

# From Complex to Concrete: Teaching PDSA to Your Direct Service Staff



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# Introductions

- Name
- Role in organization
- Experience with quality improvement and PDSA cycles

# Assumptions

- Working knowledge of PDSA cycles
- May have been trained but others in organization are not
- Ready to begin implementing PDSA cycles
- Experienced staff turnover since your last quality improvement effort

# Why Process Improvement?

- **Customers are served by *processes*.**
- **85 percent of customer-related problems are caused by *processes*.**
- **You must improve your processes to better serve your *customers*.**

# Why Process Improvement ?

- Quality-driven
- Customer-centered
- Outcome-focused
- Use Existing Resources
- Not Focused On Individual Staff Performance

# Why Organizational Change

- **Small changes do increase *client engagement*.**
- **Engaged clients are more likely to show up and *continue their services*.**
- **More clients doing well make your work *more rewarding*.**
- **More clients and fewer drop-outs improve the *outcomes*.**

# Small Changes, Big Impacts

**Small changes create a big difference for both clients and staff**

**Effective changes don't have to be expensive**

- Working to make sure clients made it to services “live hand-offs” improved communication between staff and led to better decisions and a 22% reduction in no shows



# The NIATx Model



A **model of process improvement** specifically for behavioral health care settings to improve access to and retention in treatment.



# Focus on Four Aims

- **Reduce waiting times**
- **Reduce no-shows**
- **Increase admissions**
- **Increase continuation**

# Could this work for Healthy Start?

## Behavioral Health AIMS

Reduce waiting time between first request for service and first treatment session

Reduce no-shows by reducing the number of patients who do not keep an appointment

Increase admissions to treatment

Increase continuation from the first through the fourth treatment session

## Healthy Start AIMS

Connect interested participants quickly

Keep participants connected

Meet enrollment numbers

Keep families connected through the two years

WHAT OTHER AIMS ARE YOU ADDRESSING?



# Key Principles

- **Understand and involve the customer**
- **Focus on key problems**
- **Pick a powerful Change Leader**
- **Get ideas from outside the organization**
- **Use rapid-cycle testing**

# 1. Understand & Involve the Customer

## Most important of the Five Principles

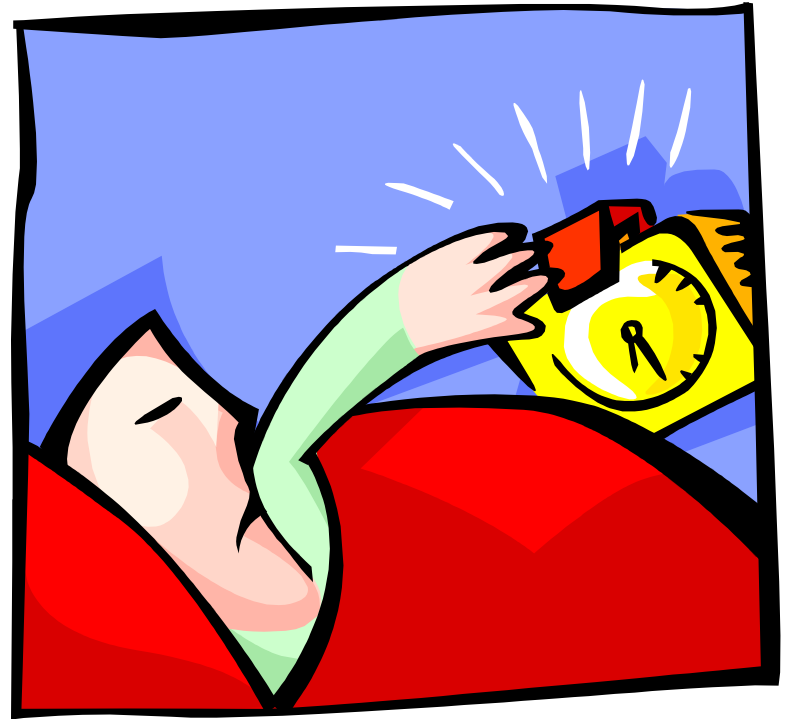
### What is it like to be a customer?

