THE UNIVERSITY OF CHICAGO | Biological Sciences Division

Doing More With Less: Amplifying Your QI Efforts Through Capacity Building

CQI Conference

October 12, 2023 – Champaign-Urbana, Illinois

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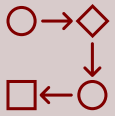
Agenda

Getting Engagement

- Systems Framework
- Capacity and Capability



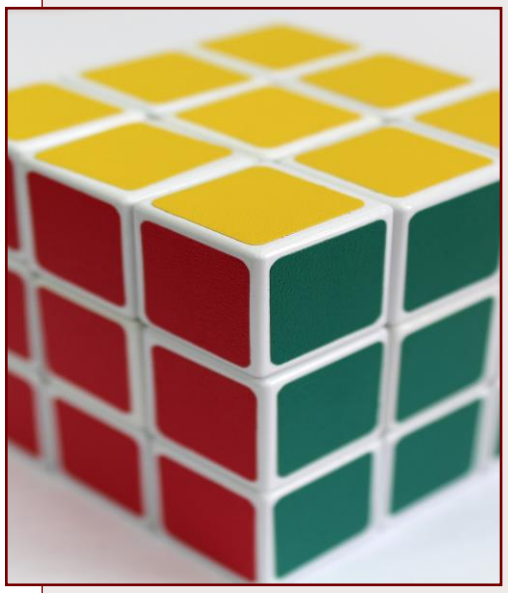
Leading Engagement

- Where do we begin?
- Who is involved?
- How do we do it?

Maturing Your Engaged Audience

- Supporting Development
- Leveraging Resources

Objectives



By the end of this event, we should be able to:

- Understand the framework and characteristics of a **learning health system**
- Describe the relationship between **capacity and capability building** and a learning organization
- Discuss **techniques for engaging teams**
- Explore how to best **leverage resources** to amplify your QI efforts

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In which domains do you experience the greatest challenges?

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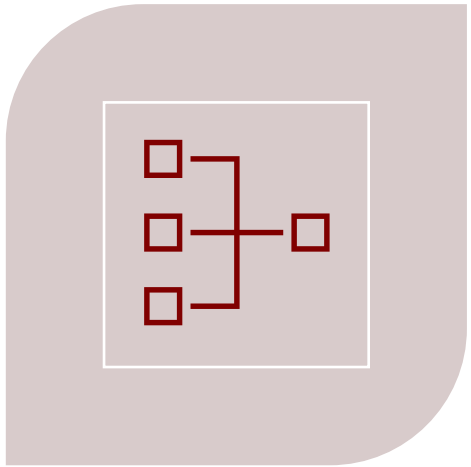
Getting Engagement



SYSTEMS FRAMEWORK

CAPACITY AND CAPABILITY

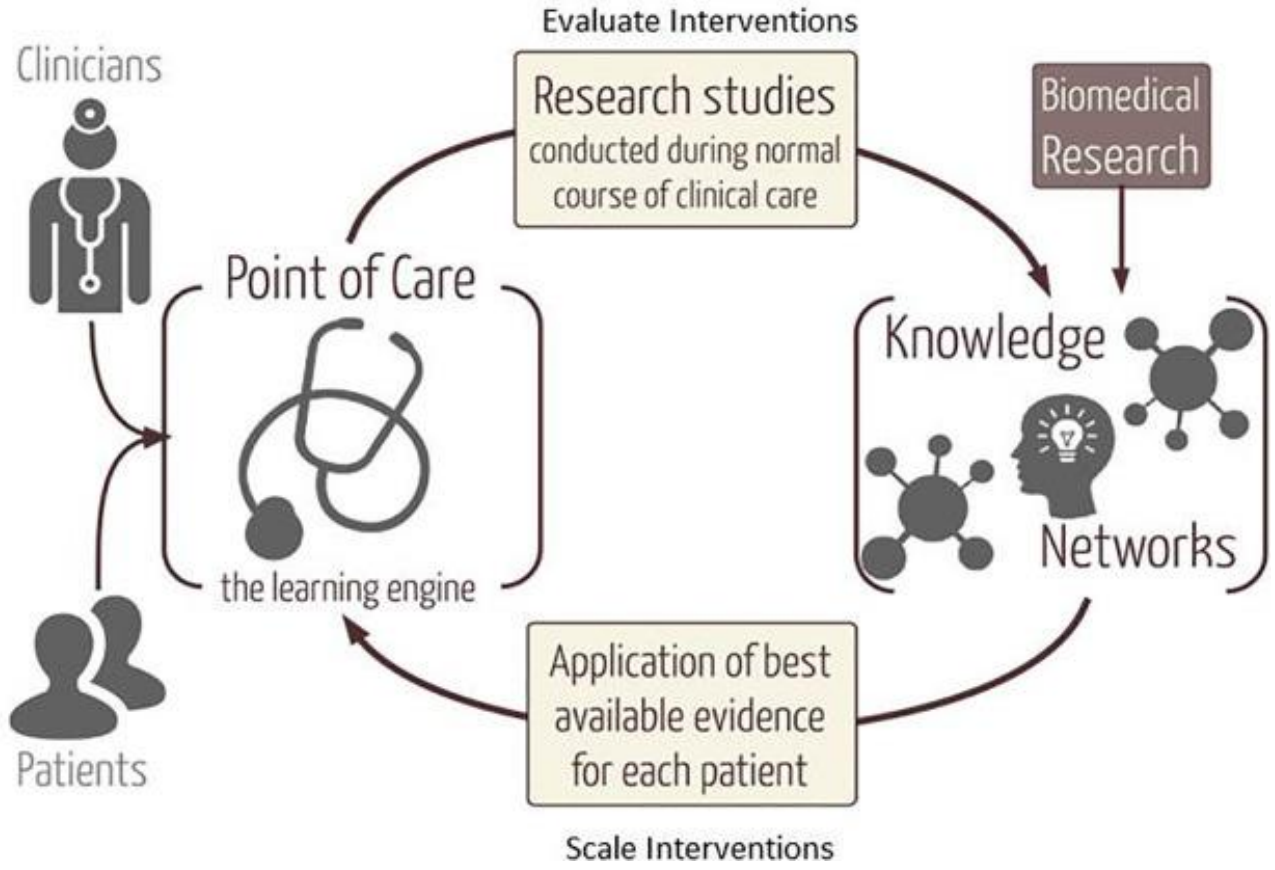
“A bad system will beat a good person every time.”

