Developing Change Ideas:

It starts with a *SMALL* "PLAN"

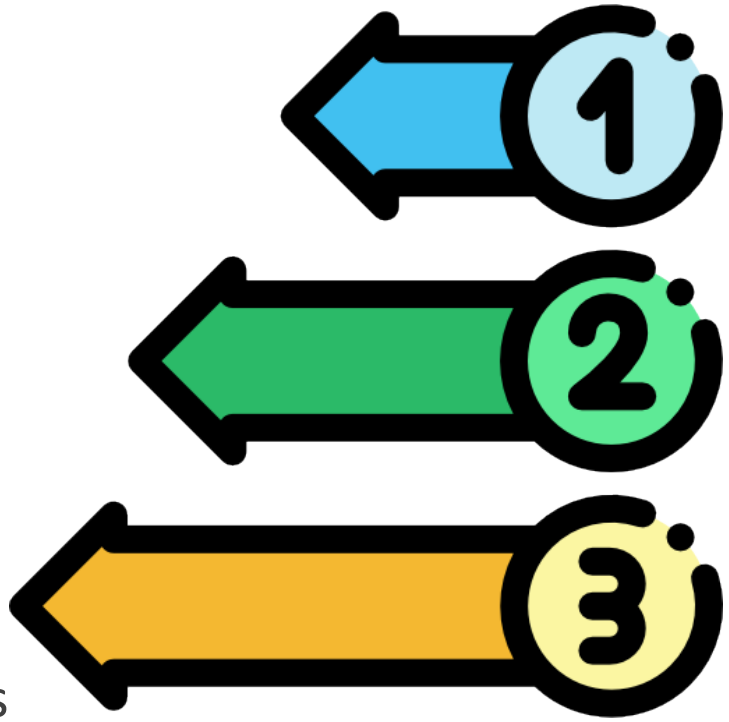
DENISE ARMSTORFF

JUNE 11, 2019

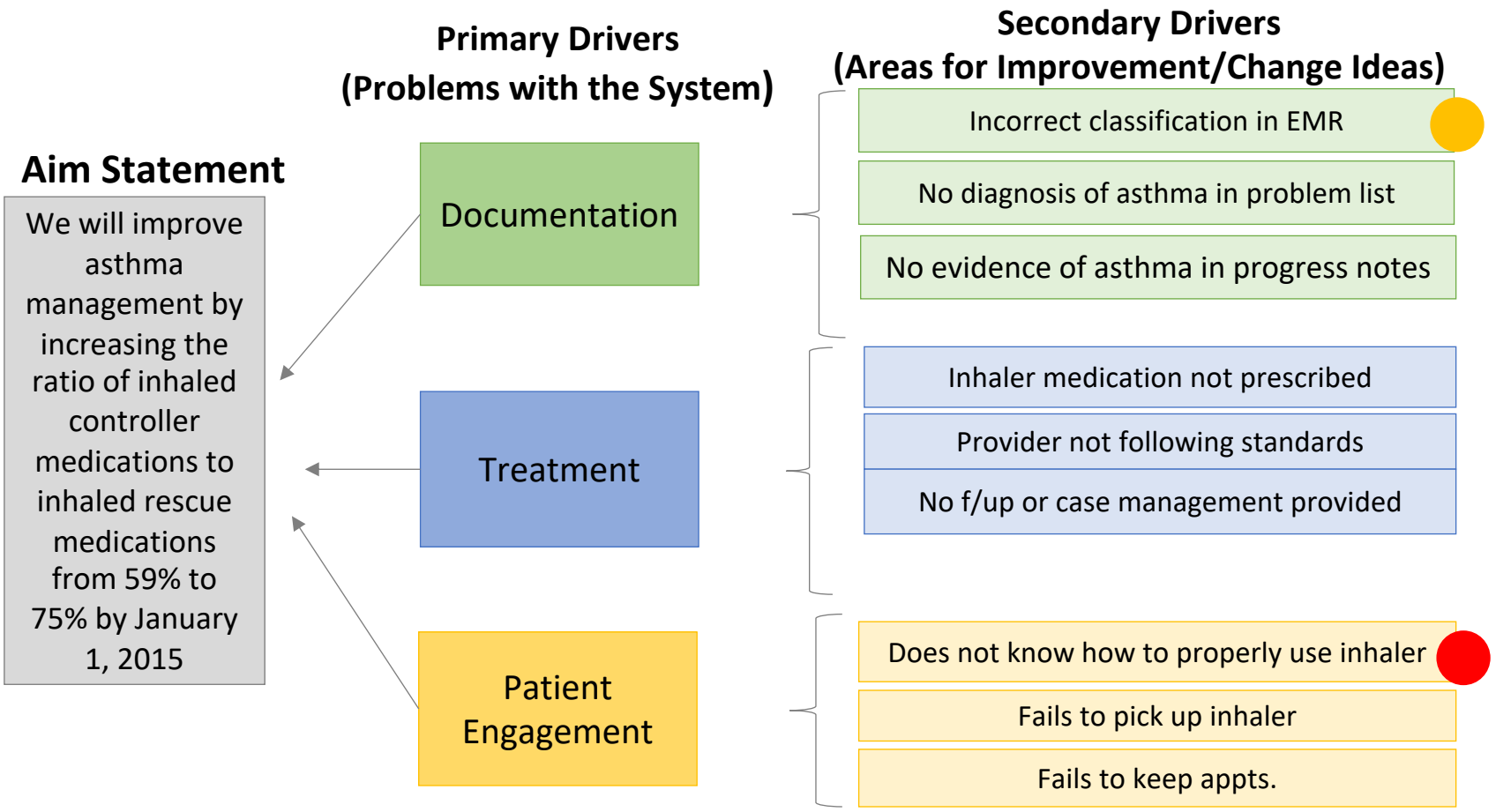
Think about a Change . . .