- Your staff can be considered customers, too.
- Conduct walk-throughs
- Hold focus groups and do surveys

## 2. Focus on Key Problems

What **keeps the CEO awake** at night?

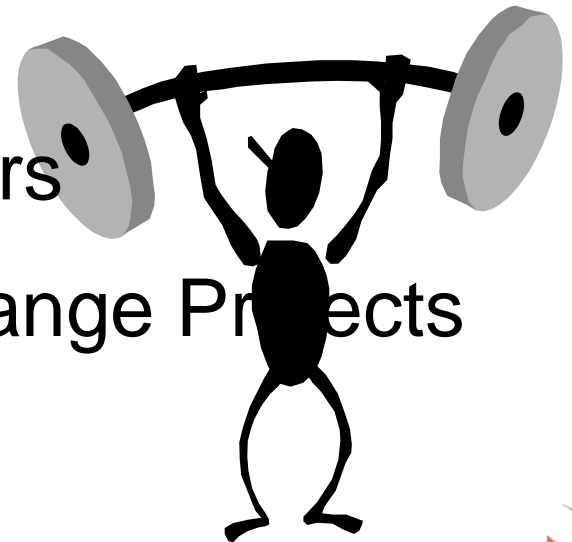
What **processes** do staff and customers identify as **barriers** to excellent service?



# 3. Powerful Change Leader

## The Change Leader must have...

- Influence, respect, and authority across levels of the organization
- A direct line to the CEO
- Empathy for all staff members
- Time devoted to leading Change Projects



# 4. Ideas from Outside Organization

Real creative problem-solving comes from looking beyond the familiar

Provides a new way to look at the problem

- **Access**
  - Walk-in clinics in Wal-Mart
- **Client Engagement**
  - Hair Dressers
  - Coffee Shops
- **Client Handoffs**
  - Hertz Rental Car
  - Hyatt Hotels