--W. Edwards Deming

Systems-thinking to frame QI and engagement

A Learning Health System (LHS)

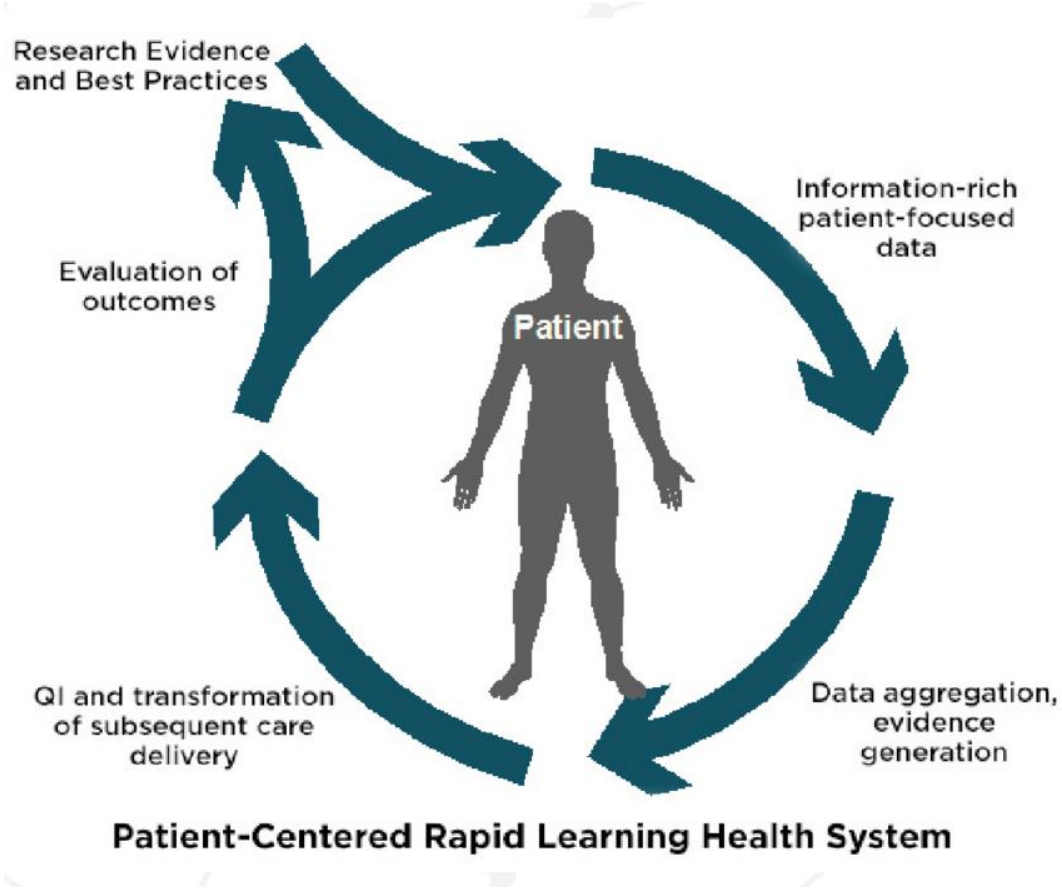
- Generates and applies the **best evidence**
- **Discovery** is a natural outgrowth of patient care
- Ensures **innovation, quality, safety and value** in healthcare



LHS: Rapid-learning and application

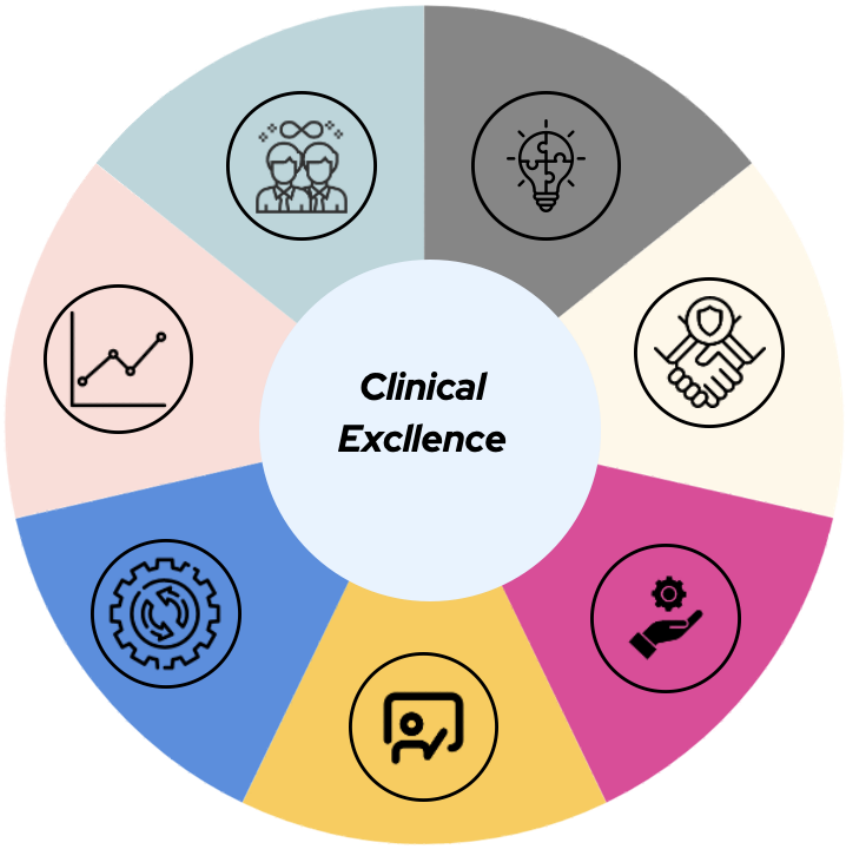
We learn from one another, evaluate our work, and share lessons learned in everything we do.

- We **cultivate lessons learned** and share them across teams
- We **accelerate the cycle of improvement**, leveraging existing work and insights across teams
- We **generate knowledge** about how to achieve outcomes as a byproduct of clinical performance improvement
- We **strategically amplify lessons learned** externally through peer-review, publications, speaking engagements, and participation in external collaboratives



Wysham et al. Development and Refinement ofa. Learning Health Systems training Program. eGEMS. 2016

This LHS framework is fundamental to achieving (clinical) excellence



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Highly Reliable System

strives to achieve error-free performance and safety in every procedure, every time - all while operating in complex, high-risk or hazardous environments - through predictable and repeatable systems

Approach and Tools: Elimination of unwarranted variation, standardized care across the system

- Standard Work
- Clinical pathways
- Standardized templates, order sets
- Value Stream Mapping
- Kaizen Events

+

Learning Health System

progress in science, care delivery, and care culture align to generate new knowledge as an ongoing, natural byproduct of the care experience, and seamlessly refine and deliver best practices for continuous improvement in health and health care.

