



# TC3 Site Visit Debrief Call

Transforming Cardiovascular Care in Our Communities

September 12, 2019 | 1-2pm

# Roadmap

2019

April	May	June	July	Aug	Sep	Oct	Nov	Dec
Launch		Phase I: Define Measure Analyze				Action period: rapid testing		

In Person Learning Sessions & Site Visits

In- Person Mtg

Grantee Go-and-See Site Visits

In- Person Learning Session (Nov. 5))

Peer Learning Site Visit

Webinars and remote training

Kick Off Webinar

Site Visit Planning Call

Site Visit Debrief & Charter Development

Wireside Chat Clinical Webinar TBD

MI Training TBD

We are here!

Coaching

Clinic Building Block Self-Assessment & Data Reporting

BB

Grantee Calls with CCHE/CCI

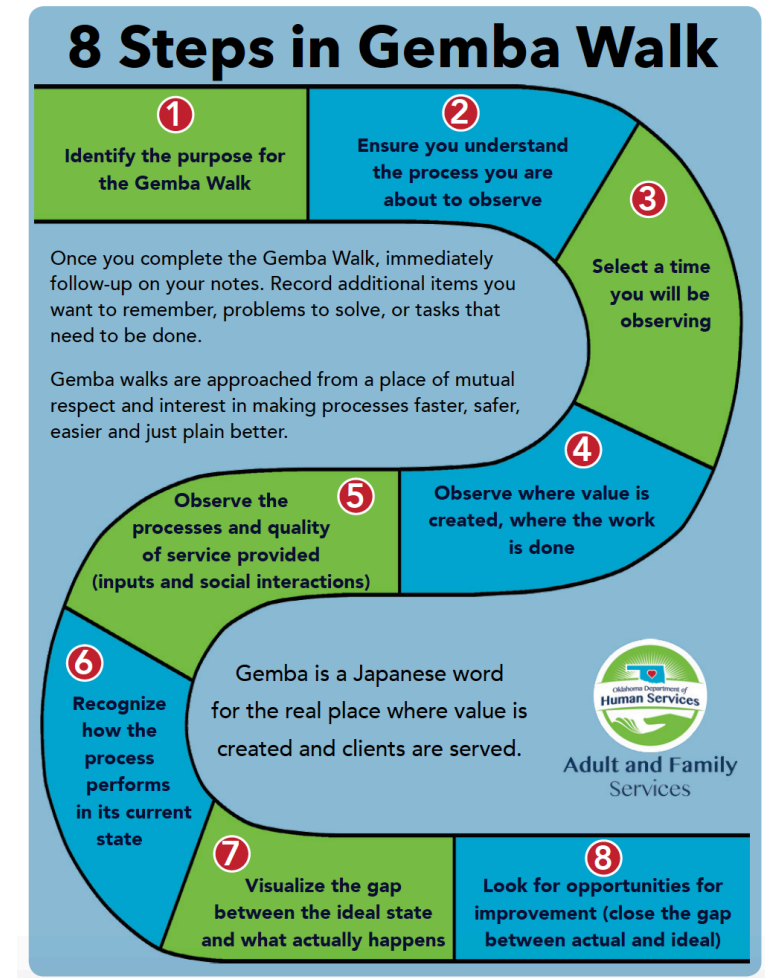
Intro Call

Data Call

Data Call

Virtual resources, newsletter, responsive assistance

# Why do site visits & shadowing...



# Site Visit Debrief Round Robin



Organization and what site(s) you have visited

What processes did you shadow?

What were your biggest takeaways and learnings from your site visit(s)?

What are your team's next steps?

# Key CCI Site Visit Learnings

- These site visits work best when the TC3 grantee team leads them. Sometimes the TA team's presence can make it hard for the grantee team to “own” the site visit.
- The more the teams shadowed, the more they learned about the current state.
- Having care team members participate in shadowing and in the debrief session is extremely valuable.