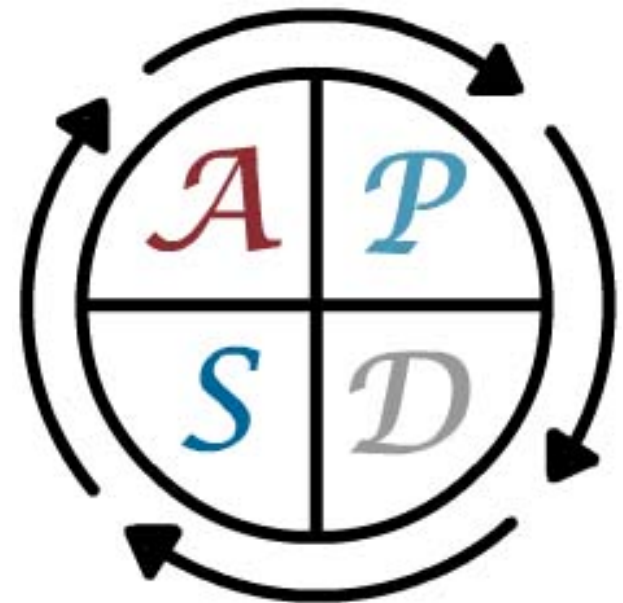
# 5. Rapid Cycle Changes

Pilot tests or experiments

Two-four week cycles

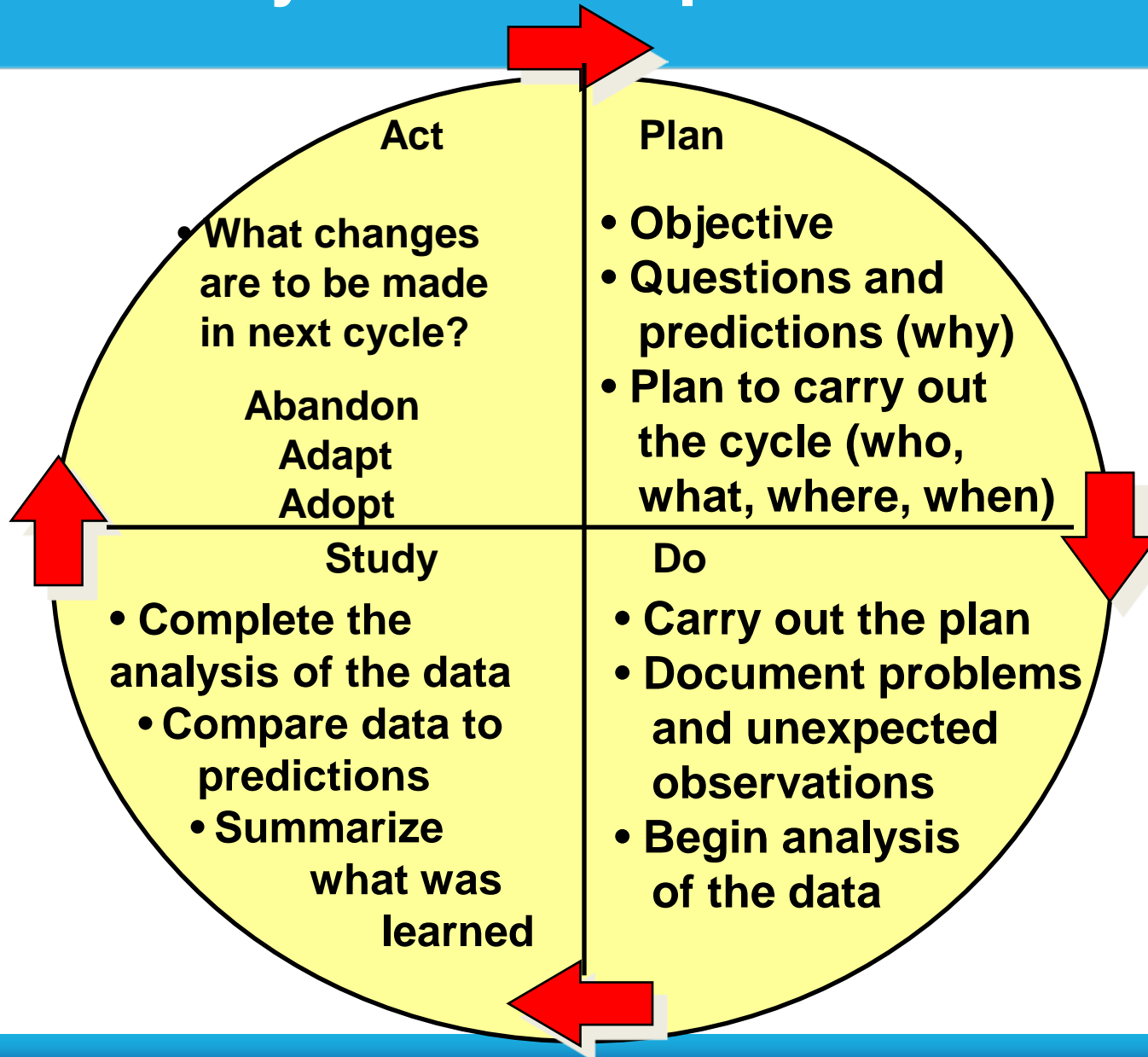
Many small changes

can quickly add up to  
make a big impact





# PDSA Cycle for Improvement



# Action Phases of Change

- Understand customer needs
- Decide what you want to accomplish
- Identify when an aim is an improvement
- Select and test changes
- Sustain the gains