Approach and Tools: Build capabilities and capacity, learn, scale

- Learning communities (simulation)
- Mixed Methods Evaluation at local and system levels
- Implementation Science
- Dissemination strategies
- Embedded Pragmatic Research

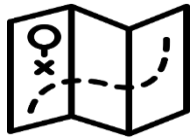
Engagement in these frameworks can overcome QI barriers

- Sets organizational culture
- Ensures Accountability – to patients/clients
- Ingests innovation into everyday processes
- Places incremental change into a larger context
- Engages everyone (not just formal QI roles)

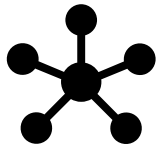
Improvement and Transformation requires workforce Capabilities and Capacities to implement and evaluate

QI and transformation of subsequent care delivery

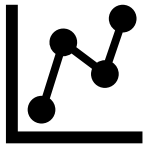
Widespread **competency** in quality improvement across the workforce



Aligned priorities: both across the team and with the health system



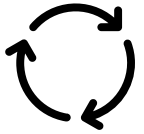
Culture of **continuous learning** and sharing of lessons learned



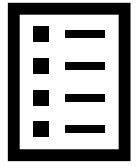
Widespread **data literacy and access** to outcomes and process measures

Optimal adherence to **standardized** care delivery **processes**

Collaborative, nimble, and empowered clinical performance leadership teams with clear **accountability and authority**

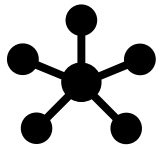


Ability to make **rapid-cycle improvements**



Ability to **de-implement** unnecessary practices and workflows

Building Engagement through Capacity and Capability is Essential



Capacity for improvement

- *Alignment* of improvement priorities with job role priorities
- *Integration* of improvement into daily work
- *Incentivization* of improvement (personal, team level, organization level)
- *Culture* that encourages continuous iteration and improvement

Capabilities for improvement

- Clear *understanding* of the solution to be implemented
- Knowledge of improvement *methods*
- *Data* fluency
- *Systems and processes* built to support improvement

Leading Engagement

WHERE DO WE BEGIN?

WHO IS INVOLVED?

HOW DO WE DO IT?

“If you want to go fast, go alone;
if you want to go far, go together.”

--most often cited as an “African proverb,”
though it’s also attributed to Warren Buffet, Hilary Clinton, Cory Booker, Al Gore and others.

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How confident do you feel leading quality efforts in your organization?

ⓘ Start presenting to display the poll results on this slide.

Leading Engagement

While confidence and skills are great, leading successful transformation begins with **culture and leadership**

Shared principles and practices help individuals, teams, and systems evolve and excel

Thoughtfully **engaging and equipping all team members** in advancing transformation builds capacity and capability

Where do we begin?

E⁴ Leadership

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Equity is the foundation of E⁴ Leadership

We all **Engage** in improvement efforts

We **Evolve** to meet diverse and changing needs

We **Excel** at using our expertise to remain **At the Forefront** in all we do

E⁴ Leadership supports our team in creating innovative solutions for the patients of today and tomorrow

Goal: Leverage E4 Leadership to support and develop 12,000 inter-dependent problem solvers

Leading Engagement through Continuous Improvement

- **Plan-Do-Study-Act** is an approach of rapid experimentation based in the scientific method
  - Bias for action and tolerance for unexpected outcomes
- A **system of daily management** (MDI) emphasizes incremental improvement every day
- E4 Leadership **tools and methods** provide a common language to accelerate improvement across the organization

Managing to Outcomes — Which Ones?

A small sampling of what an academic medical center manages:

The Joint Commission

	LEAPFROG HOSPITAL SAFETY GRADE	CMS 5-Star Quality Rating System	vizient	BEST HOSPITALS U.S.News RANKINGS
AT THE FOREFRONT UChicago Medicine	A FALL 2022	★★★	★★★★ #24	10 Adult Specialties 4 Children's Specialties

MAGNET with Distinction AMERICAN NURSES CREDENTIALING CENTER

IDPH ILLINOIS DEPARTMENT OF PUBLIC HEALTH

Offices of Risk Management, Compliance, and Internal Audit

HFS Illinois Department of Healthcare and Family Services

Not to mention….

- Stakeholder feedback (patient surveys, online reviews)
- Employee satisfaction
- Clinical productivity and benchmarks
- Risk and Safety
- Grants and awards
- Value-based care contracts
- New programs
- Electronic Health Record (EHR) Data

How do we know what initiatives to focus on?