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)



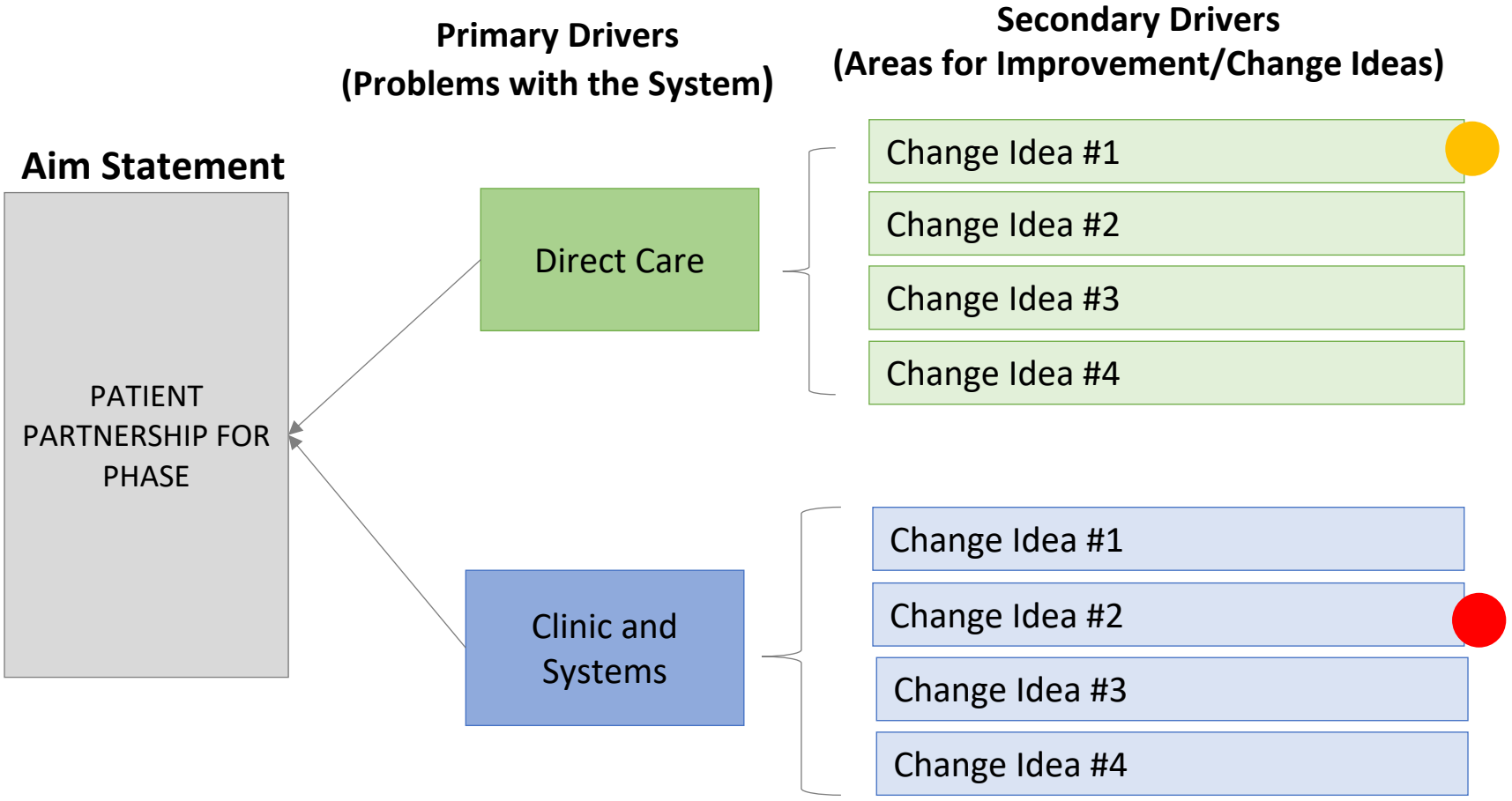
Asthma Example

Issue	Clinical Quality Improved? - is impact on quality of care positive?	Waste reduced with improved financial impact? - improved financial performance?	Patient Care Experience Improved? - Pt satisfaction improved?	Ease of Implementa-tion?	Leadership Support	Frontline Engage-ment	Overall SCORE TOTAL
Pt. keeps scheduled appt.	3	2	3	1	3	1	13
Correct classification in EMR	3	1	1	3	3	2	13
Pt. F/up with case manager	3	1	3	1	2	2	12

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)