# Why Walk-through?

## The walk-through:

- Helps you understand the customer and organizational processes
- Provides a new perspective
  - Allows you to *feel* what it's like
  - Lets you see the process for what it is

# Why Walk-through?

**Seeks out and identifies real problems**

**Generates ideas for improvement**

**Keeps you asking *why?*...and *why?*  
again**

# Action Phases of Change

- Understand customer needs
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# Role of the Executive Sponsor

**Senior leader in the agency**

**Must see change/improvement as a priority**

**Identifies the problem and articulates the vision**

**Demonstrates commitment to the process (time, resources)**

**Empowers the change leader**

# Selecting a Change Leader

**Person has sufficient power and respect to influence others at all levels of the organization.**

**Person has the ability to: instill optimism, has big-picture thinking, is focused and goal-oriented, and has a good sense of humor.**

# Change Leader Responsibilities

**Serves as a catalyst to develop ideas**

**Successful communicator: facilitates change team meetings, is consistent, concise (data), creative, engaging (incentives), and a skilled listener.**

**Minimizes resistance to change**

**Keeps the Executive Sponsor updated on change team activities**



# Creating Change Teams

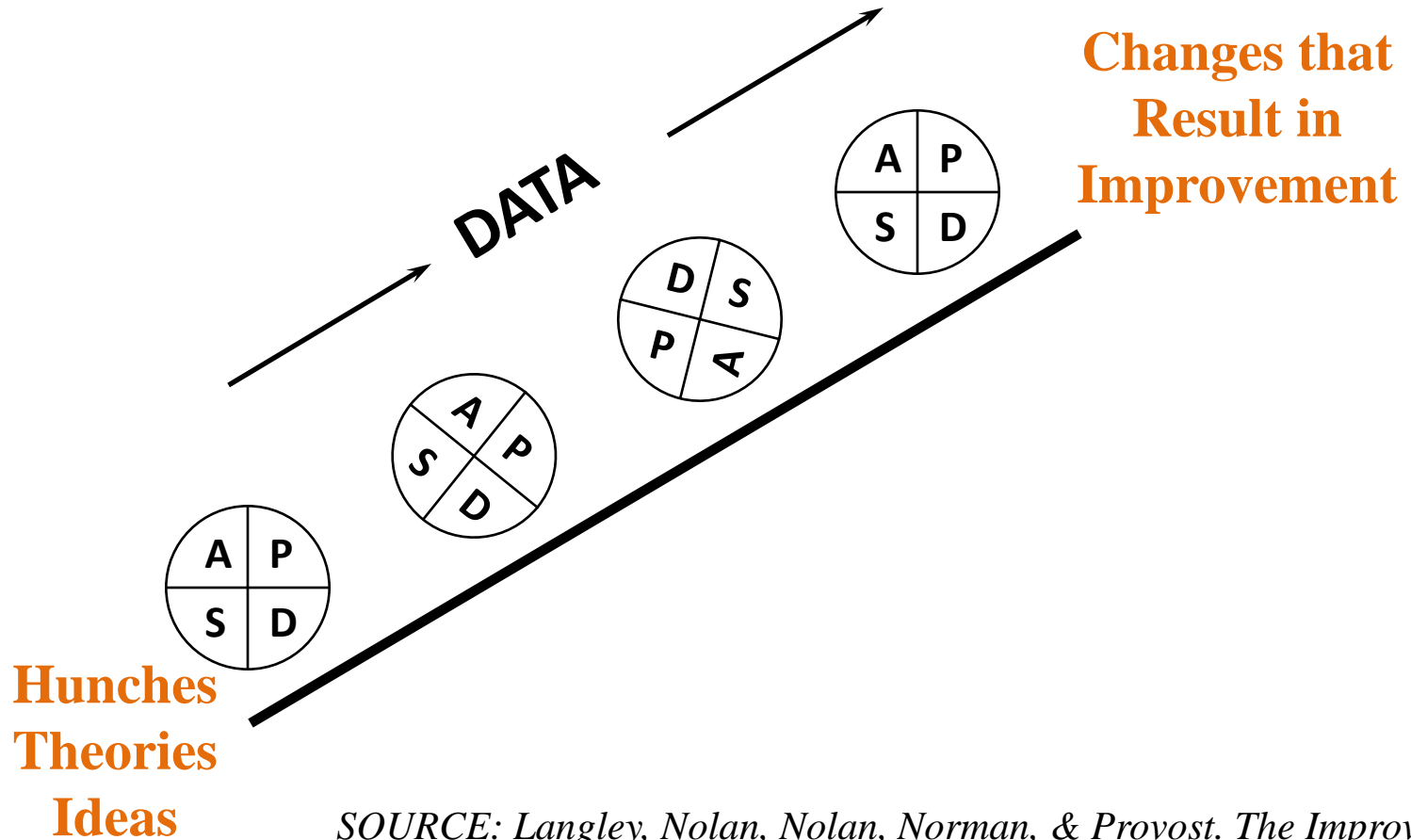
- Small group – no more than 7 people
- Include people who will be affected by the change or who could sabotage it if they don't like it
- These are short term ad-hoc groups – when the project is done the group is disbanded

