Quality Improvement Basics Course Facilitator Guide

December 2019

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Overview

In support of the Health Resources and Services Administration (HRSA) Federal Office of Rural Health Policy (FORHP), the Rural Quality Improvement Technical Assistance Center (RQITA) at Stratis Health has developed a series of modules that comprise the Quality Improvement Basics Course. The module content, including video recordings, templates, and examples, covers such topics as convening and facilitating a quality improvement team, the model for improvement, Plan-Do-Study-Act, process mapping, root cause analysis, change management, and data analysis.

This resource is meant to serve as a guide for individuals interested in convening a peer sharing cohort focus on the Quality Improvement Basics course. Such a convening will allow participants to meet in person or virtually a pre-determined number of times to engage in facilitated networking discussion regarding application of the course concepts in their own settings and to problem solve experiences or anticipated barriers. In the format proposed here, participants are expected to complete a review of a given set of modules before each meeting and come prepared to discuss what they learned, share examples, and pose questions to the group. Facilitators must review all the content in the course thoroughly before convening a peer sharing cohort.

Included in this guide are:
- A detailed course outline, including module titles and information, and links to the video recordings and related tools and templates.
- A link to a sample course syllabus based on convening a group four times to review content
- Suggested prompts for driving discussion for each module

Course Outline

The following is the course outline in the order it is posted on the course website. Please note that while the course does have a natural flow, each module can stand alone, and you may choose to rearrange the order of completion for your purposes. For each module, there is a recording and a PDF of the related slides. Many of the modules have additional tools or templates that are reviewed in the recording. Tools and templates are provided in Word format so that they can be adapted for use and include instructions.

Quality Improvement Basics Course: Overview
Describes each of the modules and related learning objectives that make up the QI Basics course.
Quality Improvement Modules Overview (9-minute video)
Quality Improvement Modules Overview slides (8-page PDF)

Quality Improvement Foundational Concepts
Defines quality improvement in the context of health care, including how to identify and prioritize potential projects.
Quality Improvement Foundational Concepts (33-minute video)
Quality Improvement Foundational Concepts slides (17-page PDF)
PICK Prioritization Matrix (5-page Word doc)

Team Concepts
Underscores the importance of teamwork in driving quality improvement, including desired qualities and qualifications of team members, as well as team roles and responsibilities.
Team Concepts (17-minute video)
Team Concepts slides (12-page PDF)
Project Charter (3-page Word doc)
Work Plan (3-page Word doc)
Team Roles and Responsibilities (5-page Word doc)

Communication and Facilitation
Covers concepts to help improve the communication and understanding within a team using the shared mental model, standards of effective communication, and conflict resolution techniques.
Communication and Facilitation (15-minute video)
Communication and Facilitation slides (11-page PDF)
Communication Plan (3-page Word doc)

Change Management Basics
Considers the impact of change on quality improvement work from both an individual and an organizational perspective.
Change Management Basics (11-minute video)
Change Management Basics slides (8-page PDF)

Change Management Models and Tools
Reviews popular change management models and tools, including:
- Organizational Equilibrium and the Force Field tool

- The Eight Steps to Change
- The SWITCH Model – Lessons from a Change Analogy

Change Management Models and Tools (17-minute video)
Change Management Models and Tools slides (12-page PDF)
Force Field Analysis (5-page Word doc)

The Model for Improvement and PDSA

Focuses on The Model for Improvement as a quality improvement framework and using the Plan Do Study Act (PDSA) tool to complete rapid-cycle tests of change.
The Model for Improvement and PDSA (30-minute video)
The Model for Improvement and PDSA slides (18-page PDF)
5 Whys Worksheet (3-page Word doc)
PDSA Worksheet (8-page Word doc)

Process Mapping

Guides the creation of step-by-step process maps to help teams understand how processes are executed and identify opportunities for improvement.
Process Mapping (25-minute video)
Process Mapping slides (15-page PDF)

Data Basics and Data Collection

Explores methods of data collection, including how to select or create appropriate measures, both quantitative and qualitative.
Data Basics and Data Collection (20-minute video)
Data Basics and Data Collection slides (12-page PDF)
Data Collection Plan (3-page Word doc)
Measure Collection and Monitoring Plan (3-page Word doc)

Data Analysis and Data Display Methods

Reviews data analysis techniques and considers options for visualizing data with charts, graphs, and tables.
Data Analysis and Data Display Methods slides (18-minute video)
Data Analysis and Data Display Methods (10-page PDF)

Pulling It All Together

Brings together the many lessons from all the previous modules and resources by telling a Quality Improvement story using a "real world" example.
Pulling It All Together (46-minute video)
Pulling It All Together sides (24-page PDF)

Discussion Prompts

The following are potential discussion prompts and activities to use for each of the modules when convening your peer learning network. This list is by no means exhaustive; be creative and do what works best for your group.

