

# Plan-Do-Study-Act Cycle and QI Tools: Part 1



Missouri Virtual Learning Opportunity #3

August 24, 2020

# Agreements for Our Time Together

- ✓ Remain **available-to-be-on-mic**. You can mute while others are speaking/presenting, but be ready to participate.
- ✓ Remain **on-camera** as you are able.
- ✓ Avoid **distractions** as you are able.
- ✓ Feel free to **raise your hand** in Zoom using feature in participant list or on camera.
- ✓ Have the **chat** open and use it as needed.
- ✓ Have **fun!**

# Welcome and Introductions



Identify

QI tools that can be used in the Plan Stage.

Explore

Tools and related resources.

Engage  
and  
Learn

Together!

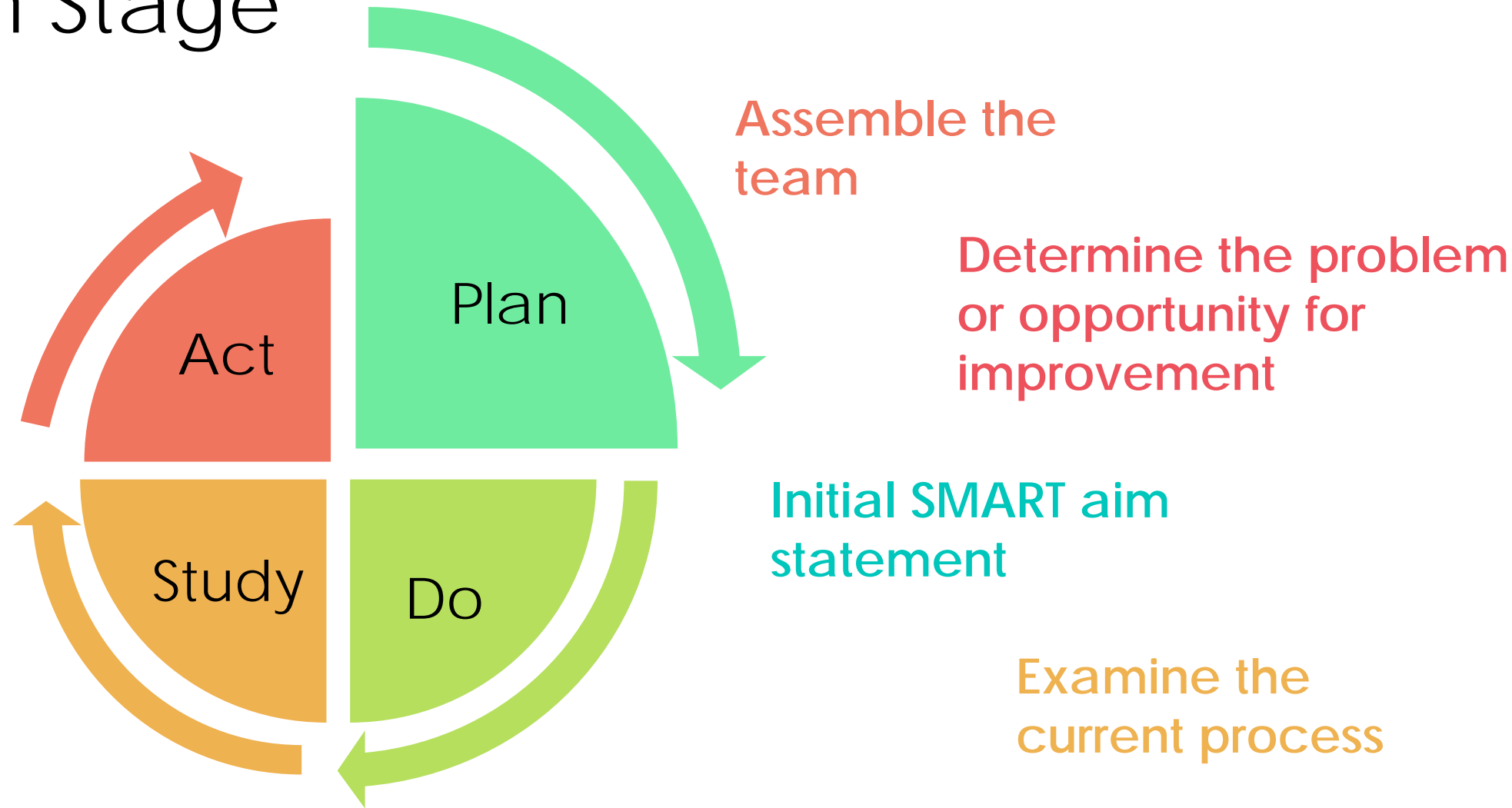


Our Time  
Together



# Plan Stage: Quality Improvement Tools

# The Plan Stage



# QI Teams – From “Me” to “We”

- A team approach is **ESSENTIAL** to any formal improvement effort
- QI team member **roles** and **agreements** will support “we” not “me”
- Regular **team meetings** (bi-weekly) support maintaining momentum

