MIECHV Gateway
EXAMPLE CQI PROJECT PLAN

STAGE 1: PLAN • STAGE 2: DO • STAGE 3: STUDY • STAGE 4: ACT

Project Title: Improve Client Satisfaction Survey Participation
Project Start Date: 10/01/15
Project End (or expected end) Date (mm/dd/yy): 03/01/16
County: Boone

STAGE 1: PLAN

Define, explore, and structure a quality improvement project.

1. What problem are you trying to fix (PROBLEM STATEMENT)? Increase client participation completed responses in the annual client satisfaction survey.
2. What is the root cause of the problem? Lack of reminders to clients to fill out and submit the surveys, lack of defined deadlines for submissions, access to post office, and client incentives for completing the survey.
4. What change do you want to see in the process or problem to correct (GLOBAL AIM STATEMENT)? To garner feedback from current and past clients to continually improve services.
5. What are you trying to achieve (SPECIFIC AIM)? To increase client participation and response to the 2016 annual satisfaction survey from 57% to 75% by the end of the 2016 survey reporting period.
7. Select the affected population(s) (check all that apply: □Client/Consumers □Employee/Agency □General Public □Other:
8. Select the areas where this project aims to impact the goals and strategic priorities of the MIECHV program and agency:

<table>
<thead>
<tr>
<th>Impact Area</th>
<th>MIECHV Program</th>
<th>University of Missouri-Columbia</th>
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<tbody>
<tr>
<td>Access to Care</td>
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<td>Care Coordination</td>
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<tr>
<td>Communication &amp; Education</td>
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<td>Compliance</td>
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<td>Customer Service/Satisfaction</td>
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<td>Employee Communication &amp; Collaboration</td>
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<td>Employee Engagement/Satisfaction</td>
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<td>Employee Productivity</td>
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<td>External Stakeholders/Agency Engagement and/or Collaboration</td>
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<td>Facilities</td>
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<td>Financial</td>
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<td>Health Outcomes/Behaviors</td>
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<td>Information Technology</td>
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9. Do you have the resources to fix the issue?  Yes  No

10. What resources (new & existing) will you require and how will you acquire them?  Technology (new) and administrative (existing) resources are required. The technology software (SurveyNOW) is provided at no-cost to not-for-profit organizations. Redirection of cash flow from mailing surveys with pre-paid envelopes to providing a completion incentive.

11. Does the project aim align with MIECHV goals?  Yes  No

12. Does the project aim align with your agency’s strategic goals?  Yes  No

13. List the members of the CQI project team:

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
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<tbody>
<tr>
<td>Jane Arthur</td>
<td>Project Leader</td>
</tr>
<tr>
<td>Joe Smith</td>
<td>Project Member</td>
</tr>
<tr>
<td>Anne James</td>
<td>Project Member</td>
</tr>
<tr>
<td>Ryan Waters</td>
<td>Project Member</td>
</tr>
<tr>
<td>Jason Oliver</td>
<td>Facilitator/Advisor</td>
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</table>

14. Incorporating the information gathered throughout the planning process, describe the action plan: Low response rates to the annual satisfaction survey were caused by: staff, procedures, clients, and forms. By redesigning this process and making improvements to address the causes, the response rate and satisfaction with the process is expected to increase.

15. Begin constructing a CQI Storyboard. Date started: 10/01/15

**STAGE 2: DO**

**Develop and structure the new change/process to all areas for improvement**


16. Who will implement the change?  Jane Arthur

17. How and to whom do you plan to implement the change and how will this be communicated?  Jane Arthur will disseminate the new process to supervisors and leadership to implement with all home visitors. Email communication will be used along with updates and discussion at weekly agency-wide meetings.

18. Will you conduct a pilot study prior to full-scale implementation?  Yes  No

19. How will you track and measure change (describe data measurement systems)?  Adoption of SurveyNOW software to track response rates in real-time.

20. How will you spread and maintain the new process/change?  Support from leadership and supervisors paired with ongoing status updates.