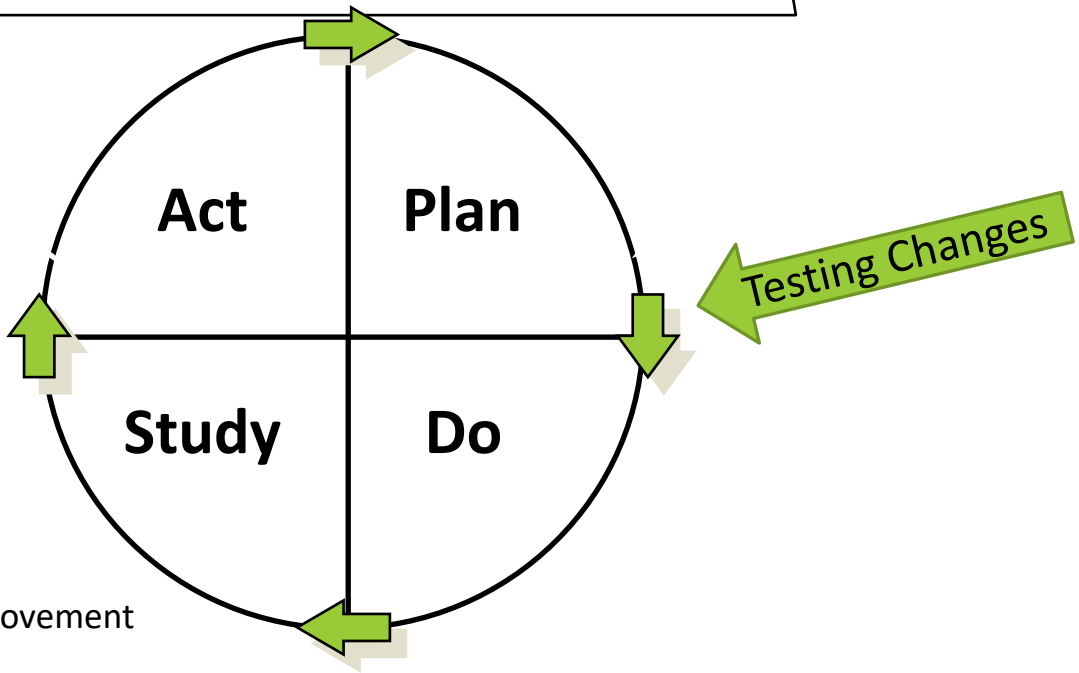


Model for Improvement

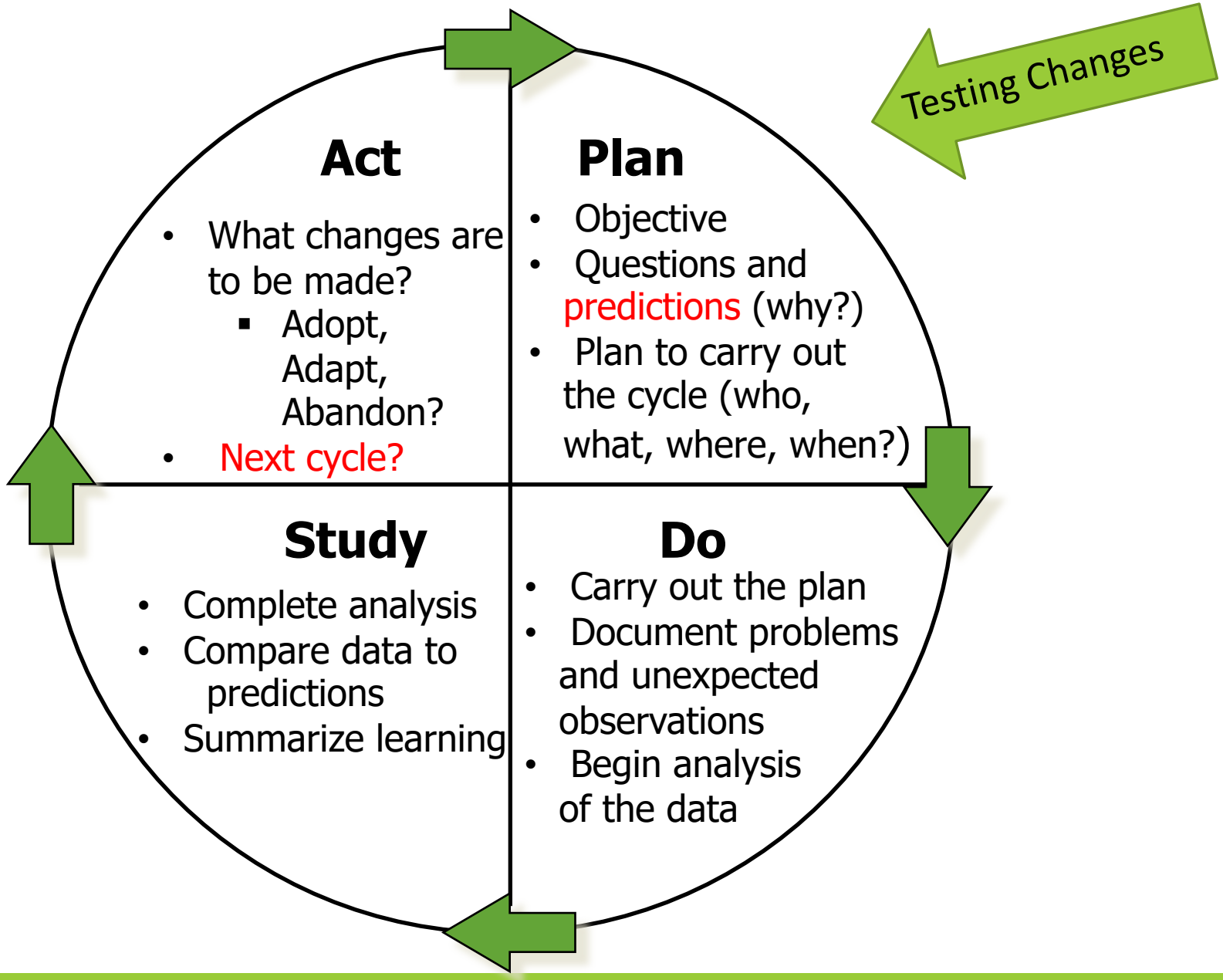
What are we trying to accomplish?

How will we know that a change is an improvement?

What changes can we make that will result in improvement?



From Associates in Process Improvement

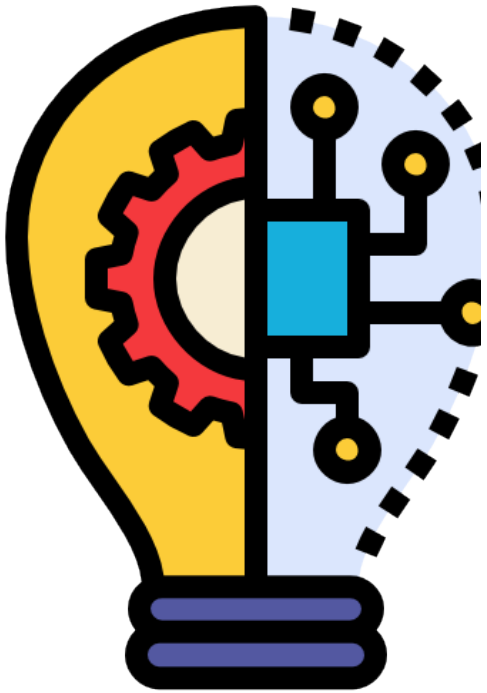

Testing Changes
Act
What changes are to be made?
Adopt, Adapt, Abandon?
Next cycle?
Plan
Objective
Questions and predictions (why?)
Plan to carry out the cycle (who, what, where, when?)
Study
Complete analysis
Compare data to predictions
Summarize learning
Do
Carry out the plan
Document problems and unexpected observations
Begin analysis of the data

Why Do Small Tests of Change?

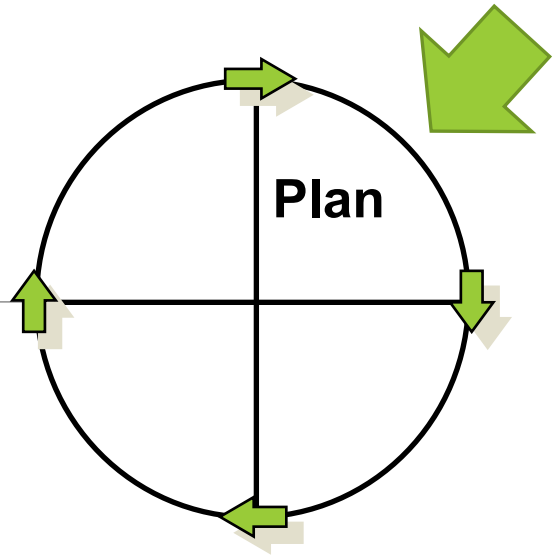
- Provides an opportunity to learn from a temporary situation
- Increases degree of belief that a change will result in improvement
- Provides information regarding the limitations of a change
- Addresses unexpected consequences EARLY
- Facilitates gaining buy-in
- Prevents implementation of the WRONG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

TEST = Diabetic Foot Exam 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 be 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