# Who to consider for your team:

---

Program Director/Manager

---

Program Coordinator

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Supervisors

---

Home Visitors

---

Data Manager/ Clerk

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Administrative Assistant

---

Families/ Partners

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Other roles not captured



# Roles for QI Teams



Leader/  
Facilitator



Data/ Information  
Liaison



Document  
Manager



Meeting  
Scribe



Meeting  
Scheduler



Subject  
Matter Experts

Plan Stage

Team Charter

SMART Aim

Process Map

# All team members...

 Identify opportunities for improvement

 Help team understand how current process works

 Brainstorm reasons why the problem may exist

 Brainstorm potential solutions that could support improvement

 Support testing the change

 Help team understand how test went



# Tool #1: Team Charter

# Keeping your PDSA Cycles Organized

- Helps ensure that the cycle runs smoothly.
- Keeps your QI team moving forward.
- Establish a meaningful structure for team members to be productive and successful.
- This can be done through different ways:
  - QI Team Charter
  - QI Tool Documentation
  - Story Board

**What has your QI Team done to help keep a PDSA cycle organized?**

# QI Team Charter

- A new tool to help your QI team stay organized!
- This tool can be used instead of the CQI Project Plan Template.
- Provides a roadmap for your PDSA cycle and helps to reduce the “now what?” feeling
- Helps the team come to agreement

# QI Team Charter

- Used from day one through the end of the PDSA cycle
- Helps the team stay organized by tracking:
  - Problem/Opportunity For Improvement
  - Team Members/Roles/Agreements
  - PDSA Cycle SMART Aim Statement
  - Process being targeted for improvement
  - Measure(s) for improvement
  - Actions taken in Do, Study, and Act

# Team Charter Tool

## Quality Improvement Team Charter

**Team Name:** Click here to enter text.

**Date Created:** Click here to enter a date.

**Last Date Updated:** Click here to enter a date.

**Subject:** (What area/aspect of your work are you focusing on? This should be broad like. Outreach, Training, Referrals, etc.): Click here to enter text.

**Problem/Opportunity Statement:** (What problem will be addressed by the team through this improvement effort?): Click here to enter text.

**Team Members:** (Who will be carrying out and supporting this PDSA Cycle? Please update as needed with staff turnover and role changes.)

Team Members (Full Name):	Position in Program/Organization/Group:	Role on QI Team:
<i>Example: Kim Smith</i>	<i>Supervisor</i>	<i>Document Manager</i>
Click here to enter text.	Click here to enter text.	Facilitator
Click here to enter text.	Click here to enter text.	Meeting Scribe
Click here to enter text.	Click here to enter text.	Data/Information Liaison
Click here to enter text.	Click here to enter text.	Document Manager
Click here to enter text.	Click here to enter text.	Meeting Scheduler
Click here to enter text.	Click here to enter text.	Subject Matter Resources
Click here to enter text.	Click here to enter text.	Team Leader
Click here to enter text.	Click here to enter text.	Team Sponsor
Click here to enter text.	Click here to enter text.	Other

**QI Team Meeting Frequency:** (How often will the team meet to work on this improvement effort? Will meetings take place in-person? In another way? How will the team communicate between meetings?): Click here to enter text.

**Process Improvement Area:** (What is the specific current process the team will work to improve through this PDSA cycle? Describe how the current process works and include information on what the team identified as working well and not working as well as you would like. Highlighting gaps, areas of rework, etc. will support the team in honing in on a specific area for improvement for this PDSA cycle.): Click here to enter text.





# QUESTIONS?



## Tool #2: SMART Aim Statements

# State Priority Focus Area

- Missouri DHSS establishes a State Priority Focus area for the year and provides a priority aim statement to the LIAs.
- Each LIA works towards improvement based on the aim statement from DHSS.
- Each LIA should conduct PDSA cycles, with project specific SMART aims, that relate directly to the State Priority Focus area.
- However! Teams can also and should conduct PDSA cycles around your own processes, procedures, and data.