# Denise Armstorff

Master Coach

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## Developing a Charter

# Why a Charter?

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- A charter represents a document that describes a project, its rationale, its goals and its participants.
- The purpose of a charter aims at aligning the expectations of all the contributors so that their energy focuses on the project's priorities.
  - It establishes the foundation of the project





## Defining the Problem (Opportunity)

- When designing your problem statement, include the following:
  - A brief description of the problem and the metric used to describe the problem
  - Where the problem is occurring by process name and location
  - The time frame over which the problem has been occurring
  - The size or magnitude of the problem



# Developing an Aim Statement

- What are we trying to accomplish
- How good do you want to be *and* by when?
- Aim statements should be SMART:

- Specific
- Measurable
- ~~A~~chievable Ambitious
- Relevant
- Time-bound



# Characteristics of Strong Aims



## Technical

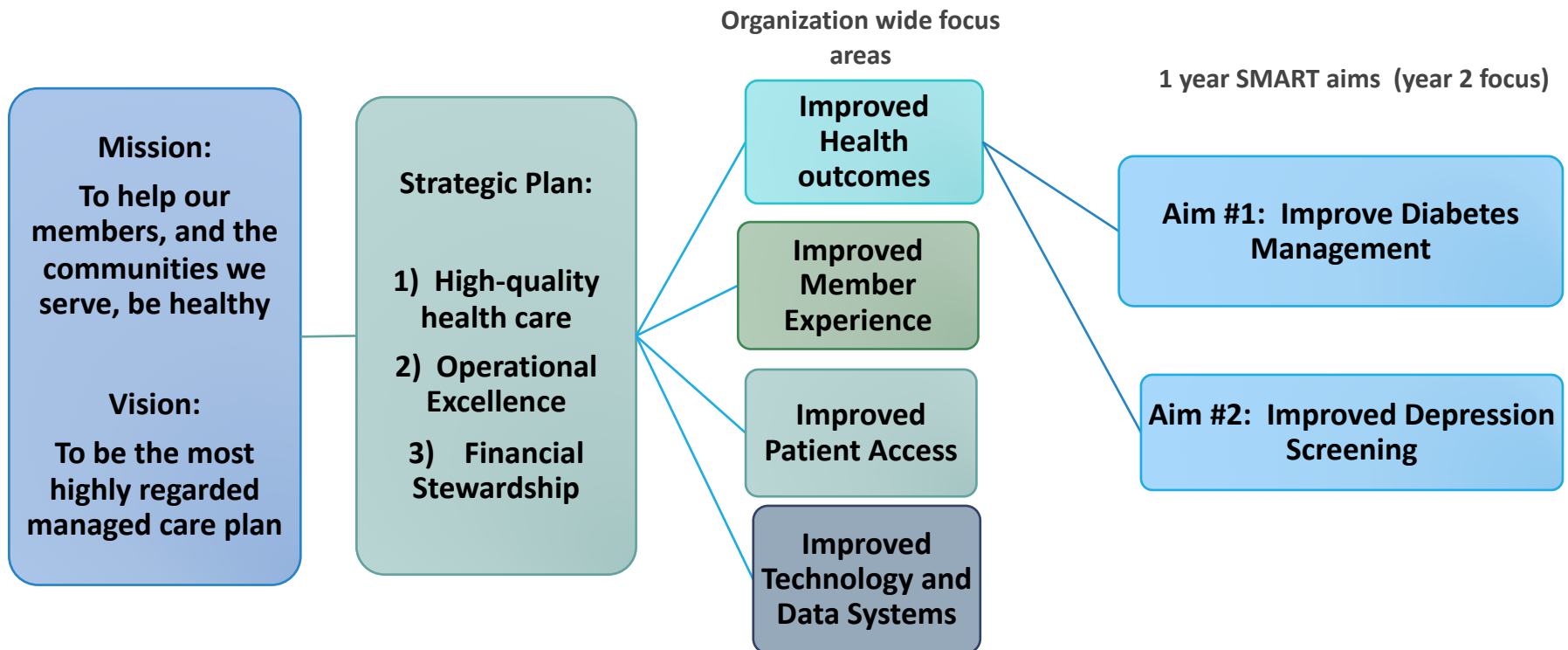
- Provides rationale/context for importance of project
- Sets a clear goal to focus the team
  - Helps prevent distractions and scope creep
- Defines patient population
- **Alignment with focus area in the org wide goals**



