Developing Change Ideas:
It starts with a SMALL "PLAN"

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Think about a Change . . .
Selecting and Prioritizing Change Ideas

- Which idea would most address . . .
  - Clinical quality?
  - Waste reduction?
  - Finances?
  - Patient/family care experience?

- Which idea is . . .
  - Easy to try?
  - Important to staff?
  - Important to leadership?
  - Most likely to get attention if it’s successful?
Multi-voting (a.k.a. “Dot” Voting)

Aim Statement
We will improve asthma management by increasing the ratio of inhaled controller medications to inhaled rescue medications from 59% to 75% by January 1, 2015

Primary Drivers (Problems with the System)
- Documentation
- Treatment
- Patient Engagement

Secondary Drivers (Areas for Improvement/Change Ideas)
- Incorrect classification in EMR
- No diagnosis of asthma in problem list
- No evidence of asthma in progress notes
- Inhaler medication not prescribed
- Provider not following standards
- No f/up or case management provided
- Does not know how to properly use inhaler
- Fails to pick up inhaler
- Fails to keep appts.
## Asthma Example

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<td>Pt. keeps scheduled appt.</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>3</td>
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<td>13</td>
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<tr>
<td>Correct classification in EMR</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>3</td>
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<td>2</td>
<td>13</td>
</tr>
<tr>
<td>Pt. F/up with case manager</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>12</td>
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**Instructions:**
1. Score each item 1-3 (1 is lowest, 3 is highest)
2. Total scores across all categories
3. What is your #1 highest ranked small bone to test?
Multi-voting (a.k.a. “Dot” Voting)

Aim Statement

PATIENT PARTNERSHIP FOR PHASE

Primary Drivers (Problems with the System)

Direct Care

Secondary Drivers (Areas for Improvement/Change Ideas)

Change Idea #1
Change Idea #2
Change Idea #3
Change Idea #4

Clinic and Systems

Change Idea #1
Change Idea #2
Change Idea #3
Change Idea #4
Model for Improvement

- 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?

Act Plan

Study Do

Testing Changes

From Associates in Process Improvement
Act
• What changes are to be made?
  ▪ Adopt, Adapt, Abandon?
• Next cycle?

Plan
• Objective
• Questions and predictions (why?)
• Plan to carry out the cycle (who, what, where, when?)

Study
• Complete analysis
• Compare data to predictions
• Summarize learning

Do
• Carry out the plan
• Document problems and unexpected observations
• Begin analysis of the data
Why Do Small Tests of Change?

- Provides an opportunity to learn from a temporary situation
- Increases degree of belief that a change will result in improvement
- Provides information regarding the limitations of a change
- Addresses unexpected consequences EARLY
- Facilitates gaining buy-in
- Prevents implementation of the WRONG process
Testing Changes

- Small scale tests = BIG changes
- Experimentation is required
- Small, rapid tests of change → PDSA cycle
PDSA - Plan

- Record details of the test
  - Use a PDSA Template
  - Record the details
    - Who, what, where, when

- Formulate predictions

- Determine data collection needs for test evaluation
Objective and Questions to Answer

Objective for PDSA cycle:
- To improve Diabetes Management and appointment efficiency by having MA conduct foot exam using filament

What questions do we want this test to answer with this PDSA cycle?
- How will this test:
  - Impact the % of exams being completed?
  - Impact the cycle time of appointment?
  - Impact job satisfaction for both MA and provider?
TEST = Diabetic Foot Exam
Steps to Execute “PLAN”

During the week of 6/11/2019, MA Sally, of Care Team B, will:

- Receive training on filament foot exam
- Identify 4 diabetic patients scheduled with Dr. Zee for next week
- Conduct foot exam using filament for identified patients
- Meet with Dr. Zee at the end of this test cycle to review, analyze and add comments to data collection form
TEST = Diabetic Foot Exam
Data Collection Plan

- Was foot exam completed? (Y/N)
  - If not, why not?
- Did foot exam impact efficiency of appointment:
  - Time?
  - Treatment provided?
- Did MA and Provider feel satisfied with process?
## Translating Data Collection to a Form

<table>
<thead>
<tr>
<th>Identified Diabetic Patient Needing Foot Exam</th>
<th>Was Foot Exam Completed by MA? [If no, provide comments regarding why]</th>
<th>Did Foot Exam Impact Length of Scheduled Appt.? (Y/N)</th>
<th>If Yes, what was the difference in time</th>
<th>Satisfaction Rating (😊/😉)</th>
<th>Dr. Zee</th>
<th>MA Sally</th>
<th>Comments</th>
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</table>
TEST = Diabetic Foot Exam
Making Predictions

- Appointments may run longer until Sally gets comfortable with filament test process and adding it into her work day
- Four out of 4 patients identified will receive the foot exam
- Dr. Zee and Sally may not be satisfied with the process initially
- Dr. Zee may feel tentative to allow the MA to conduct the test in the beginning
- Sally will be both nervous and excited to take on this responsibility
- Both will be concerned about the cycle time
PDSA - Do

- Carry out the plan
- Document problems and observations
- Collect data and begin analysis
PDSA - Study