Where do we begin? Forums for Prioritizing and Managing

Set higher-level priorities

- Strategic/ Annual Planning
- Board Meetings
- External Objectives

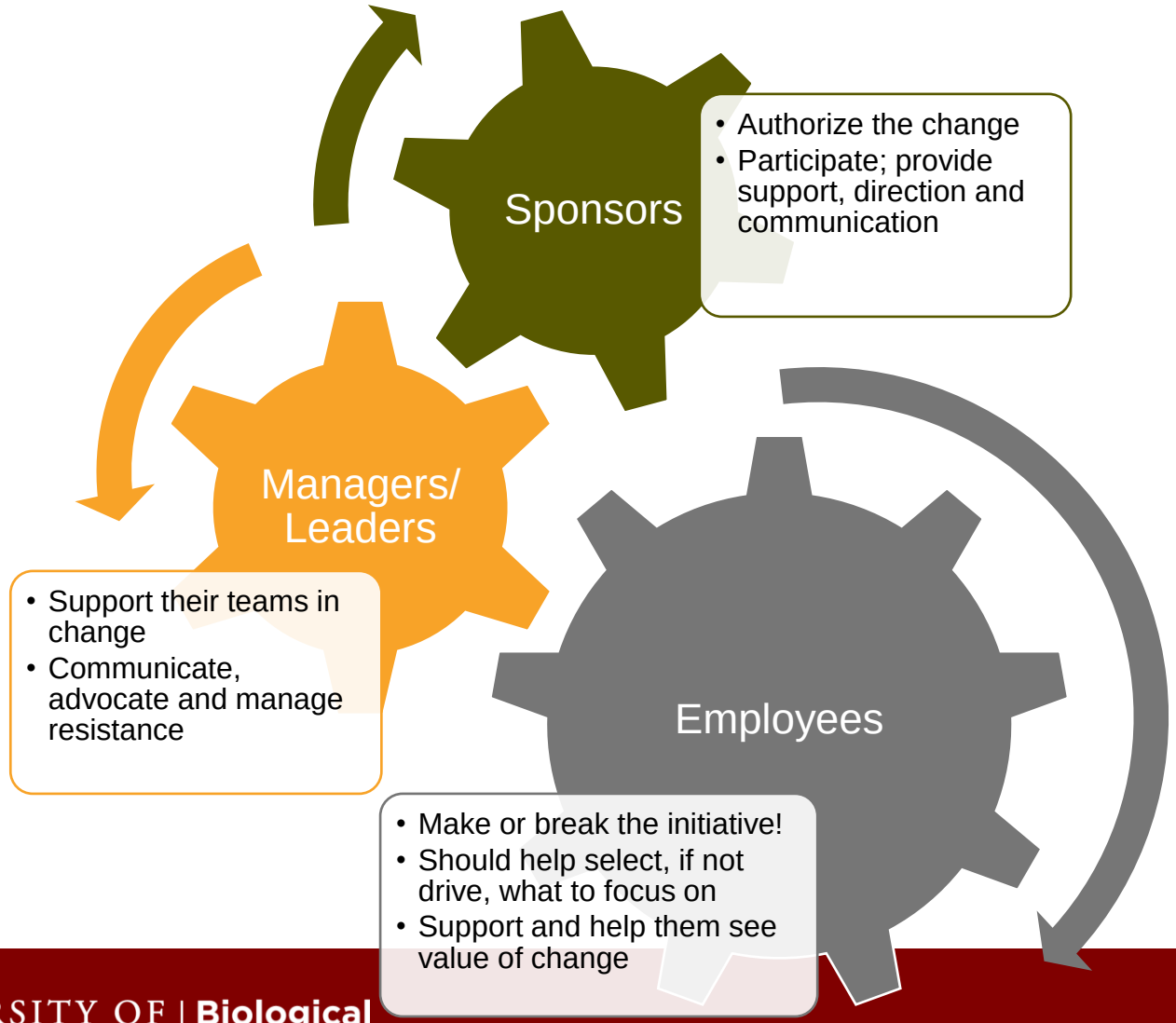
Explore and problem-solve

- Improvement Events
- Retreats

Monitor progress and metrics

- Committees
- Project Teams/ Workgroups
- Dashboards
- Managing for Daily Improvement (MDI)
- Huddles and rounding

Who is Involved? Stakeholders and Roles



Enabling Roles

Change Practitioner – Apply structure and intent to change, enable and equip other roles through facilitation of change

Project Manager – Focus on designing, developing, and delivering technical solution by moving things forward

Enabling roles should:

Collaborate and help identify and support core team

Build capability and capacity

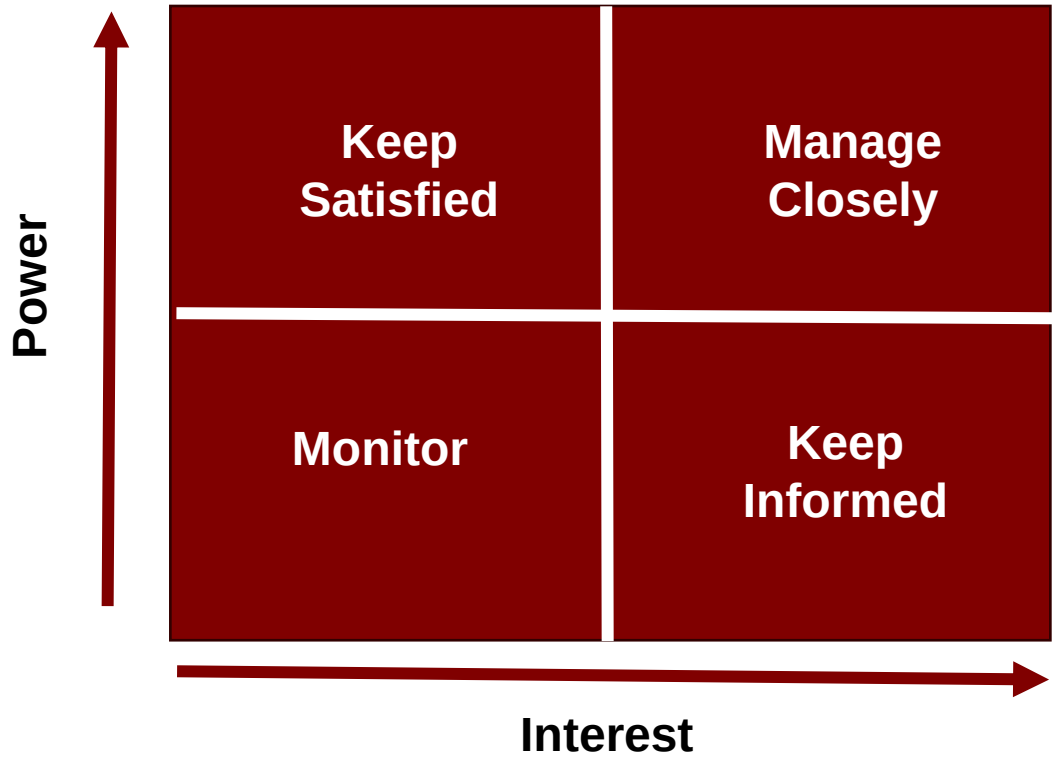
Adapted from PROSCI Change Management Practitioner Program Manual, p. 23

Who is involved? Identifying Stakeholders

- Activity – Part 1
  - » Pick a current or upcoming project
  - » List as many stakeholder roles as possible
  - » Share

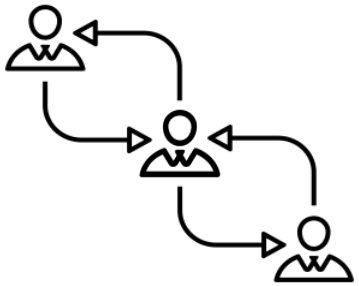
Who is Involved? Engaging Stakeholders

- Activity – Part 2 - Stakeholder Power-Interest Matrix

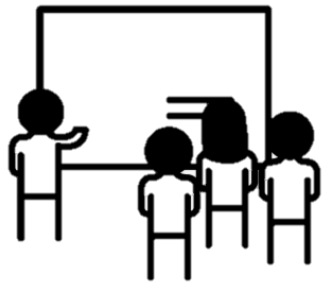


- Think about your identified stakeholders in terms of how much *Interest* and *Power* they have in the project
- Put each of your identified stakeholders in one of these 4 categories
- Think about possible forums you might leverage to engage each group
- Share and provide feedback