## Emotional

- Meaningful
- Compelling

# Aligning Improvement Work to Organizational Priorities

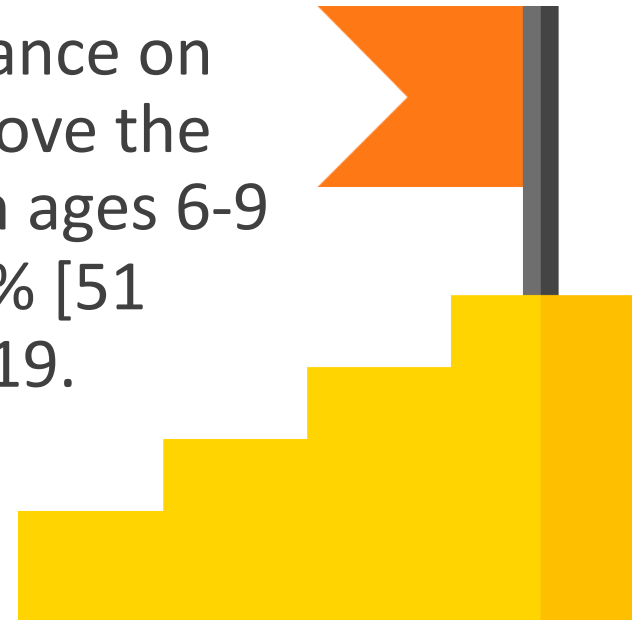


# Example: SMARTest Aim Statement

To improve organizational performance on UDS measures, ABC Clinic will improve the dental sealant rate for at-risk children ages 6-9 from 13.8% [21 children] to 33.8% [51 children] by December 31, 2019.



Best



# Change vs. Improvement

“All improvement requires change, but not every change is an improvement.”



*The Improvement Guide*, Langley, et al., Chapter 6, p. 109

# Developing Theories (Hypotheses) for Change



Enumerates why we think our proposed change will be good



Helps QI team articulate the basis of predictions that changes will result in an improvement