Quality Improvement Foundational Concepts
- Does your organization have a specific approach to quality improvement? (e.g., PDSA, Model for Improvement, Lean Six Sigma, etc.)
- Review the concepts from slide #6 around the ideal quality improvement process versus what often happens. Ask participants to reflect on quality improvement projects that have been poorly planned or executed. Why do things happen that way, and what are the consequences?
- Ask participants to reflect on whether they feel their organization operates within a Just Culture. How does that impact their quality improvement work?

Team Concepts
- Ask participants to share the various ways their quality programs are organized as far as the team. Do the roles discussed in the module seem to align with the roles in their organizations?
- Ask participants - what is something new you might try based on what you learned from the *Team Concepts* module. For example, which roles are typically included in your QI, and which ones do you feel are missing or need to be added in your current or next project?

Communication and Facilitation
- Ask participants to share the various ways their quality programs are organized as far as communication and facilitation. Do their teams have a good "shared mental model" of the processes they carry out?
- Ask participants to come prepared to share their *elevator speech*:
  - We are focusing on *[insert]*. It is important that we improve *[insert]* because *[insert]* will improve the health of our community. We need you to support our efforts by *[insert]*.
- Ask participants if they are familiar with or utilize SBAR. Ask for examples.
- Ask participants - what is something new you might try based on what you learned from the *Communication and Facilitation* module. Example: have you used a communication plan to make sure internal and external stakeholders are being informed and educated about your work?

Change Management Basics
- Ask participants to reflect on where they fall as individuals on the *Adopters of Change* curve. Where does their organization fall?
- Ask participants to reflect on the change management success factors and identify which they think pose the most significant challenges to their organization:
  - Leadership commitment
  - Focus on the path to your goals
  - Attend to the technical and personal aspects of change
  - Recognize individual adaptation approaches

- Has Change Management been considered as part of your work, and how the QI work will impact your organization from this perspective (both for individual roles and the organization as a whole)?

Change Management Models and Tools
- Ask participants to think of an example of a transition or change at work that was managed well and one that was managed poorly. In both cases:
  - Consider the driving and restraining factors at work using the *Force Field Analysis*.
  - Does your example reflect the *Eights Steps to Change (Kotter Model)*? What steps proved to be challenging?
- Ask participants – What are some examples of driving and restraining forces around quality improvement work at your organization? How might using the tool assist in addressing the restraining forces and leveraging the driving forces?
- Discuss how you might employ the Kotter 'Eight steps to change' model and how it might change the way you approach your QI work.
- Ask participants to share how they celebrate successes with their teams. What has been the impact of those celebrations?

The Model for Improvement and PDSA
- Ask participants to think about previous quality projects they've participated in. Did they utilize the PDSA model? If not, how could the PDSA model have been applied?
- Ask participants to reflect on obstacles or barriers (real or perceived) that might stand in the way of utilizing the PDSA model for quality projects?
- Discuss a QI project (current, prior, or forthcoming) from the perspective of asking the three major questions from the Model for Improvement. Are all three questions fully answered by the way you have done or plan to do QI work/projects?

Process Mapping
- As a group, walk through a process mapping exercise using a simple, everyday example, such as making coffee or making toast. Follow the steps outlined in the module. Debrief the exercise with the group. What was surprising?
- Ask participants to share examples of process mapping for their organization. What have they learned from utilizing this process? Does it help to create a shared mental model for the team?

Data Basics and Data Collection
- Ask participants how their organizations manage data collection, analysis, and sharing. Who is the go-to person for data at the organization? What skills or knowledge do they have?
- Does your QI work rely mostly on qualitative or quantitative analysis and evaluation (or both)? What do you feel are the benefits of each method, as well as combining both approaches?

Data Analysis and Data Display Methods
- Ask participants to think of a data visualization example from a quality project they participated in. What story were they trying to tell, and who was the audience? What kind of visualization did they use, and what tools did they use to create it?

- Discuss the benefits your QI team could derive from putting effort into creating effective data visualizations to share with your leadership and/or project stakeholders? How might using these tools benefit your work?

Pulling It All Together

- Ask participants to think of an example of a project they are planning or working on. What are the anticipated challenges? What tools from this course would be helpful?
- As you look at each component of the course, which modules do you feel are used and effective in your QI work and methodology, and which new concepts/modules would you like to introduce and educate your team/staff on?