21. Incorporating the information gathered throughout the implementation process, describe the implementation plan: Adopt and install an electronic survey management system (SurveyNOW) to distribute, collect, and report client satisfaction surveys. Implement a survey completion incentive. Implement and share the changes across the agency to streamline the process. Modify agency procedures and communicate changes to leadership and agency staff.

**STAGE 3: STUDY**

**Develop and define the plan for evaluating the quality improvement project**


22. How will you monitor progress and how often?  Weekly, through the analytics report
23. Define how you will check and verify accuracy of the results: Metrics will be defined and reviewed in the SurveyNOW software. Monthly agency-wide review of reports to verify accuracy.
24. Who will be responsible for maintaining the change? Joe Smith will run the weekly report and prepare the monthly reports for the agency.
25. How often will you review the process for needed improvements? Ongoing, initial modifications to the software are expected. Once established, quarterly reviews of necessary updates/upgrades to survey software will be reviewed at the leadership level.
26. How will you address any new areas for improvement? At the conclusion of this project, the project team plans to document and review all software modifications along with survey reporting and results on a quarterly basis.
27. Incorporating the information gathered throughout the evaluation process, describe the evaluation plan: Evaluation of response rates will be gathered by Joe Smith from SurveyNOW reports. These reports will be reviewed monthly by all agency employees to verify the reporting accuracy. Initially, reporting will be focused on response rates to ensure this improvement is successful with future modifications and report analysis planned.

**STAGE 4: ACT**

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<tr>
<th>Action</th>
<th>Completed Date</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Share the status and results of the project with team members/leadership/stakeholders.</td>
<td>02/15/16</td>
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<tr>
<td>Discuss the future of this project/change (i.e. future projects, varying approaches, etc.). Future projects may surround building comparison reports to identify areas within the client satisfaction survey where specific measures can be compared across time.</td>
<td>02/26/16</td>
<td>Not Applicable</td>
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<tr>
<td>Update the organizational process map to reflect the change(s).</td>
<td>02/19/16</td>
<td>Not Applicable</td>
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<tr>
<td>Update organizational policies and procedures to reflect the change(s).</td>
<td>02/19/16</td>
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<tr>
<td>Finalize the CQI Storyboard and submit in the MIECHV Gateway (LINK).</td>
<td>03/01/16</td>
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**Notes:**

The following notes illustrate the stepwise approach to initiate and complete a CQI Project using the tools on the MIECHV Gateway.

**Background**

The UM Home Visiting Program in Boone County, Missouri is facing a challenge in garnering acceptable level of client responses to the annual client satisfaction survey. Presently, the survey is conducted after the client has been discharged from the program, either after program completion or dropout. The program uses printed survey forms paired with pre-paid envelopes. The forms are mailed to clients after discharge with instructions to mail the survey back to the agency. The current response rate to client satisfaction survey is 57% for 2015. Response rates from 2007-2014 were between 34-59%.

**Specific Aim**

To increase client participation and response to the 2016 annual satisfaction survey from 57% to 75% by the end of the 2016 survey reporting period.

**Stage 1: Plan**

To increase the response rate to the client satisfaction survey, the CQI project team began by meeting in-person to evaluate the current state of the problem. At the first meeting, a brainstorming session was conducted to view possible root causes (Figure 1) for low response rates. The ideas were then grouped into four categories: staff, procedures, clients, and forms (Figure 2).
With the root causes identified, a Root Cause Analysis (a.k.a. Fishbone Analysis) was made to illustrate and identify possible causes (problems) for the low response rates (Figure 3).
With the team understanding possible causes for the low response rate, the team worked to identify a plan to improve response outcomes. In reviewing previous survey comments, numerous comments from clients indicated they were unsatisfied with the hassle of completing and mailing the paper survey. The team agreed on the need to shift the survey form to an electronic version and identified a free software program, SurveyNOW, to adopt. The software will address the barriers of mailing the survey, tracking responses, reminders to complete, and reporting analytics. The software will also save the agency time and money in mailing the paper surveys with pre-paid postage, which will flow into the participant incentive fund. The team agreed on the following action steps to modify the survey process:

1. Current clients will receive an emailed link to the electronic survey each year on the anniversary date of their initial enrollment to the program. Discharged clients will automatically receive an email with a link to the electronic survey when their status is updated to “Discharged” in the clients’ chart.
   a. If the survey is not completed, reminder emails are automatically sent once per week for up to two months after the first email.
   b. Each emailed survey invitation will inform the respondent of the chance to win a gift card for completing the survey.
   c. Respondents who complete the survey will be entered into a quarterly drawing (January, April, July, October) where names are randomized and selected with the winner being notified by email and/or phone.
2. Install and activate the SurveyNOW software.
   a. Verify translation of paper survey form content into the electronic survey.
   b. Discontinue the manually tracking of survey dissemination and return receipt.
   c. Reporting and analytics of SurveyNOW responses will be run weekly, monthly, quarterly, and annually.

Stage 2: Do
With the action plan identified, the team took the plan to UM leadership to garner support and feedback. Positive support and approval were received and the team began to implement the plan. Each team member was assigned to specific tasks within the action plan. The team met weekly for 30-60 minutes to review progress, seek feedback, and define the next steps. These updates were also shared at weekly agency-wide meetings to inform staff of the project progress. Resistance from staff was initially received, however resolved once the detailed plan was shared.
Stage 3: Study
It took the team two months to transition from paper forms to the SurveyNOW software which has now been successfully functioning and active for a total of three months. In review of the response rates, completed surveys increased to 74% in January 2016 and to 83% in February 2016 (Figure 4). In February 2016, the time for a client to receive and return a survey averaged 4 days. Current clients are reporting high satisfaction with the electronic format, ease of use, convenience, and friendly email reminders. Home visiting staff and supervisors report greater satisfaction with the improved automated workflow.

Figure 4: Client Satisfaction Survey Response Rates

![Response Rate Chart]

Stage 4: Act
Organizational policies, procedures, and process maps were updated to reflect the process change. Ongoing education to agency staff and the solicitation of feedback is regularly occurring. The team agreed improvements would continue to be made through the next year to monitor and maintain the achieved response rates, including collection and verification of client email addresses. The team identified the need to evaluate the reporting and analytics from SurveyNOW to better define the reports to annual reporting metrics, eliminating the need for translating the SurveyNOW reports for their accreditation requirements. Lastly, the team completed the CQI Storyboard (Figure 5) and uploaded it to the MIECHV Gateway’s CQI Storyboard Library.
**EXAMPLE MIECHV STORYBOARD**

**Improve Client Satisfaction Survey Participation**

*Agency: University of Missouri-Columbia  
Contact Person: Gateway Administrator  
Date Submitted: 03/01/2016*  

**Contact Email:** RickardD@Missouri.edu

<table>
<thead>
<tr>
<th><strong>1. AIM STATEMENT</strong></th>
<th><strong>2. PLAN</strong></th>
<th><strong>3. DO</strong></th>
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<tbody>
<tr>
<td>To increase client participation and response to the 2016 annual satisfaction survey from 57% to 75% by the end of the 2016 survey reporting period. The project began 10/1/15 and ended 3/1/16 with Jane Arthur as project leader.</td>
<td>Low response rates to the annual satisfaction survey were caused by: staff, procedures, clients, and forms. By redesigning this process and making improvements to address the causes, the response rate and satisfaction with the process is expected to increase.</td>
<td>Adopt an electronic survey management system (SurveyNOW) to distribute, collect, and report client satisfaction surveys. Implement a survey completion incentive. Implement and share the changes across the agency to streamline the process.</td>
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<th><strong>4. STUDY</strong></th>
<th><strong>5. ACT</strong></th>
<th><strong>6. FUTURE CQI</strong></th>
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| Response rates of completed/submitted client satisfaction surveys were collected from the SurveyNOW software in January 2016 were 74% and 83% in February 2016. | Organizational policies, procedures, and process maps were updated to reflect the process change. Ongoing education to agency staff occurs and regular solicitation of feedback. The team is monitoring response rates to maintain the achieved rates. | Future CQI:  
• Improve collection and verification of email addresses.  
• Align SurveyNOW reports with accreditation requirements to avoid duplication of work  
Lessons Learned:  
• Convenience was the major factor for low responses  
• Incentives also improved response rates |