

Where are we up to?

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After all, for most of us this is our first time doing formal improvement work

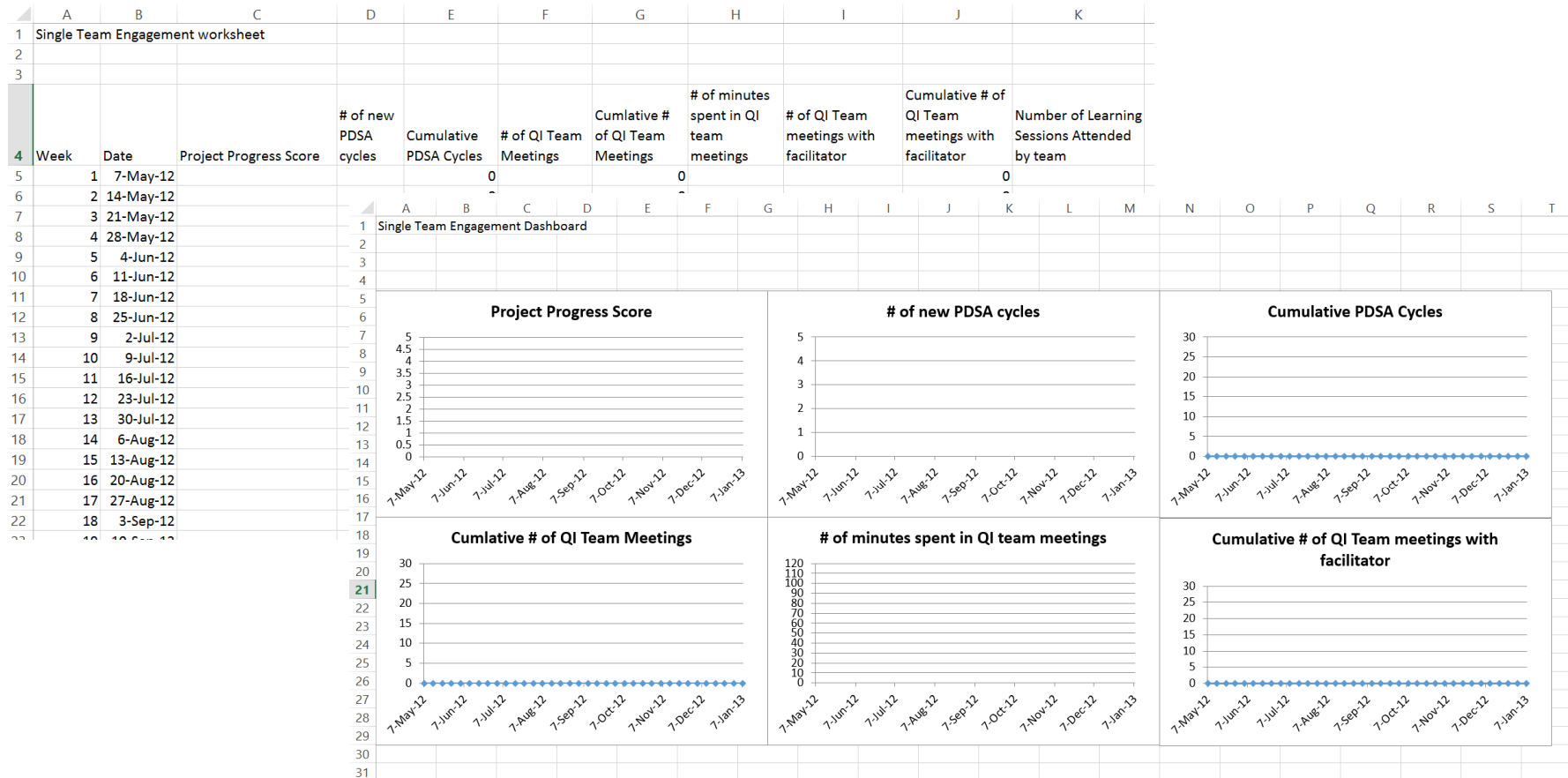
HOW DO WE MANAGE THIS JOURNEY?

What's there to manage?



- Engagement with the process of improvement
 - Frequency of Learning Meetings (Team Meetings)
 - Pace of testing/use of learning cycles (PDSA)
 - Review of relevant data
- Quality of PDSA cycles
- Collection and analysis of content and improvement data
- Documentation of what works and what doesn't
- Overall Project Progress

Managing Improvement



Some recommended minimums



- Team Meetings focused on improvement, 1/week
 - Not less than 1 hour for team interaction
 - Does not include time necessary to accomplish the Do of the PDSA that week
- Frequency of use of PDSA, 1/week, especially in the early stages