How do we do it? Managing for Daily improvement (MDI)

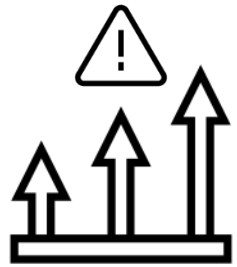


Managing for Daily Improvement, or MDI, is one of UCM's critical management processes for **information flow, escalation, and problem solving**



MDI is a structured system **conducted through daily team huddles,** with units, departments, and cross-functional teams

MDI utilizes boards to **monitor metrics, team readiness, and project status**



All team members are **trained in approach** and lead huddles and coach teams on problem-solving and escalation

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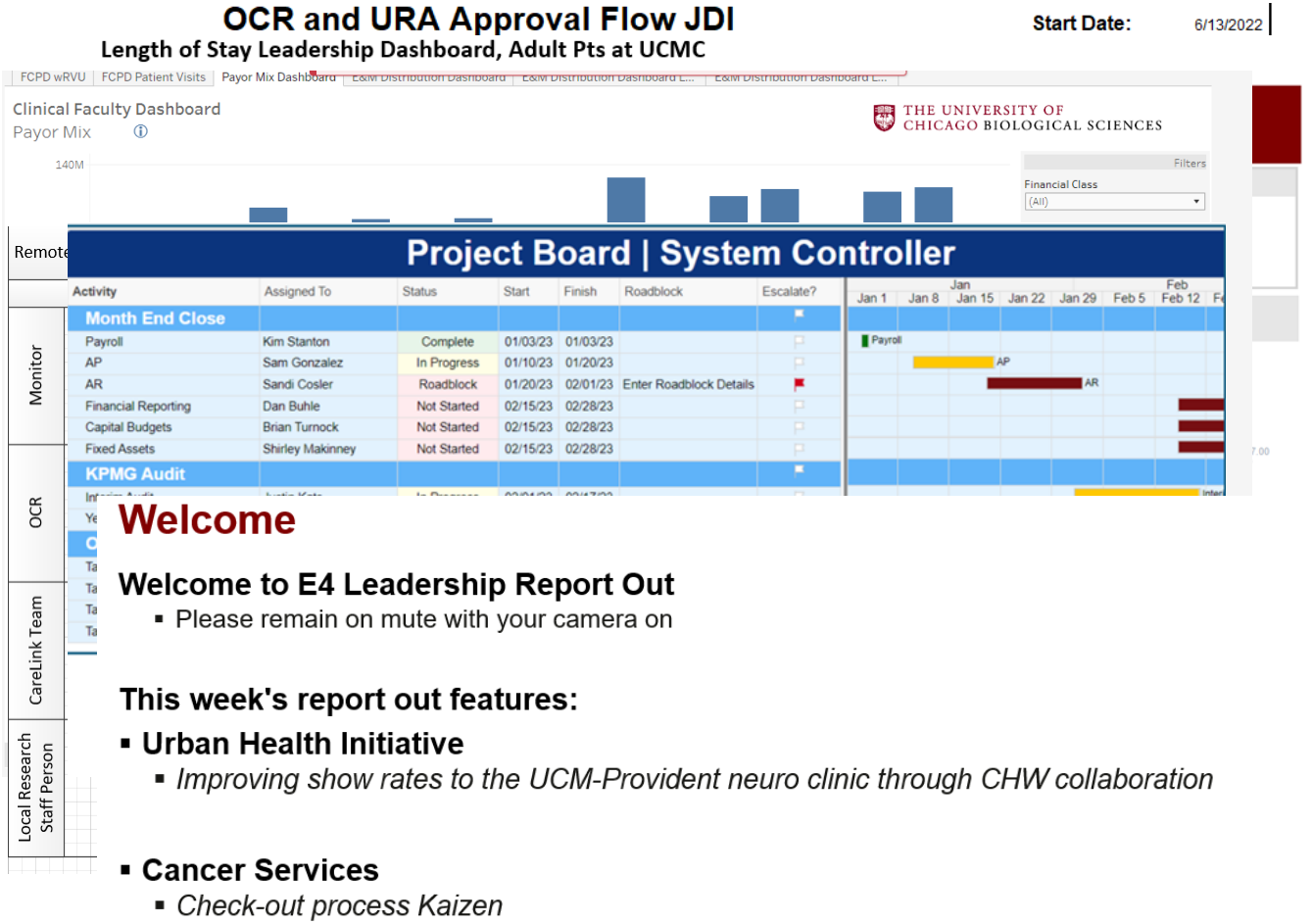
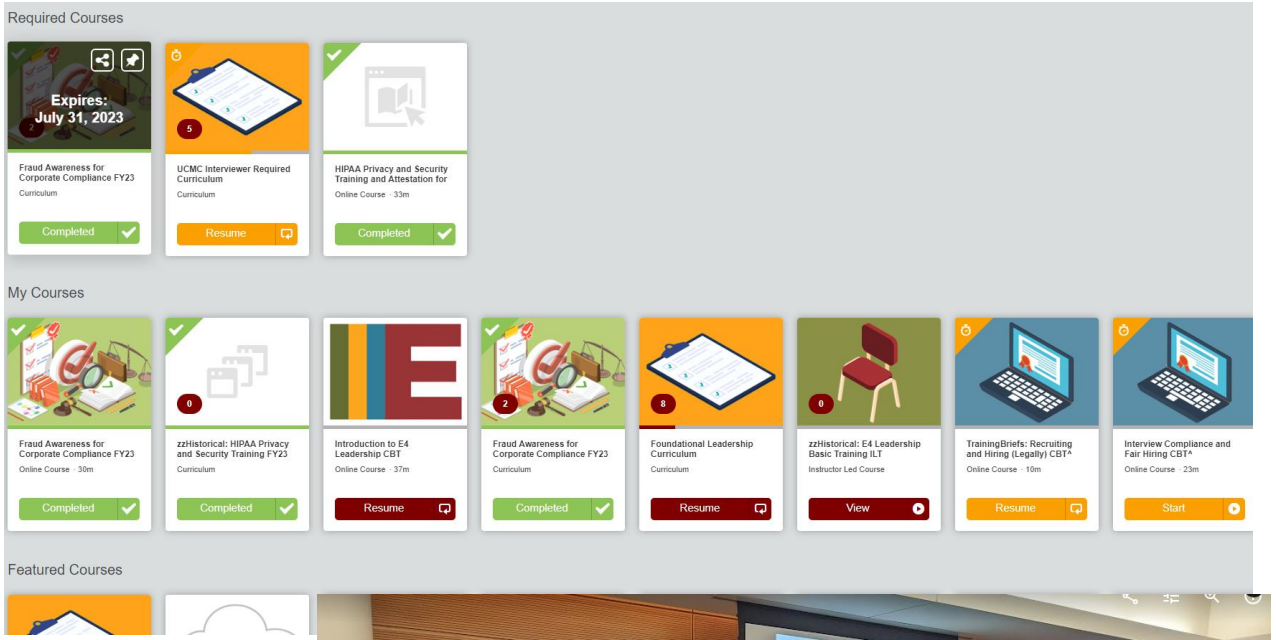
How do we do it? Tools to Make Processes and Progress Visible

