI) supporting Collaboratives aiming to reduce parental stress in NYC (Early Years Collaborative) and improving end of life conversations across 20 health care organizations in Massachusetts. Additionally, she is director for IHI’s Improvement Coach Professional Development Program—teaching both the science of improvement methodology and coaching techniques.
# Foundations for Change Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
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<tbody>
<tr>
<td>January 17</td>
<td>Set Up for Success</td>
</tr>
<tr>
<td>January 31</td>
<td>What are you trying to accomplish?</td>
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<tr>
<td>February 14</td>
<td>What changes can we make that will result in improvement?</td>
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<td>February 28</td>
<td>How will we know that a change is an improvement?</td>
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<td>March 14</td>
<td>Testing Vs. Implementation</td>
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<td>March 28</td>
<td>Practical Strategies</td>
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<td>April 11</td>
<td>Implementation</td>
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<td>May 9</td>
<td>Transitioning to Adoption</td>
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<td>June 6</td>
<td>Essential Tool Kit</td>
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<tr>
<td>July 11</td>
<td>Celebration and Wrap up</td>
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Wednesdays 11:00-12:00 PM CT
Action Items for Action Period
Essential Components of an Aim Statement

**What?** State the focus of your improvement effort (make sure it relates to the fundamental customer need)

**How good?** Declare a Numerical Goal for outcomes
Ambitious but achievable.

**By when?** Specify the timeframe.

**For whom?** Name the customers or population of focus.
Primary persons to receive benefit?

**Where?** Define the process or system you want to improve
What is the scope? Boundaries? Starts/ Stops?
Essential Components of an Aim Statement

- **What?** State the focus of your improvement effort (make sure it relates to the fundamental customer need)

- **How good?** Declare a Numerical Goal for outcomes Ambitious but achievable.

- **By when?** Specify the timeframe.

- **For whom?** Name the customers or population of focus. Primary persons to receive benefit?

- **Where?** Define the process or system you want to improve. What is the scope? Boundaries? Starts/ Stops?
Observations
(From the discussion group and office hour call)

• Occasionally the system scope was left out. Easy to do, but it is powerful to describe the exact scope. Name it. It is powerful for the team.
  • 4 south, Med surg, Outpatient Depart., etc.

• Often the aim was around tasks to be completed (compliance, education of, etc.) instead of the actual improvement addressed. Consider: What do you want to happen? What is the main goal?
  • Decrease readmissions, Decrease sepsis mortal

• Most had very ambitious numbers! Percentages, real world numbers
  • Reduce by 50%, 90%

• Be careful with rates – Staff connect with numbers, not rates (it is okay to have an aim for senior leadership – a rate and one for staff a number of events)
  • “a CAUTI rate of 0.1223 vs. we only had 2 CAUTIs”

• Most all had a timeframe! Some ambitious, some not so much.
• Tip: Great to specify a date vs. ‘end of the year’
  • December 31, 2017, April 30, 2017, July 1, 2017
Did you “put your aim to work”?

(Are you using the aim, in meetings, in documents, in reports, etc.,)

How?
Complete the application by 2/16
Complete the self assessment by 2/28
Find/Join a team
Develop an Aim
Start a driver diagram
Complete IHI Open School assignments
Fellowship Checklist to Date

• Check all that apply:
  ✓ Complete the application by 2/16
  ✓ Complete the self assessment by 2/28
  ✓ Find/Join a team
  ✓ Develop an Aim
  ✓ Start a driver diagram
  ✓ Complete first two IHI Open School assignments
    – QI 102 lesson 2 Setting an aim
    – QI 102 Lesson 5 Testing Changes
Objectives for Today

• Test changes on a small scale using the Plan Do Study Act cycle.
• Identify the processes that make up the PDSA cycle.
• Understanding the value of each step within the cycle for improving results
“All improvement will require change, but not all change will result in improvement!”

What change can we make that will result in improvement?

“It is not necessary to change. Survival is not mandatory.”

W. E. Deming,
Developing Ideas for Change

- Change Concept
- Specific Ideas
- Theories and Predictions
Developing Ideas for Change

Change Concept

A general notion or approach that has been found to be useful in developing specific ideas for changes that lead to improvement.

- Improve ICU patients experience
- “I feel the staff doesn’t know me”
- “I feel like you treat my dad as a room number, not a retired Circuit court Judge and grandpa”
Developing Ideas for Change

Taking a concept and getting specific

Change Concept

• “staff doesn’t know me”
• “not a room number, a retired Judge and grandpa”
• We want to know patients, call them by preferred name, connect with their lives.

Specific Ideas

• Change ideas:
  • Update EMR
  • Ask questions on admissions
  • Talk to family
  • Open visiting hours
  • Add “get to know me poster”
Developing Ideas for Change

Why do you think this idea will result in improvement?

• Engaging patient and family on admission with specific personal questions/poster will encourage a sense of caring.

• Posting a completed “Get to know me” poster in each room will assist staff in calling patients each by their preferred name and connecting with matters important to the patient and family.
Developing Ideas for Change

Your Thoughts?
Is this new for you?