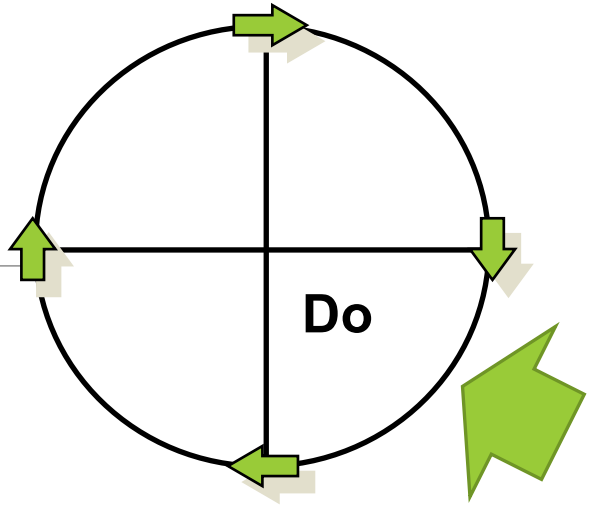
Identified Diabetic Patient Needing Foot Exam	Was Foot Exam Completed by MA? [If no, provide comments regarding why]	Did Foot Exam Impact Length of Scheduled Appt.? (Y/N)	If Yes, what was the difference in time	Satisfaction Rating (☺/☹)		Comments
				Dr. Zee	MA Sally	

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

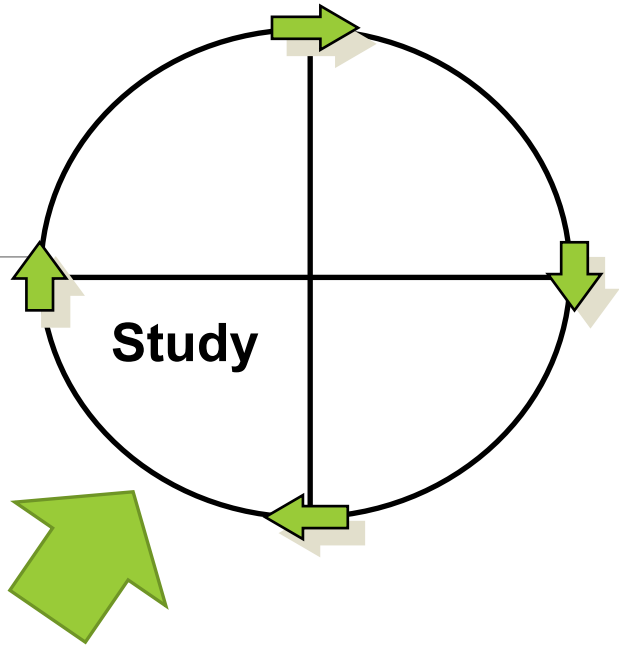
- Carry out the plan
- Document problems and observations
- Collect data and begin analysis



17

PDSA - Study

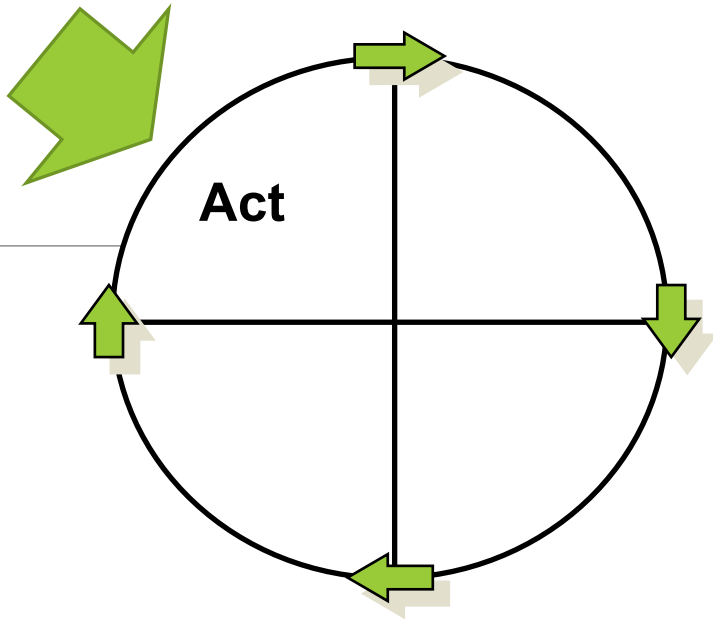
- Complete data analysis
  - Leave time for reflection about the test
    - What is your “gut” reaction?
- Compare data to predictions
  - What happened?
    - Did you get expected results?
    - Did anything unexpected happen?
- Summarize what was learned



18

Identified Diabetic Patient Needing Foot Exam	Was Foot Exam Completed by MA? [If no, provide comments regarding why]	Did Foot Exam Impact Length of Scheduled Appt.? (Y/N)	If Yes, what was the difference in time	Satisfaction Rating (☺/☹)		Comments
				Dr. Zee	MA Sally	
1	No	Yes	15	☹	☹	Filaments had not been stocked in exam room; Dr. Zee prepared while Sally found filaments and Dr. Zee performed exam to save time
2	No	No	0	☺	☺	Pt. was experiencing chest pain, which was the focus of the appt.
3	Yes	Yes	5	☺	☺	Pt. needed some additional instruction/ education
4	Yes	Yes	0	☺	☺	MA felt well-prepared and Dr. Zee appreciated additional time that he could spend with patient