PDSA CHECKLIST

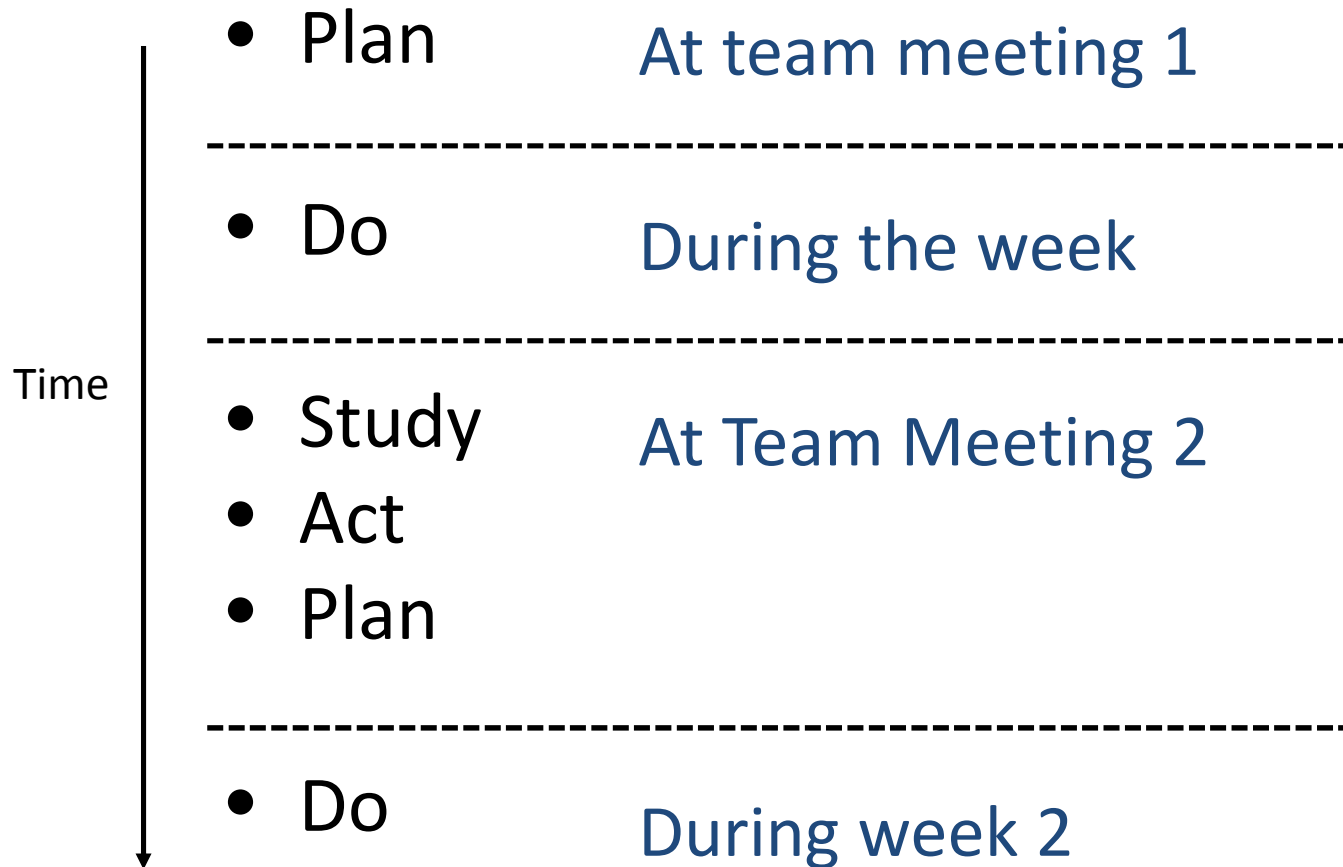


| | Quality Criteria | Details | PDSA sample 1 | PDSA sample 2 | PDSA sample 3 |
|-------|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|--------------------|--------------------|--------------------|
| | | For each criteria | Yes/No comments | Yes/No comments | Yes/No comments |
| PLAN | Learning question articulated? Questions posed? | Avoid yes/no questions. | | | |
| | Objective for cycle stated?* | | | | |
| | Prediction present? | If possible, with theory in use. | | | |
| | Change idea specified and developed?* | | | | |
| | Data collection plan? Logistics outlined? Data needed, articulated, or specified? | Ideally, framed as related to predictions. | | | |
| DO | Execution yes/no? Change tested or implemented?* | | | | |
| | Data collected or reported?* | | | | |
| STUDY | Did they compare what happened with their predictions? | | | | |
| ACT | New learning or theory refinement? | From the action phase: did they specific new learning or refine something about their theory? | | | |
| | Suggested next steps? | | | | |
| | | Score = x/10 Yes = 1 No = 0 | | | |