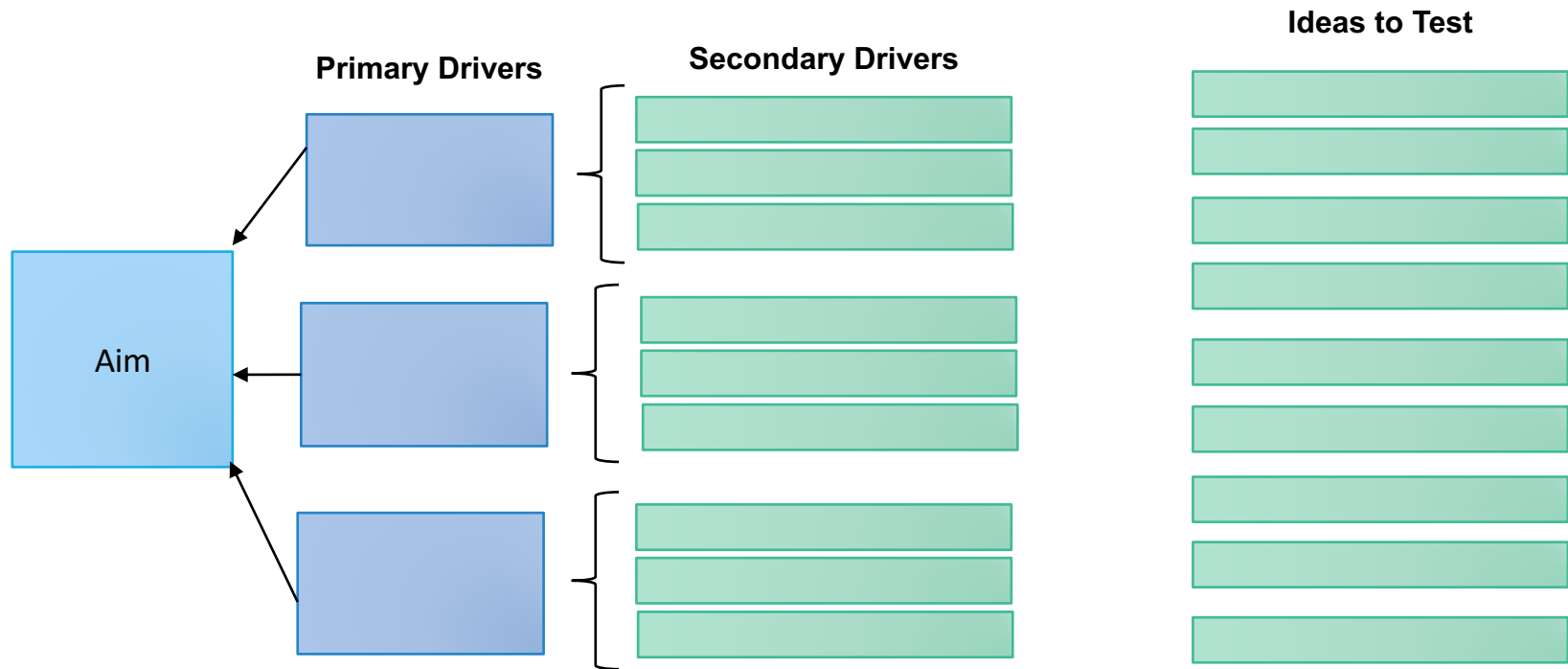


Allows for tests to be designed that will validate the theories and improve our original change idea



Represents our current knowledge about how some aspect of how the system works

# Driver Diagram Template



# Using Driver Diagrams



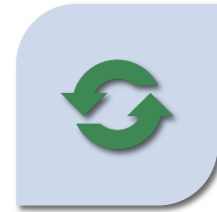
Translates a high-level improvement goal into key opportunities for sub-projects



Helps organize change concepts and ideas



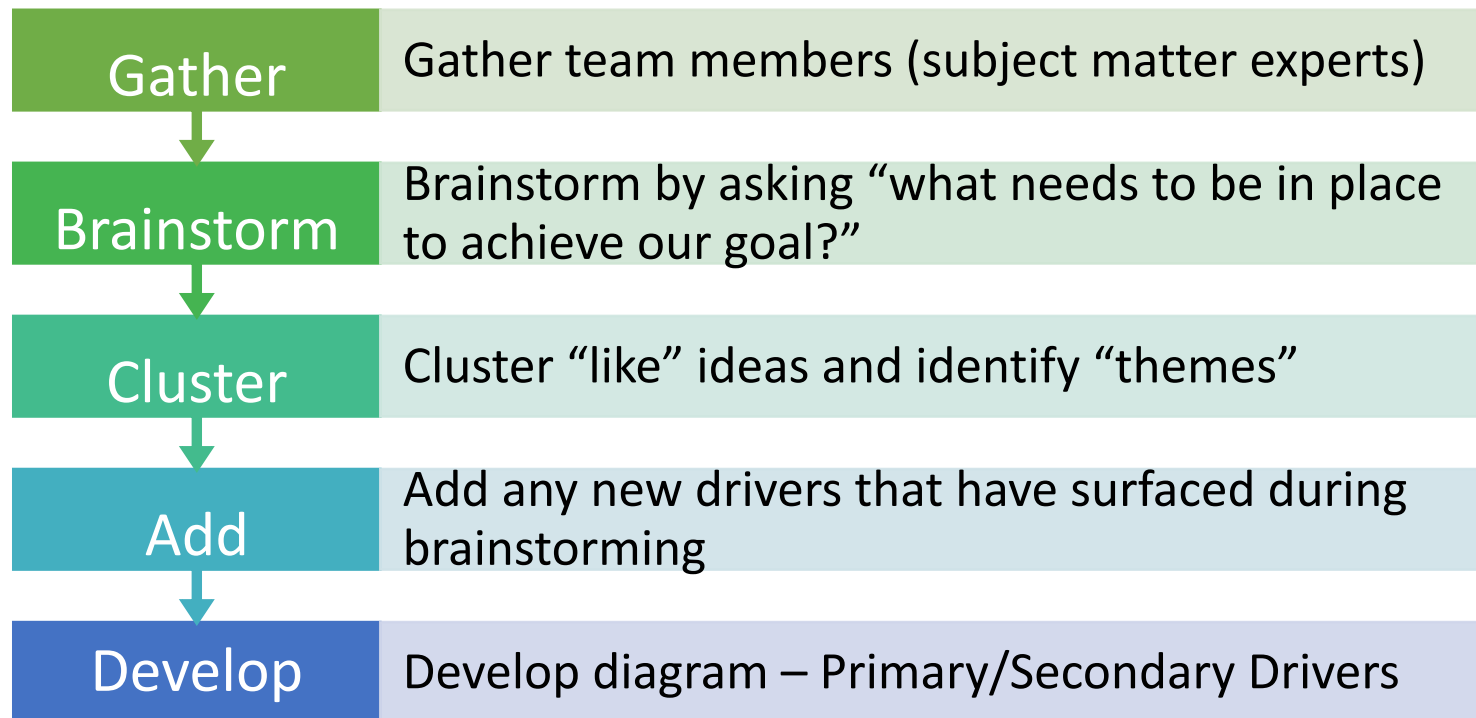
Tests theories about multiple causes and their effects