PDSA - Act



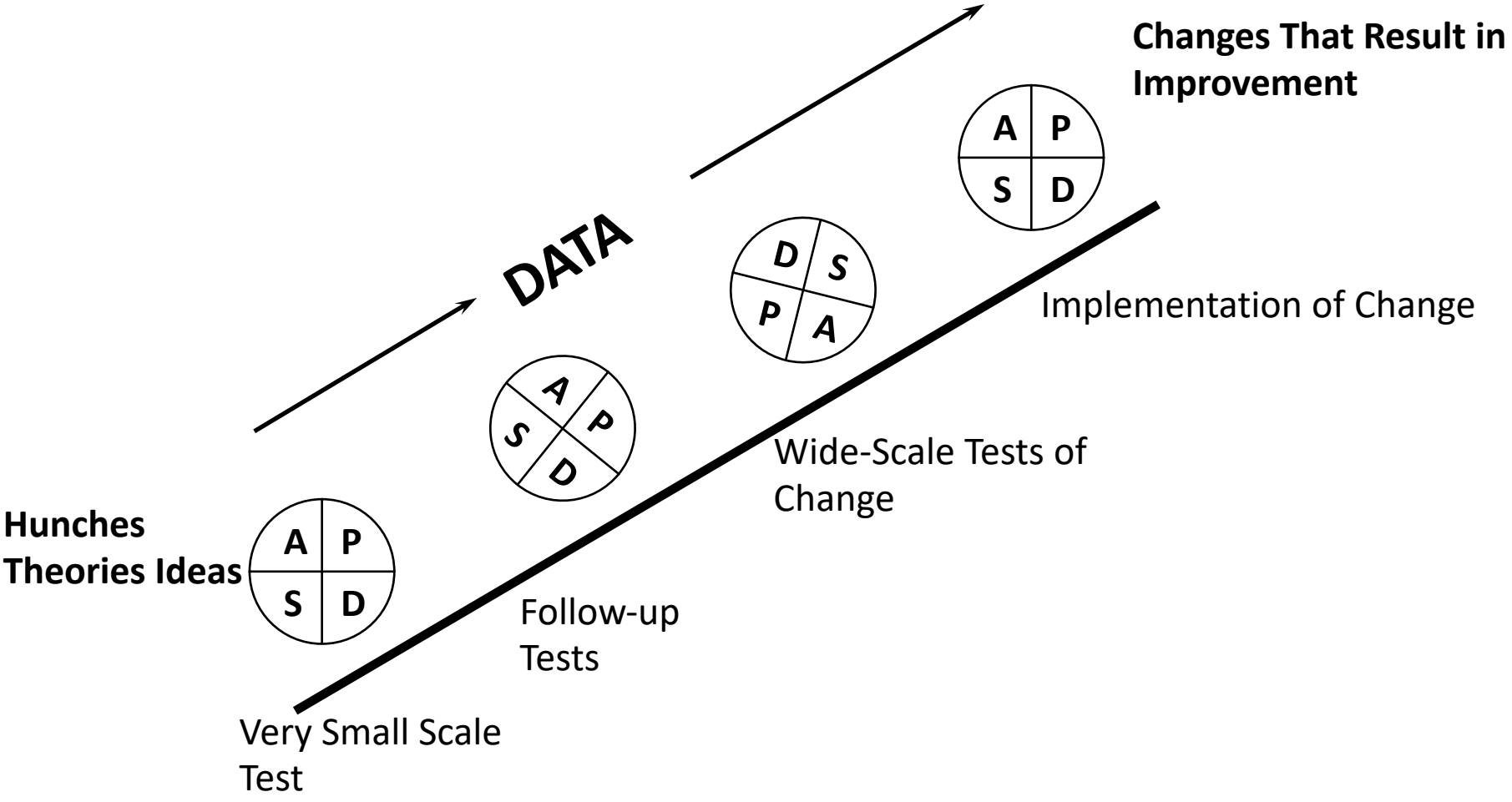
- What will do next?
  - Adopt
  - Adapt
  - Abandon
- Plan the next cycle or test iteration
  - Refine changes
  - Try it on a larger scale

A quote from IDEO

"Fail often to succeed sooner."

21

Repeated Use of PDSA Cycle



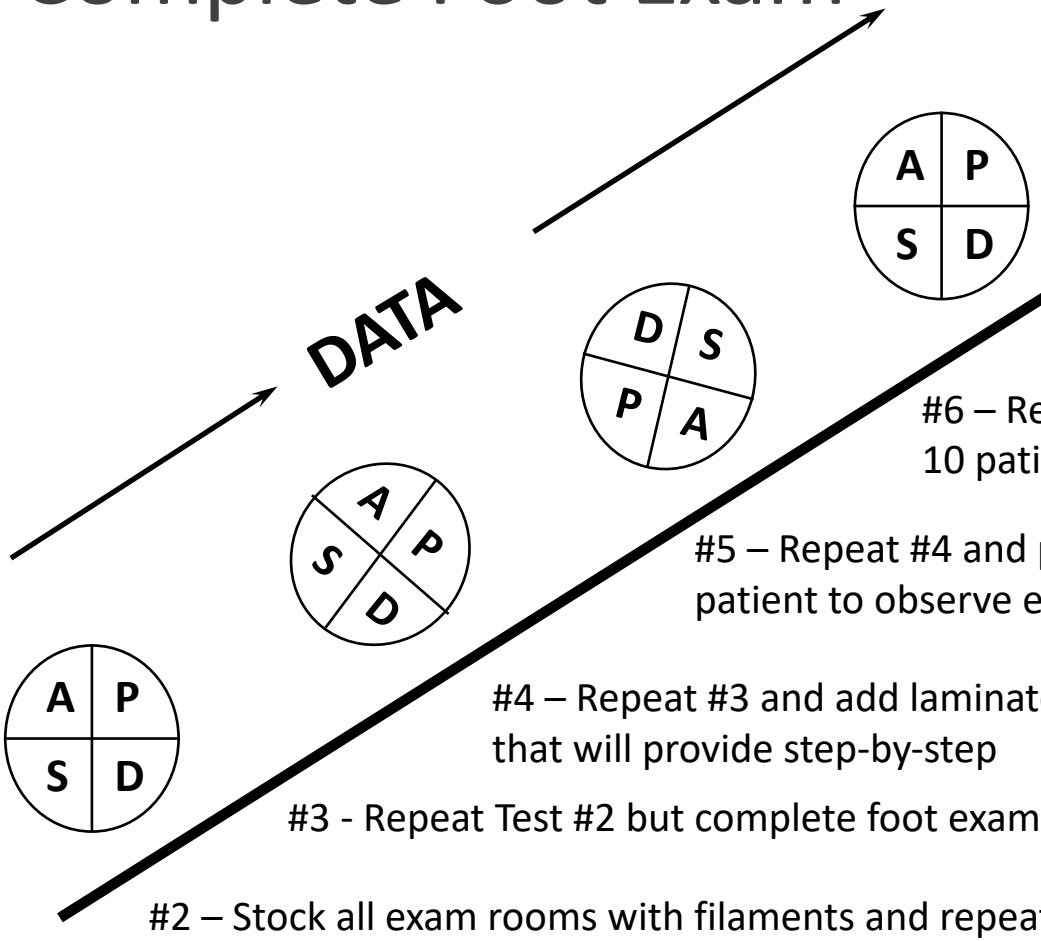
Test Iterations

- Very Small-scale Tests
- Follow-up Tests
- Wide-scale Tests
- Implementation

Small Scale Test Iterations
MA Complete Foot Exam

High-Degree of Belief

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



#7 – Repeat #6 and ramp up to two MAs

#6 – Repeat #5 and ramp up to 10 patients

#5 – Repeat #4 and provide mirror for patient to observe exam

#4 – Repeat #3 and add laminated, foot exam pt. ed. tool that will provide step-by-step