- Project Charters (e.g., A3)
- Dashboards (e.g., MDI) and reports
- Process/Value Stream Maps
- Project Management Tools
  - » Action logs, Gantt charts, Project Boards, SmartSheet
- Report Outs



How do we do it? Tools to Help Develop Capabilities

- Internal trainings
  - » Introduction to E4 Leadership
  - » Managing for Daily Improvement – Basics & Advanced
  - » Advanced Problem Solving
  - » Quality & Patient Safety Fundamentals
- Collaboratives
  - » Lunch & learns
  - » Affinity groups and committees
- Leveraging external knowledge
  - » School of Medicine
  - » Clinicians
  - » Other departments, organizations, industries



Maturing Your Engaged Audience

SUPPORTING DEVELOPMENT

LEVERAGING RESOURCES

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Where do you turn for support in the work you do?

ⓘ Start presenting to display the poll results on this slide.

Mentorship and Sponsorship

- Actively seek out opportunities
- Can be formal, informal, or bi-directional
  - Professional Devolvement
  - Emotional Support
  - Accountability
  - Access
  - Institutional Knowledge

SPONSORS ACT

Sponsors...

- connect protégés to career opportunities.
- advocate for protégé's advancement.
- support risk-taking.
- publicly endorse protégés.
- expect high performance in return.
- help protégés confront and interrupt bias.

MENTORS ADVISE

Mentors...

- reduce isolation and stress.
- navigate unwritten rules.
- build confidence.
- provide tips and strategies.
- promote inclusion to company.

https://ncwit.org/resources/sponsors-vs-

Capability and Capacity Building Resources

No / Low Cost

- Mentorship and hands-on collaboratives
- Staff rotations and rounding
- Internal training opportunities
- Student engagement
  - Internships
  - Masters' projects
- Affinity groups and learning collaboratives
- Auditing classes
- Webinars and workshops
- Publicly available trainings (IHI, AHRQ, etc.)
- CQI Conference!

Some Cost

- Certifications
  - Lean/6 Sigma (Belts)
  - Change management
  - Project management
  - Healthcare quality orgs
  - Data visualization
  - Informatics and analytics
- Degrees
  - Public Health
  - Administration (social service, policy, business)
  - Health Informatics
  - Change Management, Program Evaluation
- Professional organization memberships, conferences

Maturing Your Engaged Audience: Tips and Considerations

- Different learning styles and approaches
- Your team's needs and strengths
  - Do you need capacity, capability?
  - Who has something to teach?
  - What skills and knowledge can you leverage?
- What learning and skills are most valued in your field
  - Six Sigma/Lean
  - Change, Project Management
  - Institute for Healthcare Improvement
  - Degree
  - Other?

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Discussion

Appendix

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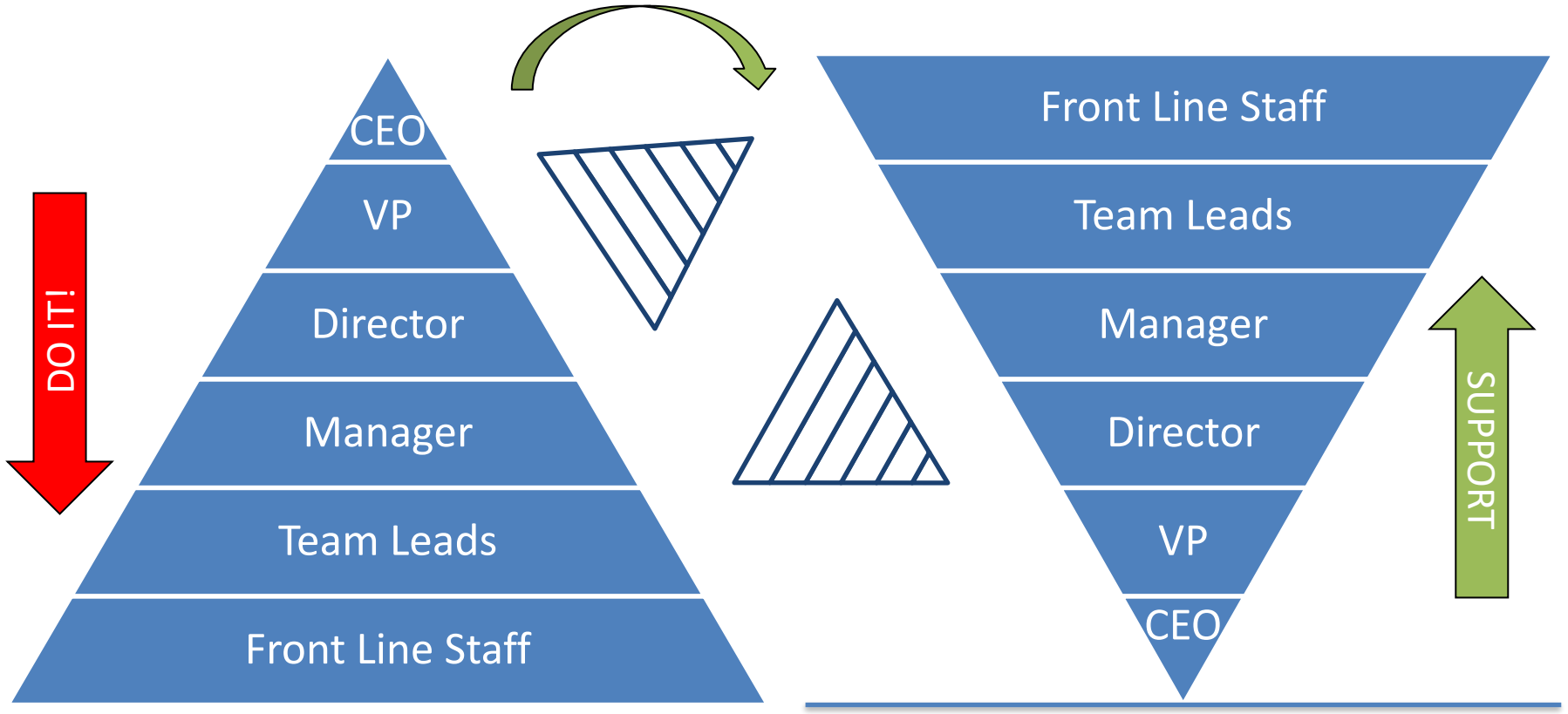
Examining Roles in Leading Engagement



