

MODULE 18: UNDERSTANDING THE QI ENVIRONMENT**Time: 2.5 hours****Objectives:** Participants will be able to:

- ◆ Identify potential QI initiatives that are relevant to your healthcare facility
- ◆ Recognize the value of understanding the environment within which the QI effort will be initiated
- ◆ Explain various techniques that can be used to help understand the QI environment
- ◆ Use one or more tools presented in the module to better understand the environment in which the QI initiative will be situated

Materials: Materials required for this module are:

- ◆ Participant Manual
- ◆ Flipchart, easel, and markers
- ◆ Overheads 18-1 thru 18-2
- ◆ Quality improvement tools appendix
- ◆ Computer or overhead projector and projection screen

▶▶▶▶▶▶ **MODULE INTRODUCTION**

- OH 18-1
1. **DISPLAY** overhead 18-1.
 2. **REFER** participants to Module 18 in their manuals.
 3. **STATE** the following:

Now that our review of quality improvement concepts is complete, and we've looked at several cases to understand how quality improvement has been accomplished in other organizations, you're going to have an opportunity to begin identifying improvement opportunities for your own

organization and do some initial planning.

In this module we'll focus on the various tools and techniques that you can use to help better understand your environment once you have some possible projects in mind.

I'll provide a brief overview of the different tools, but the major portion of this module will be dedicated to having you work through a situation that is relevant.

4. **DISPLAY** overheads 18-2.

OH 18-2 5. **REVIEW** the objectives for the module.

▶▶▶▶▶▶ **CLIENTS DIAGRAM**

6. **REFER** participants to the Clients Diagram in their manuals.

7. **REVIEW** the Clients Diagram using the participant manual as a reference.

8. If needed, **DRAW** an example on a flipchart using an example provided by a participant.

▶▶▶▶▶▶ **SILENT MEMBERS SEATING CHART**

9. **REFER** participants to the Silent Members Seating Chart in their manuals.

10. **REVIEW** the Silent Members Seating Chart using the participant manual as a reference.

11. If needed, **DRAW** an example on a flipchart using an example provided by a participant.

▶▶▶▶▶ **FORCE FIELD ANALYSIS**

12. **REFER** the participants to the section on Force Field Analysis in their manuals.
13. **REVIEW** the Force Field Analysis using the participant manual as a reference.
14. If needed, **DRAW** an example on a flipchart using an example provided by a participant.

Note: Refer participants to the tools appendix for more information about conducting a force field analysis.

▶▶▶▶▶ **SWOT ANALYSIS**

15. **REFER** participants to the section on SWOT Analysis in their manuals.
16. **REVIEW** the SWOT Analysis using the participant manual as a reference.
17. If needed, **DRAW** an example on a flipchart using an example provided by a participant.

▶▶▶▶▶ **IDENTIFYING POTENTIAL QI OPPORTUNITIES**

18. **ASK** participants if they have identified a quality improvement project they would like to begin work on.
19. **ARRANGE** participants into groups that make sense. If several people are attending from one facility, have them work together. If participants are from different facilities group them together by interest or type of facility.
20. **ASSIST** participants who have not yet identified an initiative to focus on by guiding them through the **KNOWN CHANGE STRATEGIES** provided in Module 18 of their participant guides.
21. **EXPLAIN** that the **KNOWN CHANGE**

STRATEGIES are a thematic summary of the quality improvement efforts that have been conducted in the past. **EXPLAIN** that they are not limited to healthcare; many of the strategies have been used in manufacturing and other industries.

22. **ENSURE** that all participants have a group to work with and a potential project in mind.

▶▶▶▶▶ **MENTORED WORKING SESSION**

23. As participants work in their groups, **CIRCULATE** through the room and **ASSIST** as needed. Answer questions and provide coaching to the groups as they practice using the various tools in the module.

Note: Each team should practice using at least two of the tools presented in this module.

Note: Provide each team with flipchart paper and markers.