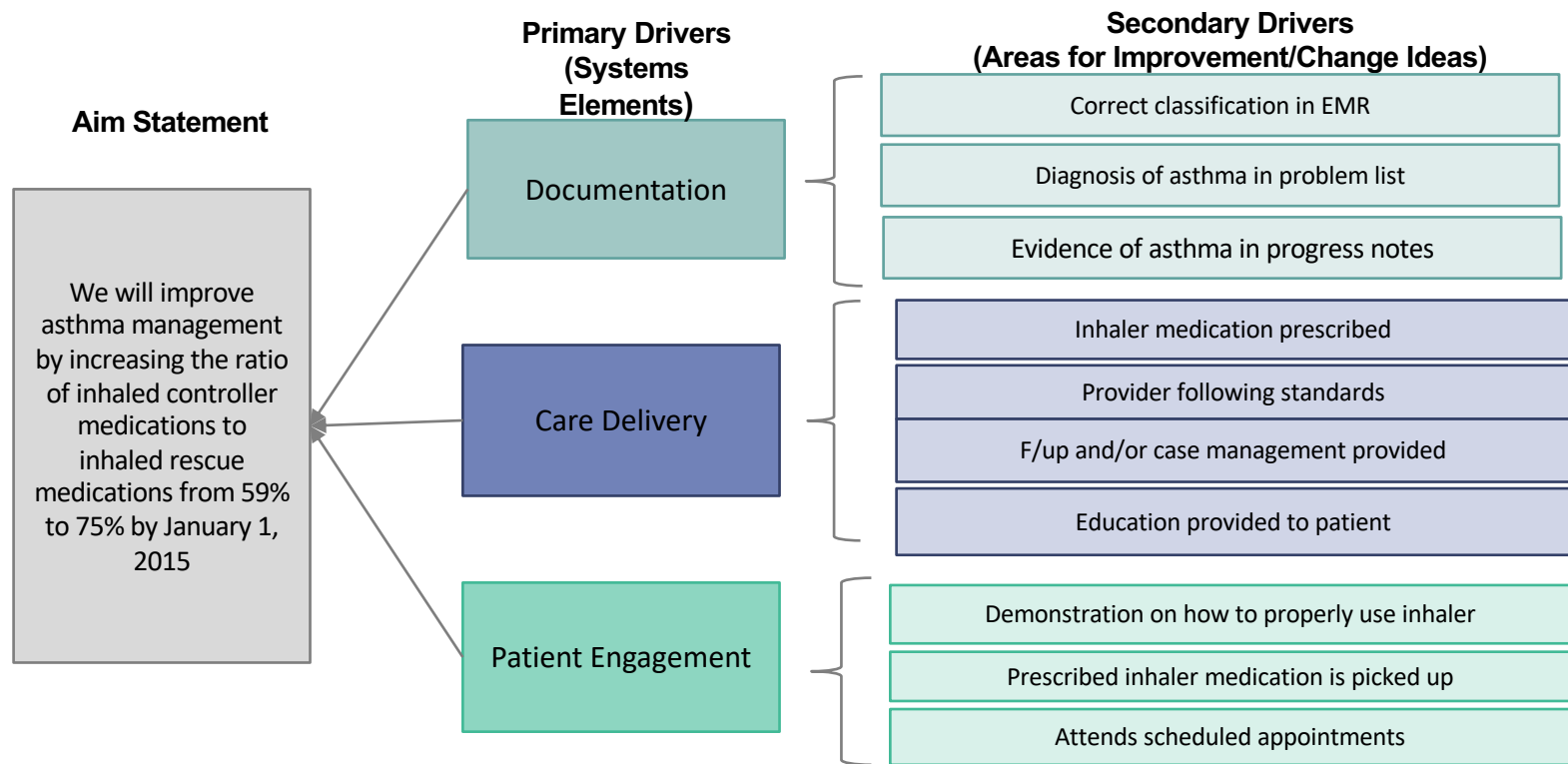
Serves as a communication tool



# Steps to Develop a Driver Diagram



# Driver Diagram Example

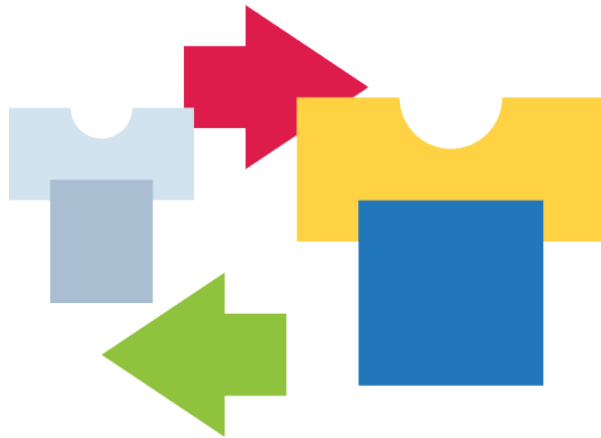


# Things to Remember About Driver Diagrams

- Include those who know the work best
- Two ways to start:
  - Primary drivers can be stated – brainstorm each primary driver
  - If primary drivers are less evident – brainstorm the secondary drivers (working backwards)
- No right or wrong
- One per Aim Statement



# What Changes Can We Make that Will Result in Improvement?



## Generating Change Ideas:

1. Logical thinking about the current system
2. Benchmarking or learning from others
3. Using technology
4. Creative thinking
5. Using change concepts

# The Role of Measurement in QI

## How will know the change is an improvement?

Understand	<ul style="list-style-type: none"><li>• How does the current system perform?</li></ul>
Predict	<ul style="list-style-type: none"><li>• What interventions might improve the performance of the current system?</li></ul>
Evaluate	<ul style="list-style-type: none"><li>• Did our interventions result in improvement?</li></ul>
Monitor	<ul style="list-style-type: none"><li>• Are our improvements sustained over time?</li></ul>
Engage	<ul style="list-style-type: none"><li>• Are we considering what is important for others to know?</li></ul>



# Developing a Measure Set

## Outcome (1 – 3 measures)

- The “voice” of your project
- Relates directly to the aim
- Longer indicator of progress/success

## Process (2 – 3 measures)

- Relates to the secondary drivers and/or changes
- Early indicators of success
- Measures whether parts/steps of a system are performing as planned
- NOTE: Okay to focus on process measures only

## Balancing (1 – 2 measures)

- Evaluates unintended consequences