Traditional Management

E^4 Leadership

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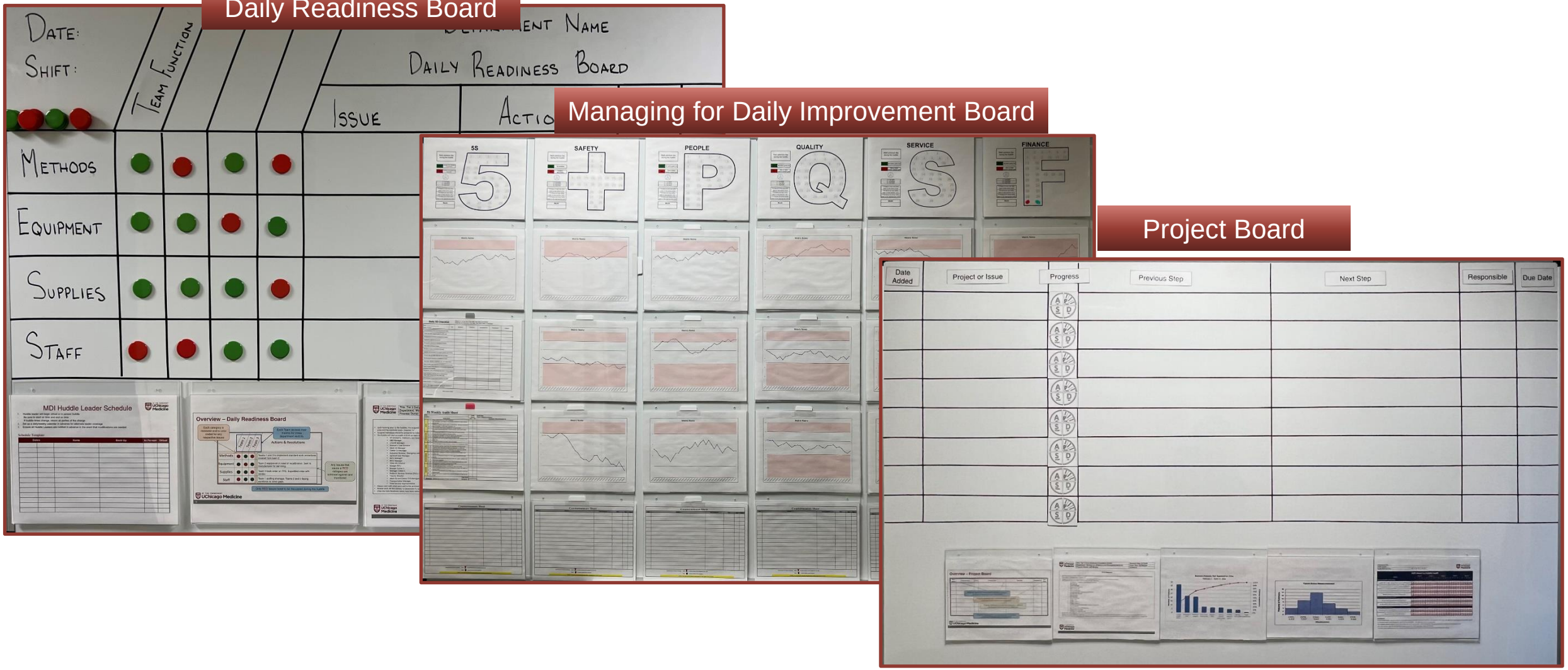
What does MDI look like?

Daily Readiness Board

Managing for Daily Improvement Board

Project Board



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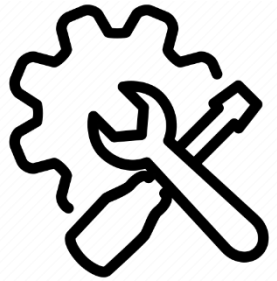
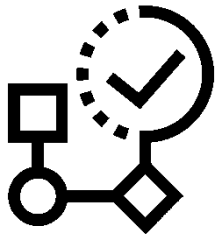
Benefits to MDI