# What is an Aim Statement?

- A concise, specific, written statement that defines precisely what the team hopes to accomplish with its QI efforts.
- Aim Statements...
  - Include a **numerical** measure for the target
  - Are **time specific** and **measurable**
  - Define the **specific population** that will be affected

## Structure of an aim statement:

By **(month) (day), (year)**, the **(program/department name)** will **(increase or decrease)** the (process/outcome targeted for improvement) from **(# or %)** to **(# or %)**.

# Developing a SMART Aim Statement

- When writing your Aim, remember to ask these two key questions:
  1. What are we trying to accomplish?
  2. How will we know that a change is an improvement?
- The SMART method is reliable and useful, and provides a clear picture of exactly how a team will meet their goal



# Developing a SMART Aim

Specific

S

Who are the target population and persons doing the activity?

What is the action or activity?

Measurable

M

How much change is expected?

Will there be an increase or decrease?

Can you measure it?  
If so, how will you?

Achievable

A

Can it be done?

Can you accomplish it in the prescribed timeframe?

Do you have resources?

Relevant

R

Does the action relate to what you want to accomplish?

Is it important and meaningful?

Does it relate to broader program or organizational goals?

Timed

T

What is the timeline for change?

When will the change be accomplished?  
Month, day, time, or year?

*SMART Aim Statement Development Tool*

Plan Stage

Team Charter

SMART Aim

Process Map

# Which SMART criteria is missing from the aim statement?


Go to [www.menti.com](https://www.menti.com) and use the code 44 67 38

**The home visiting program will decrease missed visits from 70% to 40%.**



# Resource for Developing SMART Aim Statements

- The SMART method facilitates a clear picture of exactly what the team will be working towards.
- The method is reliable and useful in writing aim statements.



Developing a SMART Aim Statement Worksheet	
Aim Statement Criteria	Developmental Questions
<b>S</b> pecific	Who are the target population and persons doing the activity? What is the action or activity?
<b>M</b> easurable	How much change is expected? Will there be an increase or decrease? Can you measure it?
<b>A</b> chievable	Can it be done? Can you accomplish it in the prescribed timeframe? Do you have resources?
<b>R</b> elevant	Does the action relate to what you want to accomplish? Is it important & meaningful? Does it relate to broader program or organizational goals?
<b>T</b> ime-Bound	What is the timeline for change? When will this be accomplished? Month, day, time, or year?
<b>Aim Statement</b>	Write your SMART aim statement below:





# QUESTIONS?

Plan Stage

Team Charter

SMART Aim

Process Map



Break

# Tool #3: Process Map

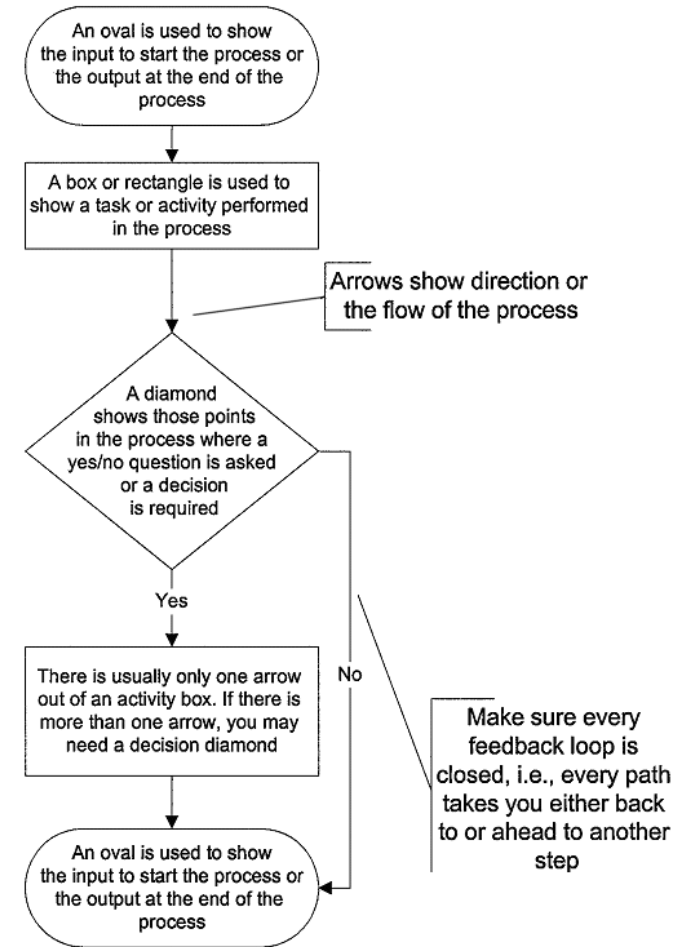
# QI Works on Existing Processes

- A process is a series of steps or actions performed to achieve a specific purpose.
- A process describes the way things get done.
- Work involves many processes.