# QI Measurement Characteristics

1

## Focused on Learning

- Not for scientific research or provider feedback

2

## Simple Methodology

- Small samples
- Frequent sampling (rapid)
- Motivate immediate action (what do we do with what we have learned)

3

## Displayed Over Time

- Tells a story of progress-to-goal
- Highlights system performance

# Developing a PI Team

## ■ Possible Roles:

- **Sponsor** – Executive/Sr. Leader with formal authority and ownership for the process being improved; expected to actively and visibly participate throughout the process
- **Champion** – Leads project identification and prioritization; ensures projects are aligned with business goals/strategy
- **Project Lead** – Ensures meetings are coordinated and team members are invited; facilitates team members through change process; ensures opportunities are available for team members to communicate with stakeholders/leaders
- **Process Expert** – Front-line staff member familiar with the day-to-day process/system being improved
- **Subject Matter Expert** – Provides information/expertise necessary to improve process/system
- **Coach** – Facilitates team leads and/or teams by providing change management skills, resources and tools





# Defining Responsibilities

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- Using RACI:
  - **Responsible:** The person who is assigned to do the work
  - **Accountable:** The person who makes the *final decision* and has *ultimate ownership*
  - **Consulted:** The person who must be consulted *before* a decision or action is taken
  - **Informed:** The person who must be informed that a decision or action *has* been taken



# Working Agreements

- Identifying logistics (when, where, how often?)
- Identify note-takers and those who will capture action items
- Develop ground rules