▶▶▶▶▶ **PRESENTATION OF ENVIRONMENTAL ANALYSIS**

24. **DEBRIEF** from the working session in a large group setting. Have each team present their work and accept feedback from the other teams.

Note: Provide a lot of positive reinforcement to each team.

MODULE 19: PLANNING THE QI INITIATIVE

Time: 3 - 4 hours

Objectives: Participants will be able to:

- ◆ Discuss what is entailed in planning
- ◆ Identify a quality improvement goal you hope to achieve and create a possible scenario for achieving it
- ◆ Explain how a Gantt chart can be used to manage a project
- ◆ Create a preliminary Gantt chart for the quality improvement initiative you have in mind

Materials: Materials required for this module are:

- ◆ Participant Manual
- ◆ Flipchart, easel, and markers
- ◆ Overheads (OH) 19-1 thru 19-4
- ◆ Computer or overhead projector and projection screen

▶▶▶▶▶ **MODULE INTRODUCTION**

- OH 19-1 1. **DISPLAY** overhead 19-1.
2. **REFER** participants to Module 19 in their manuals.
- OH 19-2 3. **DISPLAY** overhead 19-2. It says...
- “People don’t plan to fail, they just fail to plan.”
4. **ASK** participants if they agree or disagree with this statement. **FACILITATE** a discussion to emphasize the value of good planning.
5. **STATE** the following:
- The goal of this module is to help you become successful by helping you begin

planning the quality improvement initiative.

In this module, you're going to learn two planning techniques, and have an opportunity to use them, just as you had an opportunity to practice using the various tools to learn about your environment in the previous module. And like before, your classmates and I will provide you with feedback to make your plan stronger.

- OH 19-3 6. **DISPLAY** overhead 19-3.
7. **REVIEW** the objectives for the module.

▶▶▶▶▶▶ **WHAT IS PLANNING?**

- OH 19-4 8. **DISPLAY** overhead 19-4.
9. **EXPLAIN** that planning is the process by which individuals determine goals and devise means to accomplish them.
10. **DISCUSS** what this means in layman's terms.
11. **ASK** a volunteer to identify something they achieved and some of the thinking and planning that it took to accomplish it. Examples might include: getting a formal education (nursing certificate), purchasing or renting a home, taking a vacation, attending this program, etc.
12. **EMPHASIZE** the fact that achieving their goal required a "vision" or an idea of what it is that you want to achieve, and an identification of activities to achieve that vision or goal.
13. **EMPHASIZE** also, that planning begins once an environmental analysis has been performed, as they did in Module 18.

▶▶▶▶▶▶ **PLAN BACKWARDS**

14. **REFER** participants to the Plan Backwards section in their manuals.
15. **REVIEW** the details of Planning Backwards using the participant manual as a reference.
16. If needed, **DRAW** an example on a flipchart using an example provided by a participant.

▶▶▶▶▶▶ **GANTT CHARTS**

17. **REFER** participants to the Gantt chart section in their manuals.
18. **REVIEW** the details of Gantt charts using the participant manual as a reference.
19. If needed, **DRAW** an example on a flipchart using an example developed by the class.

▶▶▶▶▶▶ **MENTORED BACKWARDS PLANNING**

20. **ARRANGE** participants into the groups they worked with in Module 18.
21. As participants work in their groups, **CIRCULATE** through the room and **ASSIST** as needed as they plan backwards. Answer questions and provide coaching to the groups as they practice using the various tools in the module.

Note: Allow teams anywhere from 30 to 60 minutes to plan backwards- depending on their success with this activity.

Note: Provide each team with flipchart paper and markers.

▶▶▶▶▶ **PRESENTATION OF BACKWARDS PLANS**

22. **DEBRIEF** from the working session in a large group setting. Have each team present their “backwards plan” and accept feedback from the other teams.

Note: Allow each team about 10 minutes to present their plans.

▶▶▶▶▶ **MENTORED GANTT CHART CREATION**

23. Once each group has shared its backwards plan, **DIRECT** the groups to begin creating a Gantt chart for their projects.