Monitor department **metrics** and determine **progress**

Identify gaps and issues through **visual management**



Issue **resolution** through **escalation**

Drives **accountability** through ownership of **countermeasures**

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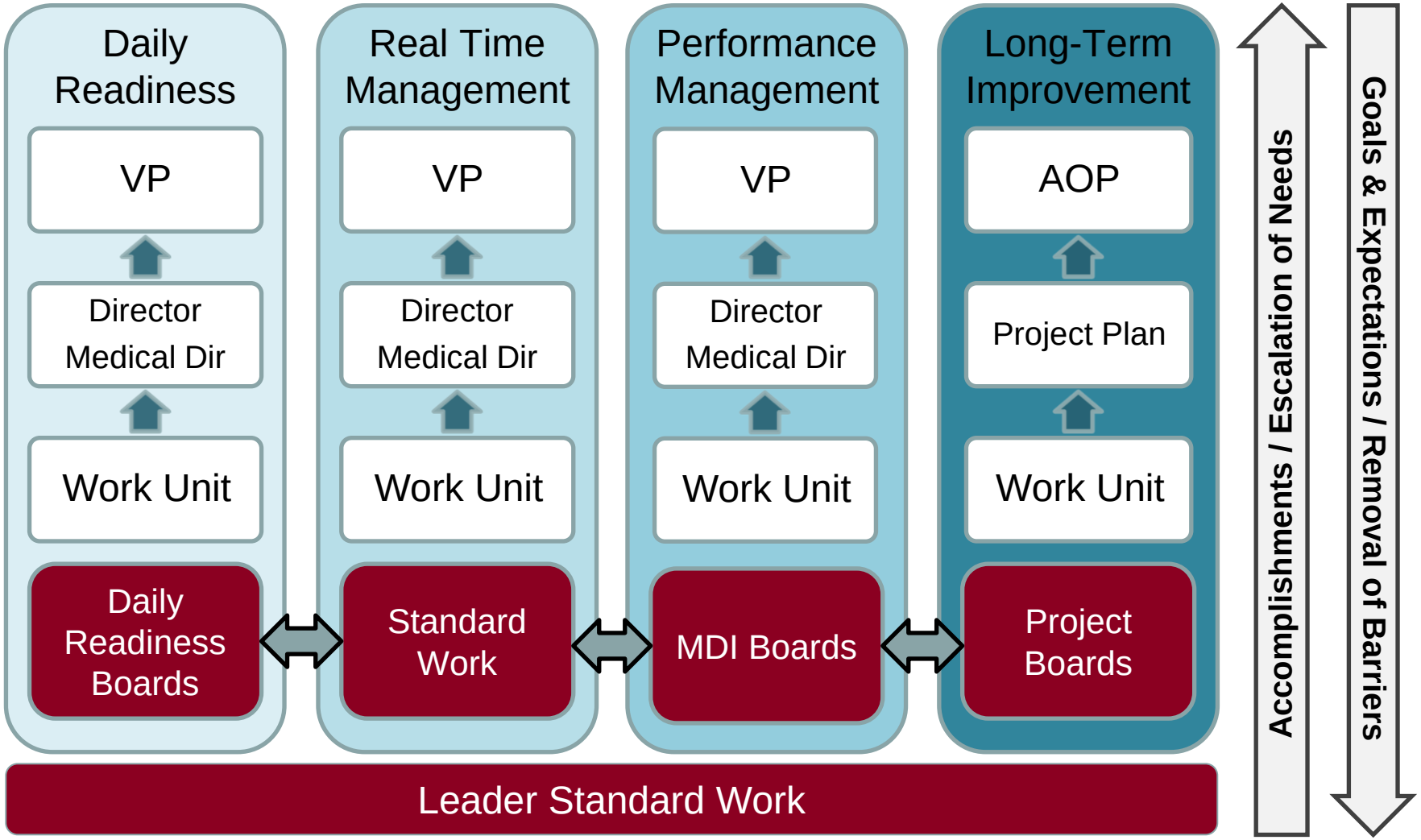
How We Do It - Managing for Daily Improvement (MDI)



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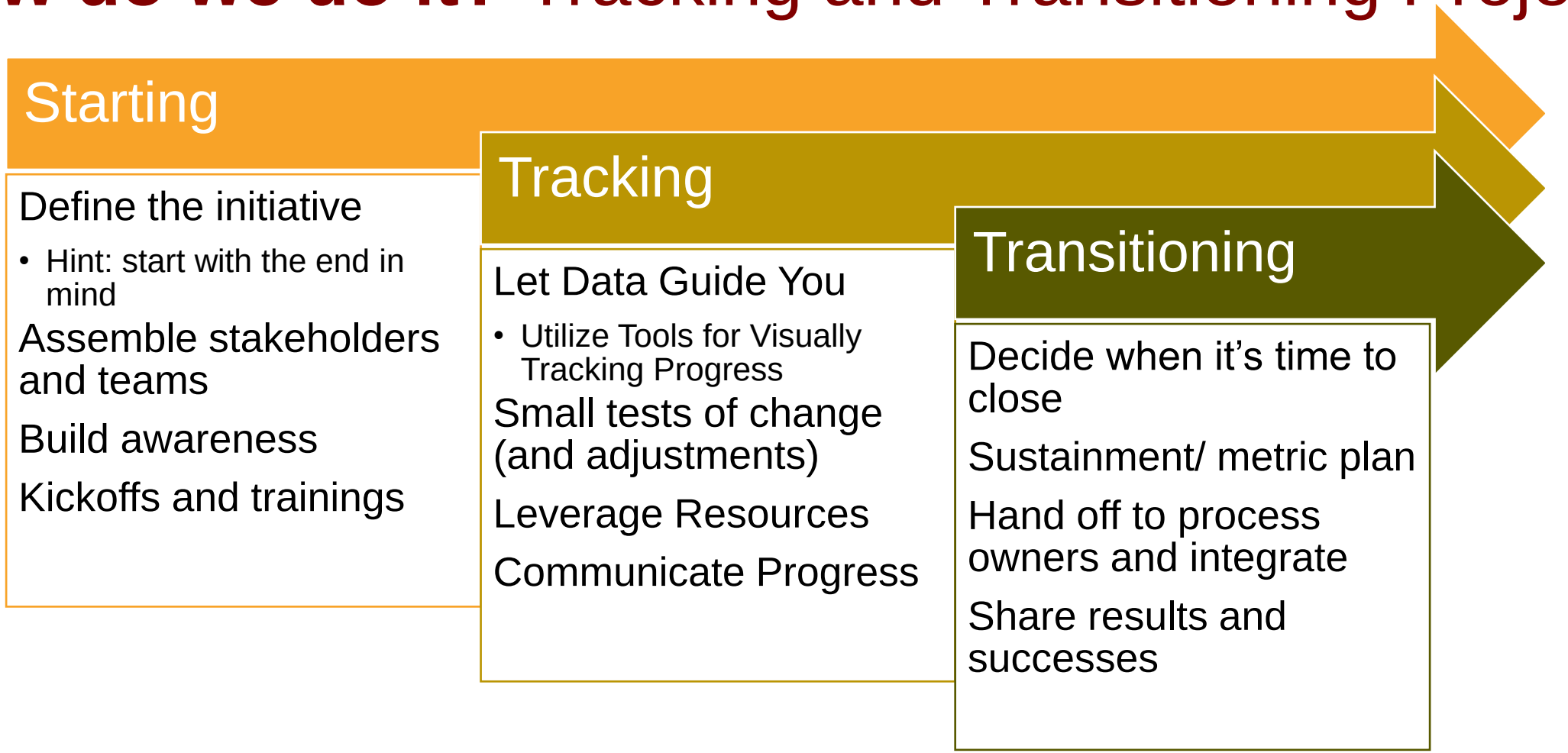
During change, engage stakeholders through the following activities:

	Core/Project Team	Managers	Employees
Start-Up	Select and prepare team	Create sponsorship model	Create awareness
Design	Execute work plans	Involve sponsors	Engage employees
Implementation	Transfer ownership	Coach sponsors	Train employees

Adapted from PROSCI Best Practices in Change Management 11th Edition, p. E23

How do we do it? Tracking and Transitioning Projects