- Complete data analysis
  - Leave time for reflection about the test
    - What is your “gut” reaction?
- Compare data to predictions
  - What happened?
    - Did you get expected results?
    - Did anything unexpected happen?
- Summarize what was learned
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<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>No</td>
<td>Yes</td>
<td>15</td>
<td>😞</td>
<td>😞</td>
<td></td>
<td>Filaments had not been stocked in exam room; Dr. Zee prepared while Sally found filaments and Dr. Zee performed exam to save time</td>
</tr>
<tr>
<td>2</td>
<td>No</td>
<td>No</td>
<td>0</td>
<td>😊</td>
<td>😊</td>
<td></td>
<td>Pt. was experiencing chest pain, which was the focus of the appt.</td>
</tr>
<tr>
<td>3</td>
<td>Yes</td>
<td>Yes</td>
<td>5</td>
<td>😊</td>
<td>😊</td>
<td></td>
<td>Pt. needed some additional instruction/ education</td>
</tr>
<tr>
<td>4</td>
<td>Yes</td>
<td>Yes</td>
<td>0</td>
<td>😊</td>
<td>😊</td>
<td></td>
<td>MA felt well-prepared and Dr. Zee appreciated additional time that he could spend with patient</td>
</tr>
</tbody>
</table>
PDSA - Act

- What will do next?
  - Adopt
  - Adapt
  - Abandon

- Plan the next cycle or test iteration
  - Refine changes
  - Try it on a larger scale
A quote from IDEO

“Fail often to succeed sooner.”
Repeated Use of PDSA Cycle

Hunches
Theories Ideas

Very Small Scale Test

Follow-up Tests

Wide-Scale Tests of Change

Implementation of Change

Changes That Result in Improvement

DATA

Repeated Use of PDSA Cycle

Very Small Scale Test

Follow-up Tests

Wide-Scale Tests of Change

Implementation of Change

Changes That Result in Improvement

DATA
Test Iterations

- Very Small-scale Tests
- Follow-up Tests
- Wide-scale Tests
- Implementation
**Small Scale** Test Iterations

MA Complete Foot Exam

**Hunches, theories, predictions, ideas**

| #1 | MA identify 4 diabetic patients and conduct foot exam |
| #2 | Stock all exam rooms with filaments and repeat test #1 |
| #3 | Repeat Test #2 but complete foot exam BEFORE the exam |
| #4 | Repeat #3 and add laminated, foot exam pt. ed. tool that will provide step-by-step |
| #5 | Repeat #4 and provide mirror for patient to observe exam |
| #6 | Repeat #5 and ramp up to 10 patients |
| #7 | Repeat #6 and ramp up to two MAs |

**High-Degree of Belief**

1. F/up Tests
2. Wide-scale tests

**DATA**
PDSA Cycle Considerations

- Conducting simultaneous tests can be
  - Keep testing population separate
- Bundling tests can be done
  - If your prediction is that BOTH elements are necessary for improvement
“Drop 2 Levels”

PDSA Tip #1 – Don Berwick Scale Down

- Years
- Quarters
- Months
- Weeks
- Days
- Hours
- Minutes
- 25 patients
How Would You Size Down the Tests?

- Huddles for a week
- Pre-visit planning for all patients with chronic illness
- Standardizing exam rooms
- Creating distributed multi-professional work stations
PDSA Tip #2: “Oneness”
Repeated Use of PDSA Cycle

- Hunches, Theories, Ideas
- Very Small Scale Test
- Follow-up Tests
- Wide-Scale Tests of Change
- Implementation of Change
- Changes That Result in Improvement

DATA
Small Scale Test Iterations
Patient Outreach

Hunches, theories, predictions, ideas

DATA

High-Degree of Belief
1. F/up Tests
2. Wide-scale tests

#1 - Test robo-call reminders 3 days before scheduled appt. for 5 patients next week

#2 - Repeat Test #1 + Live call 1-day prior to appt.

#3 - Repeat Test #2 + use script w/3 key messages for patient

#4 – Repeat Test 3 for 10 patients
Small Scale Test Iterations: Shared Decision Making Tool

1. F/up Tests
2. Wide-scale tests

#1 – Provide 2 patients with **Shared Decision Making Tool A** during registration and invite them to fill in blanks for 2 things they want to discuss with the provider; conduct exit interview to ask the patient and provider about experience

#2 – Repeat Test #1 AND have MA review the items for discussion with the patient and mention them to provider

#3 – Repeat Test #2 but CHANGE to **Shared Decision Making Tool B**

#4 – Repeat both test #1 and #3 with an additional 10 patients to determine best tool to use (patient/provider/MA feedback)

#5 – Repeat both test #2 and #3 with an additional 10 patients to determine best tool to use (patient/provider/MA feedback)
PDSA Cycle must include

- A question
- A prediction
- The test or observation was planned - include a plan for collecting data
- The plan was attempted - do the plan
- Time was set aside to analyze the data and study the results compared to prediction
- Action was rationally based on what was learned
A Quote from Don Berwick

“What can we do next Tuesday, without harming a hair on the head of a patient?”
Develop A PDSA to Implement “Next Tuesday”

- Review the prioritized ideas on your Storyboard
  - Re-prioritize, if necessary
- Select one idea that you can try “next Tuesday”
- Develop the “PLAN” portion of the PDSA worksheet
- Identify possible “next” test iterations
  - What other questions do you have?