Change Concept
Specific Ideas
Theories and Predictions

Is this new for you?
The Model for Improvement provides an approach to help increase the odds that the changes we make will result in lasting improvement.

Let’s review the PDSA part of the model for improvement and tests of change
Plan, Do, Study, Act Cycle

Plan
Objective
Questions and predictions (why)
Plan to carry out the cycle (who, what, where, when)

Do

What is the plan?

What will happen if we try something different?
Plan, **Do**, Study, Act Cycle

- **Plan**
  - Carry out the plan
  - Document problems and unexpected observations
  - Begin analysis of the data

- **Do**
  - What should we do?
  - Let's try it!
Plan, Do, Study, Act Cycle

**Act**
- Complete the analysis of the data
- Compare data to predictions
- Summarize what was learned

**Study**
- What did we learn?
- Did it work?
Plan, Do, Study, **Act** Cycle

**Act**

What changes are to be made?
Next cycle?

**Study**

**Do**

Now what do we do?
Principles for Testing

• A test of change should answer a specific question
• A test of change requires a theory and prediction
Why Test?
Why Test? Why Not Just Implement?

- Increase degree of belief
- Document expectations
- Build a common understanding
- Evaluate theories and predictions
- Test ideas under different conditions
- Learn and adapt
Principles for Testing a Change

1. Test on a small scale
2. Collect data over time
3. Build knowledge sequentially with multiple PDSA cycles for each change idea
4. Include a wide range of conditions in the sequence of tests
Test on a Small Scale

• Conduct the test over a short period of time
• Conduct the test with one member of your team or with one patient
• Test the change on a small group of volunteers
• Develop a plan to simulate the change in some way
• Incorporate redundancy in the test by making the change side-by-side with the existing system
Principles for Testing a Change

1. Test on a small scale
2. Collect data over time
3. Build knowledge sequentially with multiple PDSA cycles for each change idea
4. Include a wide range of conditions in the sequence of tests
Principles for Testing a Change

1. Test on a small scale
2. Collect data over time
3. Build knowledge sequentially with multiple PDSA cycles for each change idea
4. Include a wide range of conditions in the sequence of tests
Repeated Use of the PDSA Cycle

Changes That Result in Improvement

Why Do Multiple Cycles?

- Increase degree of belief
- Determine which of several proposed changes lead to improvement
- Decide how to adapt change to the environment
- Evaluate cost implications and possible side effects of change
- Give people chance to experience the change prior to implementation
Tips for Developing a Good Test

• A test of change should answer a specific question
• A test of change requires a theory and a prediction
• Always think a couple of cycles ahead
• Scale down the size, and reduce the time required
• Do not try to get buy-in or consensus for the test – Instead, recruit volunteers
• Include a wide range of conditions in the sequence of tests
• Document your tests (PDSA form)
• Set aside time to analyze the data from test, study the results and use to guide the team’s actions.
• Use temporary supports to make change feasible for test
• Don’t confuse a TASK with a TEST
Example of a PDSA Form

### Aim:

every goal will require multiple smaller tests of change

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<tr>
<th>Describe your first (or next) test of change:</th>
<th>Person responsible</th>
<th>When to be done</th>
<th>Where to be done</th>
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### Plan

List the tasks that need to be set up to achieve your first test of change

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<tr>
<th>What questions will you ask</th>
<th>Person responsible</th>
<th>When to be done</th>
<th>Where to be done</th>
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### Do

Describe what actually happened when you ran the test

### Study

Describe the measured results and how they compared to your predictions

### Act

Describe what modifications to the plan will be made for the next cycle from what you learned

Institute for Healthcare Improvement
Test vs. Task

• Test: Must answer a question.

• Task: Something to do

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Test vs. Task

Educate 100% of staff on 4W regarding screening protocols by April 1, 2017
Test vs. Task

Develop and implement a protocol for sterilization of all surgical equipment.
Test vs. Task

Complete EKG in Triage on 3 pts on January 15 (Kathy)
Test vs. Task

Facilitate weekly meetings to discuss pressure ulcer processes.
Test vs. Task

Ask 2 patients or family members to complete the “all about me card”.

LiveChat
What are your ideas for a test?

I would love to hear about it. Please post to discussion group or send to kduncan@ihi.org
Action Items for Action Period

• Assignment for Call #4:
  – QI 102 Lesson 3 Choosing Measures

• Suggested Tasks
  – Plan and conduct a small test of change (post on the discussion group)
  – Utilize the PDSA Worksheet as a guide for your small test of change
  – QI 102 Lesson 5 Testing Changes
  – Self-Assessment submission (if not completed)
Action Items for Action Period

• Additional Resources:
  – PDSA worksheet
  – Video: Driver Diagrams
  – Video: Why should you start testing changes ASAP?
  – QI -102 Lesson 4 Developing Changes
  – QI -102 Lesson 5 Testing Changes
Discussion Group

Full URL:
Bring it Home

Mallory Bender, Program Manager, HRET
Join us for our next optional QI office hours!
February 21 from 11-12 CT
Continuing Education Credits

- Launch the evaluation link in the bottom left hand corner of your screen.
- If **viewing as a group**, each viewer will need to submit separately through the CE link.
THANK YOU!