#3 - Repeat Test #2 but complete foot exam BEFORE the exam

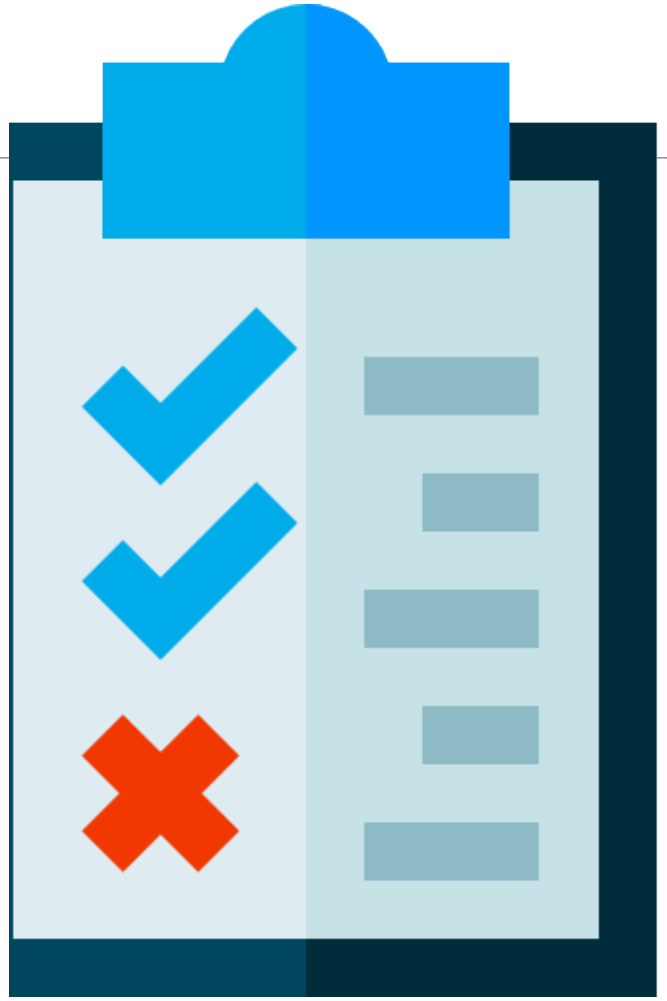
#2 – Stock all exam rooms with filaments and repeat test #1