What other existing processes do you partake in at work?

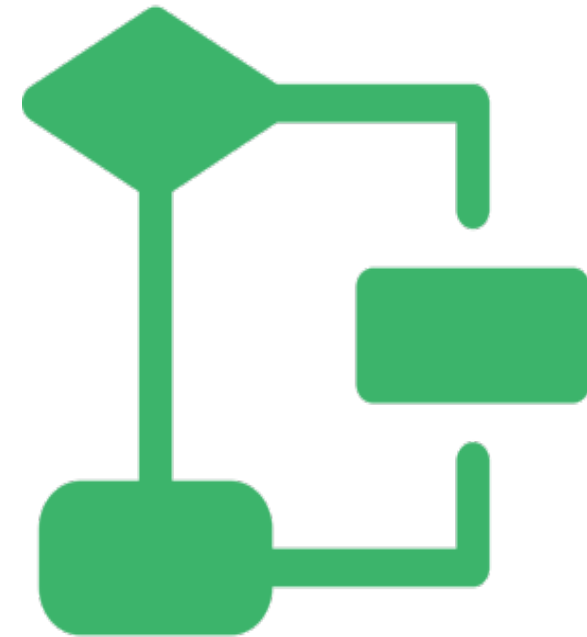
# A Tool to Examine Process Flow: Process Mapping

- A diagram of the steps taken to get a job done
- Sometimes called flowcharting



# Process Maps are Used to:


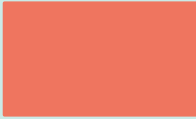
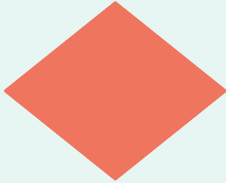

- Document the way work is done
  - Provide a reference to discuss how things get done
  - Describe and understand the work
  - Identify the connections between activities
- Analyze and improve processes
  - Identify areas of complexity and re-work
  - Generate ideas for improvement
  - Illustrate process improvements