# Change Team Role

## Collaborate on making changes to address the Problem

- Meet to identify potential solutions
- Meet regularly to review progress
- Adapt change project as necessary
- Review and interpret data
- Identify when change project is complete and idea is ready to spread

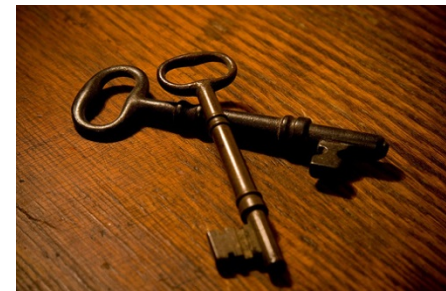
# Process Improvement



*SOURCE: Langley, Nolan, Nolan, Norman, & Provost. The Improvement Guide, San Francisco, Jossey-Bass Publishers, 1996*

# Keys to Change Project Success

1. Have a clear objective
2. Implement only 1 new thing at a time
3. Make sure everyone implements change as planned
4. Start small
5. Study the results before making modifications
6. Do not hesitate to start a new cycle



# Frequent start-up issues

## Measuring the impact of change

- What measures to use
- Documenting the change process
- Recording data daily; reviewing data weekly

## Having the right people in key roles

- Executive Champion or Sponsor
- Change Leader with time to do the job
- Small enough Team to be effective

## Assuring key participants understand the service improvement model and process

## Lack of customer involvement in establishing a change objective

# PDSA Steps

**Plan**: Set aim, design and develop a change

**Do**: Test the change, measure/record results

**Study**: Study data

**Act**: Adopt, Adapt, Abandon

Repeat PDSA Cycles until you reach your goal.



# Learning Objectives

## Participants will:

- Learn to define clear measures (data collection)
- Learn to assess progress toward an aim (data analysis)

# The Airplane Exercise

## Description:

A small group activity to demonstrate use of the PDSA cycle

## Objective:

Learn how to use the PDSA approach with a team in order to achieve a specific aim



# The Aim: Get as Close to the End of the Runway as Possible

- 1. PLAN:** Design a paper plane using the materials provided. Choose a change leader and a data coordinator
- 2.DO:** Choose one person to be the flier. Have them make three flights.
- 3.STUDY:** After each test flight, the data coordinator should measure the distance the plane traveled down the runway and record this on the change project form. Calculate the average distance from the end of the runway in either direction for the three flights.
- 4.ACT:** Based on the measurements, review the design of your plane and look for improvements (what can we do that will result in an improvement). Make just **ONE** change to the design of the plane, and repeat steps 1-4 until you have collected data for 3 cycles (original design cycle + 2 change cycles).