Note: Allow each team another 30-60 minutes to begin creating the Gantt chart.

24. As participants work in their groups, **CIRCULATE** through the room and **ASSIST** as needed as they plan backwards. Answer questions and provide coaching to the groups as they practice using the various tools in the module.

Note: Provide each team with flipchart paper and markers.

▶▶▶▶▶ **PRESENTATION OF GANTT CHARTS**

25. **DEBRIEF** from the working session in a large group setting. Have each team present their Gantt chart and accept feedback from the other teams.

Note: Allow each team about 10 minutes to present their plans.

Note: Provide a lot of positive reinforcement to each team.

MODULE 20: REFLECTION AND GRADUATION***Time: 2 hours*****Objectives:** Participants will be able to:

- ◆ Discuss important insights and knowledge gained as a result of participating in the class
- ◆ Express a sense of confidence that they will be able to participate (to some level) in a quality improvement initiative

Materials: Materials required for this module are:

- ◆ Participant Manual
- ◆ Flipchart, easel, and markers
- ◆ Overheads 20-1 thru 20-2
- ◆ Computer or overhead projector and projection screen
- ◆ Graduation certificates

▶▶▶▶▶▶ MODULE INTRODUCTION

- OH 20-1
1. **DISPLAY** overhead 20-1.
 2. **REFER** participants to Module 20 in their manuals.
 3. **STATE** the following:

We've reached the last module of our program. In this final module, we're going to take a moment to reflect upon what we've learned and celebrate what we have and will be able to accomplish.
 4. **DISPLAY** overhead 20-2.
- OH 20-2
5. **REVIEW** the objectives for the module.

▶▶▶▶▶ **REFLECTIONS**

6. **POST** several (3 to 4 if possible) sheets of flipchart paper together on a wall to create a large sheet of paper.
7. **REFER** participants to page 20-2 in their manuals. Explain that the text free pages are provided for them to reproduce the reflections generated by them and their fellow participants.
8. **ASK** participants to share any and all reflections they have about quality improvement now that the course is complete. **WRITE** their reflections on the sheet of paper. Allow participants to offer their reflections at their own pace and build upon one another's ideas as in a brainstorming session.
9. **EMPHASIZE** how much was learned through the course and the achievements of the participants.

Note: Don't judge or correct reflections. Don't change participants' ideas when recording them.

▶▶▶▶▶ **COURSE EVALUATION**

10. **DISTRIBUTE** course evaluation.
11. **CREATE** a procedure for ensuring participants' evaluations remain anonymous and make participants aware of the anonymity procedure.
 - Ask a volunteer to collect questionnaires upon completion by participants.
 - Ask participants to fold questionnaires in half and place in envelope passed around by the volunteer. This will ensure responses remain anonymous.

Note: You will get more honest feedback from participants if they know ahead of time that their responses will be anonymous. Announce the procedure you will use before asking participants to complete the evaluation. Then adhere to that procedure.

▶▶▶▶▶ **GRADUATION CERTIFICATES**

12. **STATE** the following:

To acknowledge your hard work and the time we've spent together focusing on quality improvement, I'd like to present each of you with a certificate of graduation from this course. This certificate entitles you to the ability to look at your healthcare setting with a new pair of eyes, and look for ways it can be improved. It also entitles you the ability to initiate improvement projects and ask for help initiating those that might need more resources.

13. **CALL** each individual to the front of the room and **PRESENT** them with their certificate. Say something complementary about each person, e.g., earliest to class, most participative, best stories, etc.

▶▶▶▶▶ **QUALITY IMPROVEMENT PLEDGE**

14. **ASK** participants to stand, raise their right hand, and repeat after you the following pledge.

On my honor, I pledge to look for quality improvement opportunities at my facility, to explain the concepts of quality improvement to my colleagues, to be guided by quality improvement methodology, and to adhere to the four principles of quality improvement.

Note: The pledge is also provided in the participant manual at the end of Module 20.

15. **CONGRATULATE** participants on a successful course.

16. **PROVIDE** contact information and perform any other administrative activities required.