# Questions and/or Comments



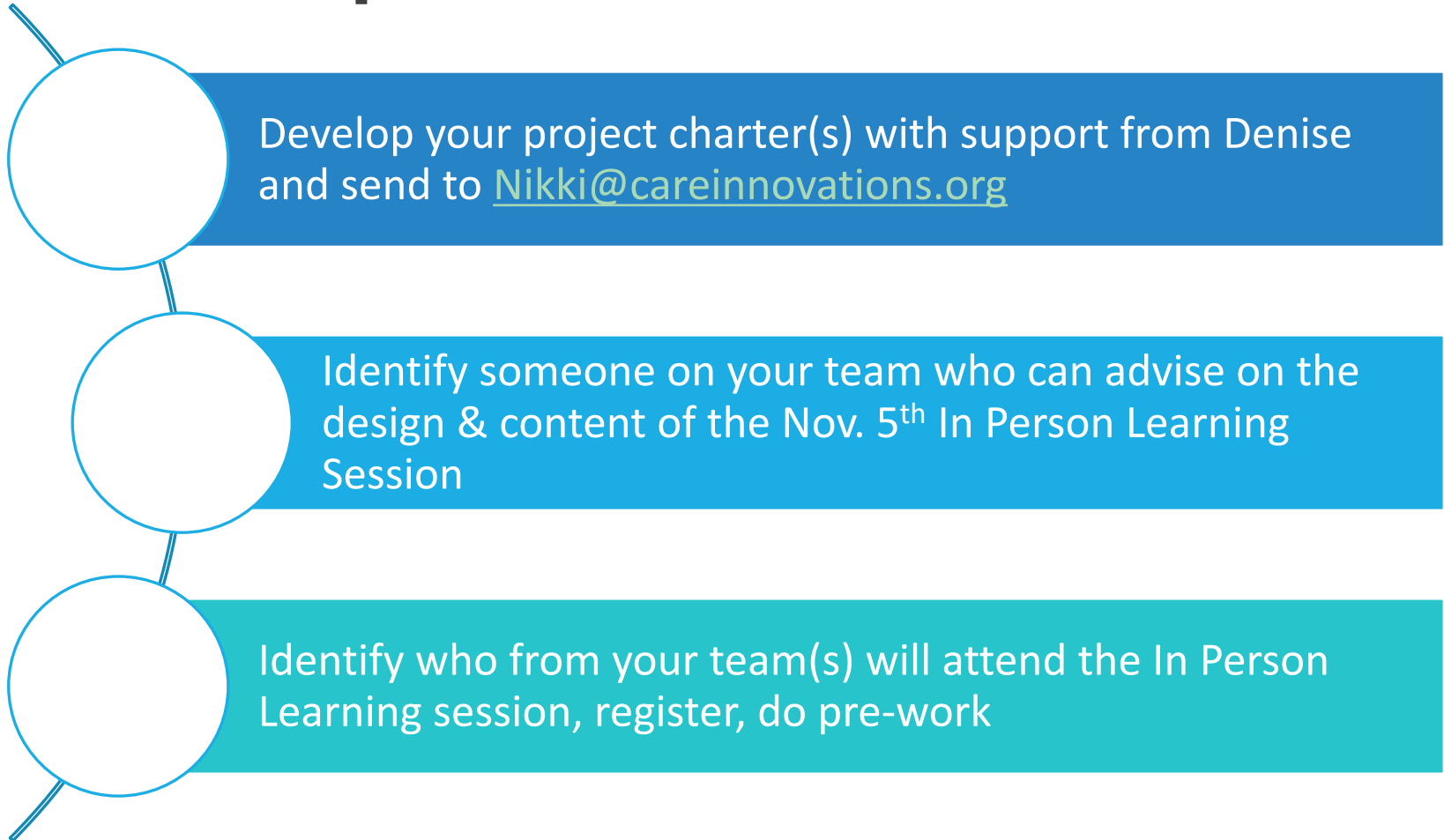


# Save the Date!

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- TC3 In Person Learning Session
- Tuesday, November 5, 2019, 9:30am - 4pm
- **Pacific Palms Resort:** One Industry Hills Parkway  
City of Industry, CA
- Who should attend?
  - Core and extended TC3 grantee teams
  - TC3 site teams, including frontline staff, local QI teams, and champions
  - TC3 Core Support and Learning Team – TA Team, Coach, Evaluation team, Kaiser Permanente
  - Southern California Permanente Medical Group care team
- Registration and agenda details coming soon!

# Next steps



**Thank you!**

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