#1 – MA identify 4 diabetic patients and conduct foot exam

Hunches, theories, predictions, ideas

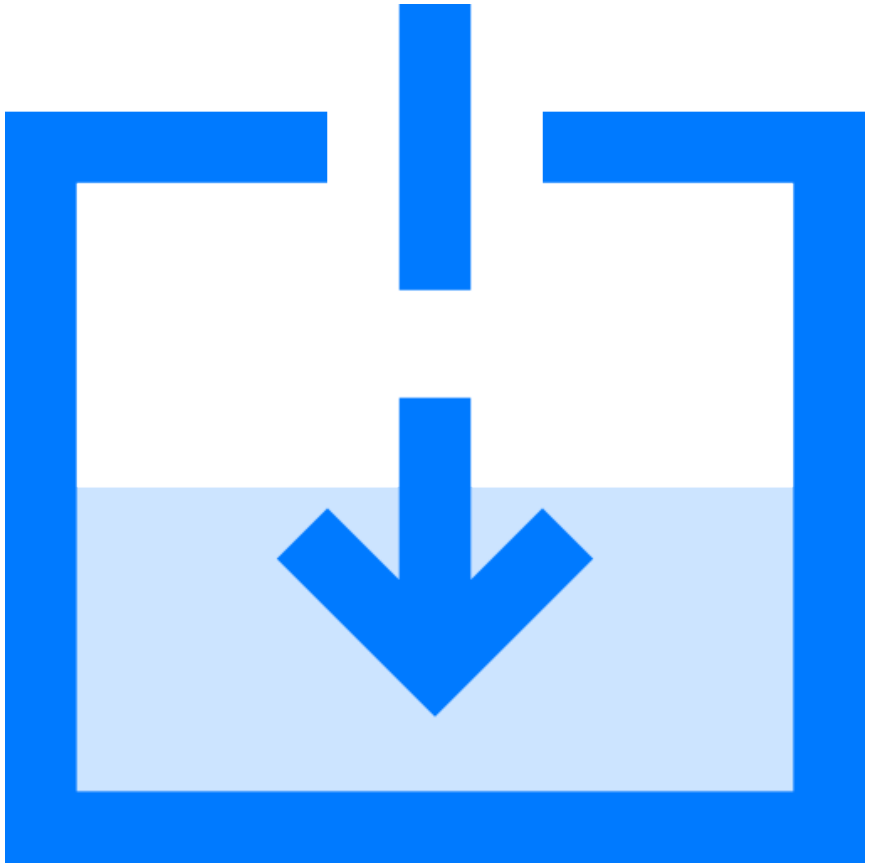
PDSA Cycle Considerations

- 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

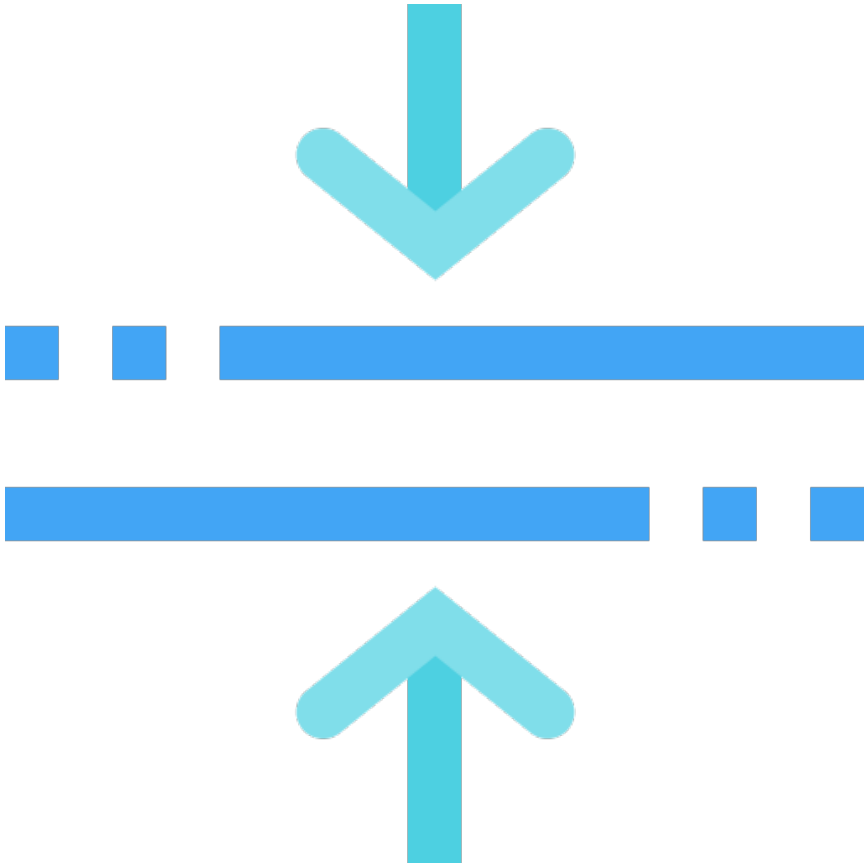


PDSA Tip #1 – Don Berwick Scale Down

“Drop 2 Levels”



- Years
- Quarters
- Months
- Weeks
- Days
- Hours
- Minutes
- 25 patients

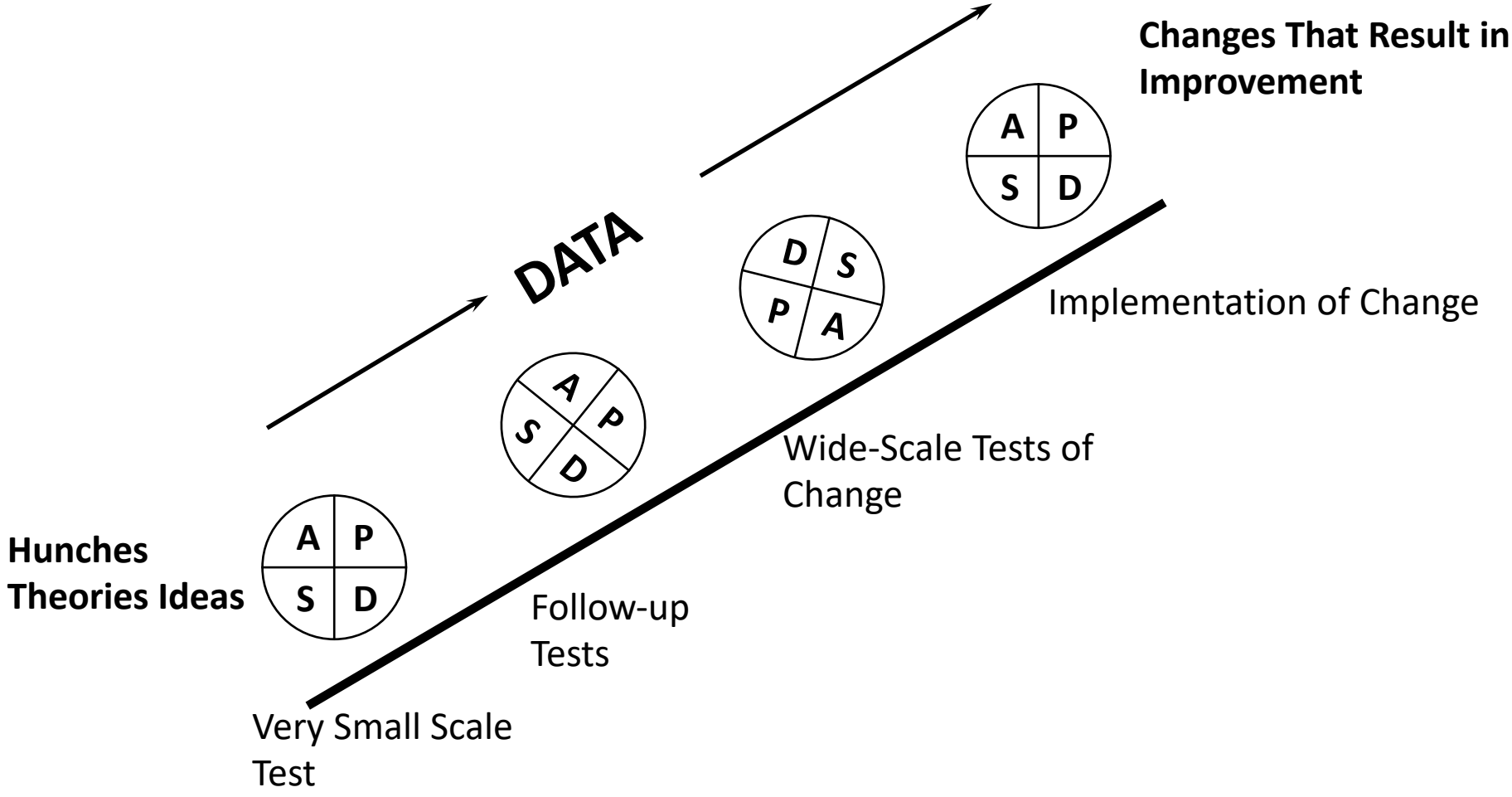


How Would You Size Down the Tests?

- 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”