Notice how much detail of the checklist is devoted to getting to a good PLAN

*at least one of these should be clearly tied o subject matter

Practically, PDSAs look like



Documenting what works, and doesn't



| Level | | Specific Driver addressed in the PDSA cycle: | | | | | | | Improvement Facilitator Name: | | | | Improvement Project Aim: | | | | |
|--------------------------|------------------|----------------------------------------------|---------------------------------------|----------------|------------------|-----------------------------------|----------------------------------------|--------------------------|-------------------------------|----------------------------------|---------|---------------------|------------------------------|--------------|------------------------------|-----------------------------|---------------|
| 1 = Learning/Development | 0 = Data related | 5 = Driver 5 | | | | | | | | | | | | | | | |
| 2 = Testing | 1 = Driver 1 | 6 = Driver 6 | | | | | | | | | | | | | | | |
| 3 = Implementation | 2 = Driver 2 | 7 = Driver 7 | | | | | | | | | | | | | | | |
| 4 = Spread | 3 = Driver 3 | | | | | | | | | | | | | | | | |
| | | | Plan | | | | | Do | | Study | | | Act | | | | |
| Date | PDSA Cycle # | Level | Specific Driver addressed in the Test | Test Cycle Aim | Change Concept # | Description of Change Idea Tested | Test Cycle Measures/Learning Questions | Predicted Cycle Outcomes | Capture Relevant Data | Observations expected/unexpected | Results | Test Cycle Learning | Test Cycle successful Yes/No | Action Taken | Alternate Pathways Uncovered | Test Cycle completed Yes/No | If No, reason |
| | | | | | | | | | | | | | | | | | |
| | 1 | | | | | | | | | | | | | | | | |
| | 2 | | | | | | | | | | | | | | | | |
| | 3 | | | | | | | | | | | | | | | | |
| | 4 | | | | | | | | | | | | | | | | |
| | 5 | | | | | | | | | | | | | | | | |
| | 6 | | | | | | | | | | | | | | | | |
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| | 17 | | | | | | | | | | | | | | | | |
| | 18 | | | | | | | | | | | | | | | | |

During the baseline period simply track your measure of interest passively and note any barriers to engaging the activity of

Qualitative Evidence at the PDSA cycle level

Quantitative

Project Progress Score Rubric

Apply these criteria to your improvement project. Select the definition that best describes the progress of your project. Please note that assessments are progressive. For example, all elements of a score of 3.0 must be satisfied before rating your project with an assessment of a 3.5 or higher. Evidence for your assessment must be documented in your monthly report or in another knowledge management tool.

| Project Progress Score | Operational Definition of Project Progress Score |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0.5 – Intent to participate | Project has been identified, but the charter has not been completed, nor has a team been formed |
| 1.0 – Charter and Team established | A charter has been completed and reviewed by relevant stakeholders. Individuals or teams have been assigned, but no work has been accomplished |
| 1.5 – Planning for the project has begun | Organization of project structure has begun (such as: what resources or other support will likely be needed, where will the team focus first efforts, tools/materials have been gathered, meeting schedules/routines have been developed) |
| 2.0 – Activity, but no changes | Initial cycles of learning for the team have occurred (project planning, measurement, data collection (i.e., baseline data), study of/production of process maps has occurred, other investigative tools have been employed (i.e., cause and effect diagrams, Pareto analysis, etc.), theory has been formulated (i.e., initial Driver Diagram produced) |
| 2.5 – Changes tested, but no improvement | Initial cycles for testing changes have begun. Most project goals have a measure established to track progress. Measure(s) is/are graphically displayed with targets included |
| 3.0 – Modest Improvement | Successful tests of changes have been completed for some components of the theory described in the team's charter. Some small scale implementation has been done. Anecdotal evidence of improvement exists. Expected results are 20% complete. See note 1 |
| 3.5 - Improvement | Testing and implementation continues and additional improvement in project measures towards goals is seen |
| 4.0 – Significant Improvement | Expected results achieved for major subsystems, implementation (training, documentation, standard work, etc.) has begun for the project. Project goals are 50% or more complete. See note 2 |
| 4.5 – Sustainable Improvement | Data on key measures begin to indicate sustainability of impact of changes implemented in system (i.e., 9-12 data points over time at the new level of performance) |
| 5.0 – Outstanding Sustained Results | Implementation cycles have been completed and all project goals and expected results have been accomplished. Organizational changes have been made to accommodate improvements and to make the project changes permanent |

Notes

- 1) This may mean either (a) 20% of the project numeric goal(s) have been met or (b) each process measure is showing 20% improvement toward goal
- 2) This may mean either (a) 50% of the project numeric goal(s) have been met or (b) each process measure is showing 50% improvement toward goal

* Adapted from API Improvement Advisor Project Progress Assessment Scale

Break out



How do we stack up? And, what is our plan moving forward?

- Pace of learning cycles?
- Presence and use of data?
- Project Progress? (Remember we are in this for the learning not the judgment)
- Documentation of learning – what works and doesn't work (others can benefit from both)



Thank you

