Quality Improvement 101, Part 3
Moving toward Better Care with QI Team Meetings

Hunter Gatewood
Improvement Advisor
Signal Key Consulting
QI = How do we do things better?

- **Focus**: Change at system *(clinic)* level; the Future
- **Goal**: Reliable, long-term processes that get us better results for population *(people)* we serve

- **Passion, purpose, constant learning**

QA = Are you doing things right?
(Did you ...) Write these down

**System** – the clinic, a set of processes

**Process** – start-to-finish steps of a flow of actions; fix process, don’t criticize staff. Never meant to cause you any sorrow, never meant to cause you any pain.

**Population** – all patients, all overweight patients, all patients with asthma, all sexually active patients

**Complex (versus Complicated)**

**Standardization** – Some things should be done the same way every time.
Every **system** (clinic) is perfectly designed to give the results that it gets.
What are we trying to accomplish?

How will we know that a change is an improvement?

What changes can we make that will result in improvement?

AIM

MEASURES

CHANGES

RAPID TEST OF CHANGES

From Associates in Process Improvement.
Primary care monthly improvement measures

Clinical quality examples

Percentage of patients ...

- Who received Well-Child Visit in past 12 months
- With asthma who have a written asthma action plan
- Who were screened for tobacco use
- Between ages x and y, who received immunization z
- Age 2 who received lead poisoning test by second birthday
Three uses of data

Research

Judgment

Improvement


**Improvement vs. Research Data**

**Learning and Improving**
- Apply New Knowledge
- **Methods**
  - Test observable
  - Stable bias
  - Just enough data
  - Adaptation of changes
  - Sequential tests
  - Data over time

**Research**
- Discover New Knowledge
- **Methods**
  - Test blinded
  - Eliminate bias
  - Just in case
  - Fixed hypothesis
  - One large test
  - Often pre/post data
Team meeting: what to watch for

- Tools of QI project
- Productive conflict (we WANT disagreement)
- Clear Aim
- Meeting hygiene
- Active discussion of PDSA test completed
- Decisions based on data
- Excitement: This matters.

All I really need is to know that you believe.
If you **do PDSAs small and quick**, improvement measures likely will not see assignable/substantial change.

Once you **finish testing and implement** (standardize) a change, you should expect the numbers to go in the right direction.

**Examples**

- Max-packing visits to get Well-Child Visits
- Outreach calls to no-shows
- Cooking demos in group visits
The improvement project team from Visionary Clinic, school-based health center

Hunter aka “Anna”, MA

Erin, FNP, team lead

Larry, site manager

Tierra, front desk
Project Aim Statement

By April 1, 2017,
Visionary Clinic will improve care for all our patients by achieving efficient visit flow, with an average visit Cycle Time of 60 minutes or less.
## Meeting / Project: Efficient visits project

### Goal(s) of Meeting:
- Date: **April 21, 2016**
- Time: **2:30pm**
- Attendees: *Erin, Larry, Tierra, Erin*

### Agenda Table

<table>
<thead>
<tr>
<th>Topic</th>
<th>Goal</th>
<th>Facilitator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Review/add to agenda</td>
<td>Finalize agenda</td>
<td>Erin</td>
</tr>
<tr>
<td>2. Outstanding action items from last meeting (below)</td>
<td>Review &amp; follow-up</td>
<td>Erin</td>
</tr>
<tr>
<td>3. New Topics:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Agree on decisions, next steps, owner, and deadline</td>
<td>Finalize next steps/action items</td>
<td></td>
</tr>
</tbody>
</table>

### Action Items from last meeting

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>By When</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tierra and Erin</td>
<td>PDSA on agenda-setting</td>
<td>4/21</td>
<td></td>
</tr>
<tr>
<td>Erin</td>
<td>Latest Cycle Time data</td>
<td>4/21</td>
<td></td>
</tr>
</tbody>
</table>

### Action Items from today’s meeting

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>By When</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Meeting / Project: Efficient visits project
Goal(s) of Meeting:
Date: April 21, 2016
Time: 2:30pm
Attendees: Erin, Larry, Tierra, Erin

<table>
<thead>
<tr>
<th>Topic</th>
<th>Goal</th>
<th>Facilitator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Review/add to agenda</td>
<td>Finalize agenda</td>
<td>Erin</td>
</tr>
<tr>
<td>2. Outstanding action items from last meeting (below)</td>
<td>Review &amp; follow-up</td>
<td>Erin</td>
</tr>
<tr>
<td>3. New Topics: Review cycle time data</td>
<td></td>
<td>Erin</td>
</tr>
<tr>
<td>4. Progress report to all-staff meeting</td>
<td></td>
<td>Larry</td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Agree on decisions, next steps, owner, and deadline</td>
<td>Finalize next steps/action items</td>
<td></td>
</tr>
</tbody>
</table>

Action Items from last meeting

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>By When</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tierra and Erin</td>
<td>PDSA on agenda-setting</td>
<td>4/21</td>
<td>“Do” completed</td>
</tr>
<tr>
<td>Erin</td>
<td>Latest Cycle Time data</td>
<td>4/21</td>
<td>Run chart ready for today</td>
</tr>
</tbody>
</table>

Action Items from today’s meeting

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>By When</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tierra and Erin</td>
<td>PDSA #2 on agenda-setting, with script for Tierra.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Larry</td>
<td>Will work with Tierra and Erin to share PDSA and run chart as progress report</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Plan-Do-Study-Act (rapid-cycle experiment) Worksheet

Date: 4/19/16 (Tues)
Lead person for this PDSA: Tierra, with Erin

Objective for this PDSA Cycle
(from our 4/14 meeting) Learn whether an agenda-setting form given at check-in will help patient and provider have organized and efficient (quick) visit.