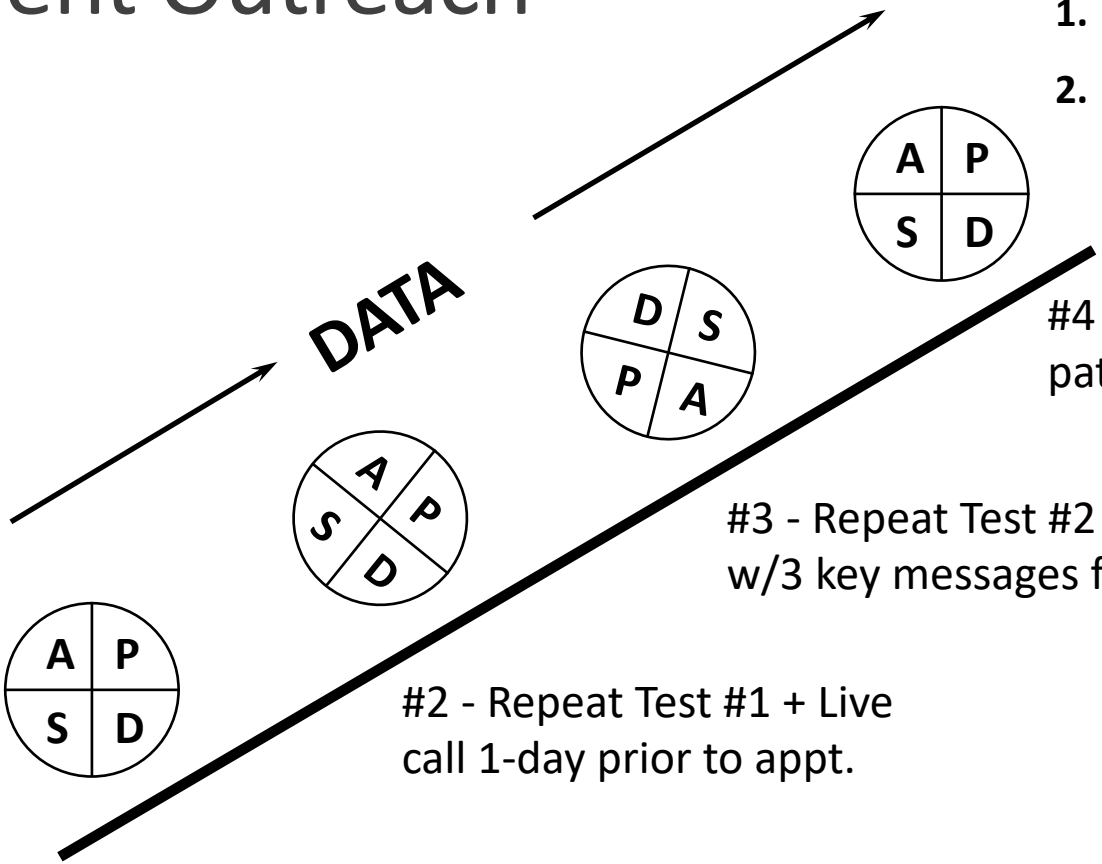
Repeated Use of PDSA Cycle



Small Scale Test Iterations Patient Outreach

High-Degree of Belief

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



#4 – Repeat Test 3 for 10 patients

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

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

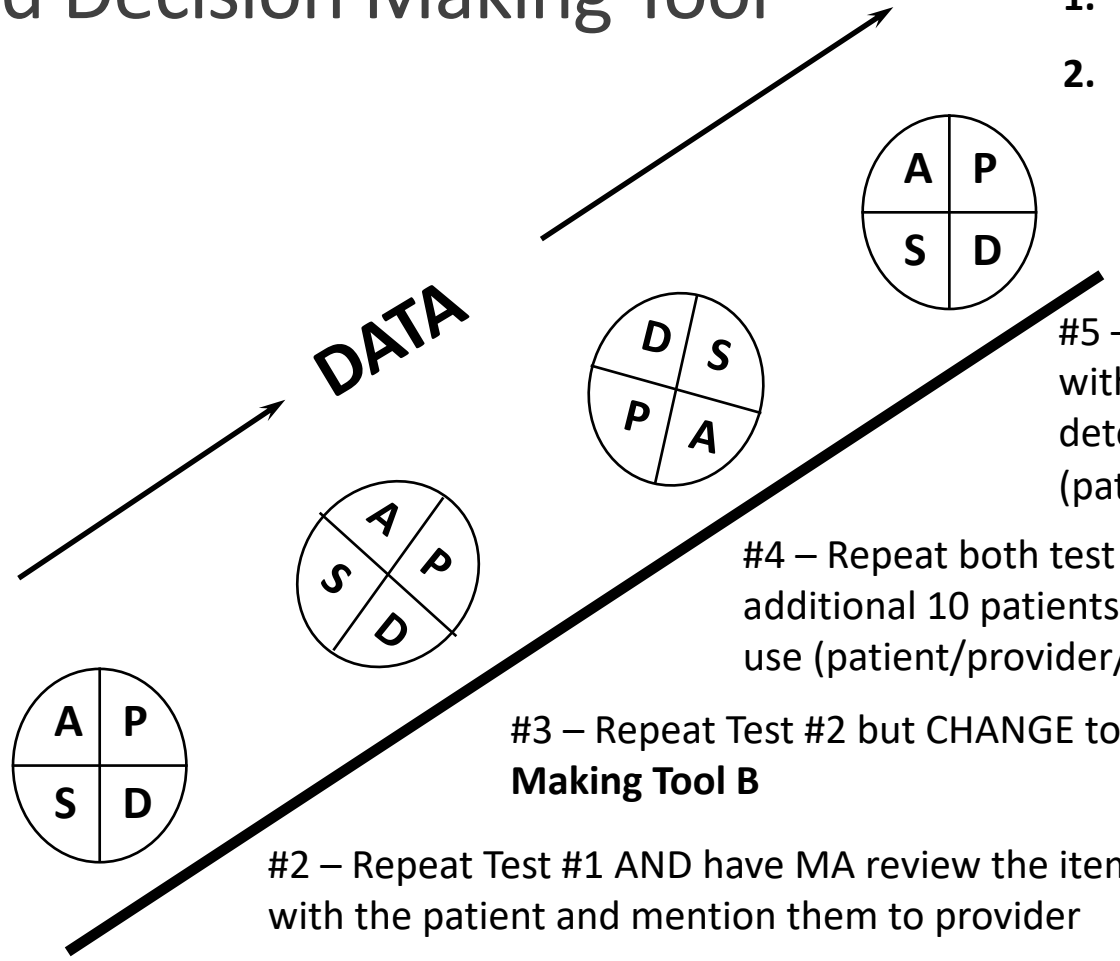
Hunches, theories, predictions, ideas

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

Small Scale Test Iterations: Shared Decision Making Tool

High-Degree of Belief

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



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

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

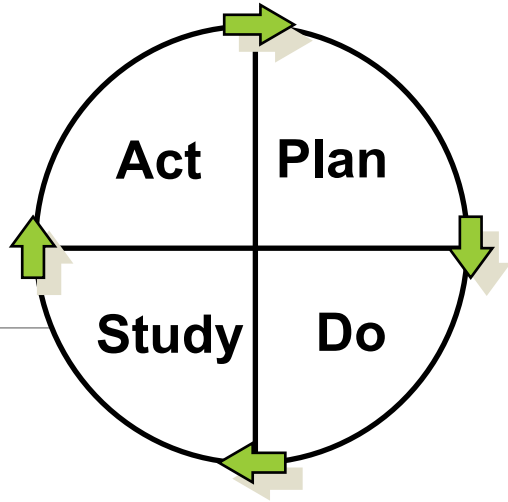
#3 – Repeat Test #2 but CHANGE to **Shared Decision Making Tool B**

Hunches, theories, predictions, ideas

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

#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

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?