# Preparing to Process Map

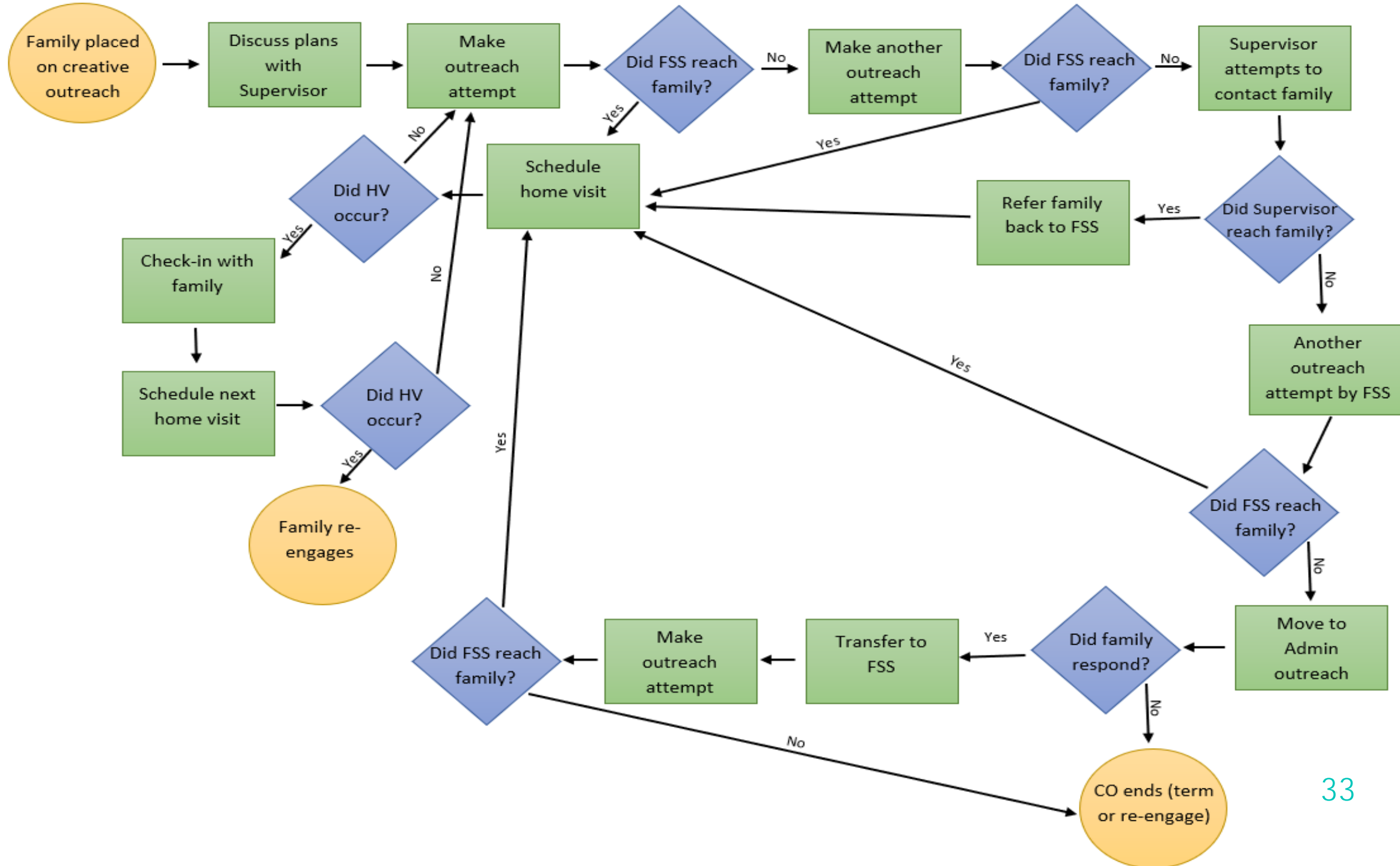
1. • Determine which process needs to be documented
2. • Agree on where the process begins and ends and level of detail
3. • Create a list of the steps taken in the current process
4. • Construct the process map by using shapes and ordering the steps
5. • Interpret your process map
6. • Identify additional staff to review or provide input on the process map

# Symbols used to Process Map

Start & End		An <b>oval</b> is used to show the materials, information or action (inputs) to start the process or to show the results at the end (output) of the process.
Activity		A <b>box or rectangle</b> is used to show a task or activity performed in the process. Although multiple arrows may come into each box, usually only one arrow leaves each box.
Decision		A <b>diamond</b> shows those points in the process where a yes/no question is being asked or a decision is required.
Flow		An <b>arrow</b> shows the direction or flow of a process.



# Example Process Map



# Interpreting Process Maps

What steps are done differently by different people?

Where in the process do hand-offs occur?

What steps are confusing or cumbersome?

What steps seem unnecessary?

Make notes of what you learn – these conversations could provide direction for your improvement!



## A Few Hints and Tips

- Map the **current** process!
- It's okay if team members have different ideas about how the process works.
- Keep steps simple; begin each step with an action verb.
- Process mapping is **dynamic**!
  - In the virtual space, share your screen, use MS power point or MS word
  - When in-person, you can use Post-it notes, dry-erase markers, & pencils are your friend!

# Process Map Development Tool



## Using a Process Map to Examine Current Process

### Developing a Process Map

1. • Determine which process needs to be documented
2. • Agree on where the process begins and ends and level of detail
3. • Create a list of the steps taken in the current process
4. • Construct the process map by using shapes and ordering the steps
5. • Interpret your process map
6. • Identify additional staff to review or provide input on the process map

#### Step 1:

As a team, consider the problem you are working to tackle through your PDSA cycle and the processes that are related to the problem. List the related processes here:

•

•

Review the above processes and determine which **current** process you need to map as a team. The process you map should be the one that is most closely related to the problem you are working to tackle through your PDSA cycle. Note the process you will map here:



## Breakout Activity

- Process Map Breakout!
- In your breakout group, practice mapping baking cookies.

**What is the process for  
baking cookies?**

- Use the process map worksheet as your guide.
- We will come back together and discuss!



# QUESTIONS?

Plan Stage

Team Charter

SMART Aim

Process Map

Next Learning Opportunity:  
August 25<sup>th</sup> @10am

Thank you!

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