What question(s) do we want to answer on this PDSA cycle?
Is the patient ok with taking this form in waiting area? Does Tierra have time to explain? Will patient fill it out? Will it help Erin organize the visit? Will it save time in the visit?

Plan
Plan to answer questions: Who, What, When, Where
Who: Tierra, Erin, first patient on Tuesday morning
What: Tierra gives agenda-setting form, patient fills it out while waiting for visit to start
When: Tuesday morning
Where: Waiting area, exam room
Plan for collection of data to answer your questions: Erin will bring the form used to the team meeting. Other info sources are patient comments solicited by Erin as visit ends, Erin and Tierra’s comments, and cycle time for this visit.
Predictions (for questions above based on plan): Agenda-setting will be helpful to organize visit, we do not all agree that it will save time.

Do
Carry out the change or test; Collect info on how it went. Begin analysis.
Tierra completed the test with Karla on Tuesday morning at 8:30 visit. Karla was confused about the form, didn’t know what “agenda” meant. Tierra explained but was interrupted by the phone twice, while Erin was waiting to call patient back to the exam room.

Study
Compare the data to your predictions and summarize the learning.
What question(s) do we want to answer on this PDSA cycle?

Is the patient ok with taking this form in waiting area? Does Tierra have time to explain? Will patient fill it out? Will it help Erin organize the visit? Will it save time in the visit?

**Plan**

Plan to answer questions: Who, What, When, Where

Who: **Tierra, Erin, first patient on Tuesday morning**

What: **Tierra gives agenda-setting form, patient fills it out while waiting for visit to start**

When: **Tuesday morning**

Where: **Waiting area, exam room**

Plan for collection of data to answer your questions: **Erin will bring the form used to the team meeting. Other info sources are patient comments solicited by Erin as visit ends, Erin and Tierra’s comments, and cycle time for this visit.**

Predictions (for questions above based on plan): **Agenda-setting will be helpful to organize visit, we do not all agree that it will save time.**

**Do**

Carry out the change or test; Collect info on how it went. Begin analysis.

**Tierra completed the test with Karla on Tuesday morning at 8:30 visit. Karla was confused about the form, didn’t know what “agenda” meant. Tierra explained but was interrupted by the phone twice, while Erin was waiting to call patient back to the exam room.**

**Study**

Compare the data to your predictions and summarize the learning.

**Erin liked it, Tierra didn’t because she felt like she was only confusing the patient and causing delays. Patient said she liked being able to say what she wanted to talk about, but was confused. Did not have any impact on this visit’s cycle time, was 45 minutes and first visit of day are often 45 minutes (no back-log yet of visits and phone calls).**

**Act**

Which of three options for next step?

- **ADOPT?** Finished testing, ready to implement.
- **ADAPT?** Test again, with a slight change, or with other people, different conditions.
- **ABANDON?** Team decided this change won’t work; no further testing needed.
Appointment Cycle Time
(excludes physicals)

Each dot = 1 week, dating back to November 2015

- Appointment Cycle Time
- Median
- Goal

Vitals in room
MA scribes for preventive care steps
Meeting / Project: Efficient visits project

Goal(s) of Meeting:
Date: April 21, 2016
Time: 2:30pm
Attendees: Anna, Larry, Tierra, Erin

<table>
<thead>
<tr>
<th>Topic</th>
<th>Goal</th>
<th>Facilitator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Review/add to agenda</td>
<td>Finalize agenda</td>
<td>Anna</td>
</tr>
<tr>
<td>2. Outstanding action items from last meeting</td>
<td>Review &amp; follow-up</td>
<td>Anna</td>
</tr>
<tr>
<td>3. New Topics: Review cycle time data</td>
<td></td>
<td>Anna</td>
</tr>
<tr>
<td>4. Progress report to all-staff meeting</td>
<td></td>
<td>Larry</td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Agree on decisions, next steps, owner, and deadline</td>
<td>Finalize next steps/action items</td>
<td></td>
</tr>
</tbody>
</table>

Action Items from last meeting

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>By When</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tierra and Anna</td>
<td>PDSA on agenda-setting</td>
<td>4/21</td>
<td>“Do” completed</td>
</tr>
<tr>
<td>Anna</td>
<td>Latest Cycle Time data</td>
<td>4/21</td>
<td>Run chart ready for today</td>
</tr>
</tbody>
</table>

Action Items from today’s meeting

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>By When</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tierra and Anna</td>
<td>PDSA #2 on agenda-setting, with script for Tierra.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Larry</td>
<td>Will work with Tierra and Anna to share PDSA and run chart as progress report</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What are we trying to accomplish?

How will we know that a change is an improvement?

What changes can we make that will result in improvement?

Model for Improvement

AIM
MEASURES
CHANGES
RAPID TEST
OF CHANGES

From Associates in Process Improvement.
Quality Improvement 101

Part 1
Using Small PDSA Experiments to Test and Implement Changes, Without Driving Everybody Nuts
Completed, recording available

Part 2
Improving Team Performance through Processes
Completed, recording available

Part 3
Moving toward Better Patient Care with QI Team Meetings
You are here, recording available soon

More info: www.ihi.org “How to Improve” and IHI Open School
Questions for Hunter: hunter@signalkey.com