Agenda

- Welcome and introductions
- Program overview and framework
- Program design and expectations
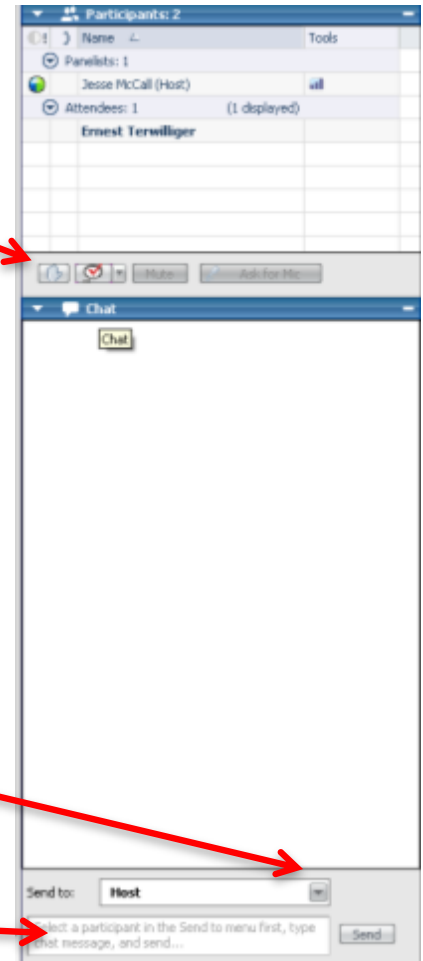- Q&A
- Logistics and closing

WebEx quick reference

- Please use chat to "All Participants" for questions
- For technology issues only, please chat to "Host"
- WebEx Technical Support: 866-569-3239
- Dial-in Info: Communicate, Join Teleconference (in menu)

Raise your hand

Select Chat recipient
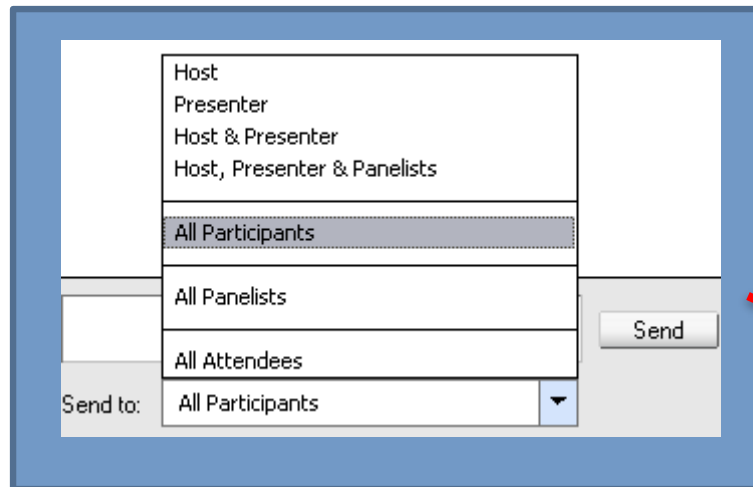
Enter Text

When chatting…

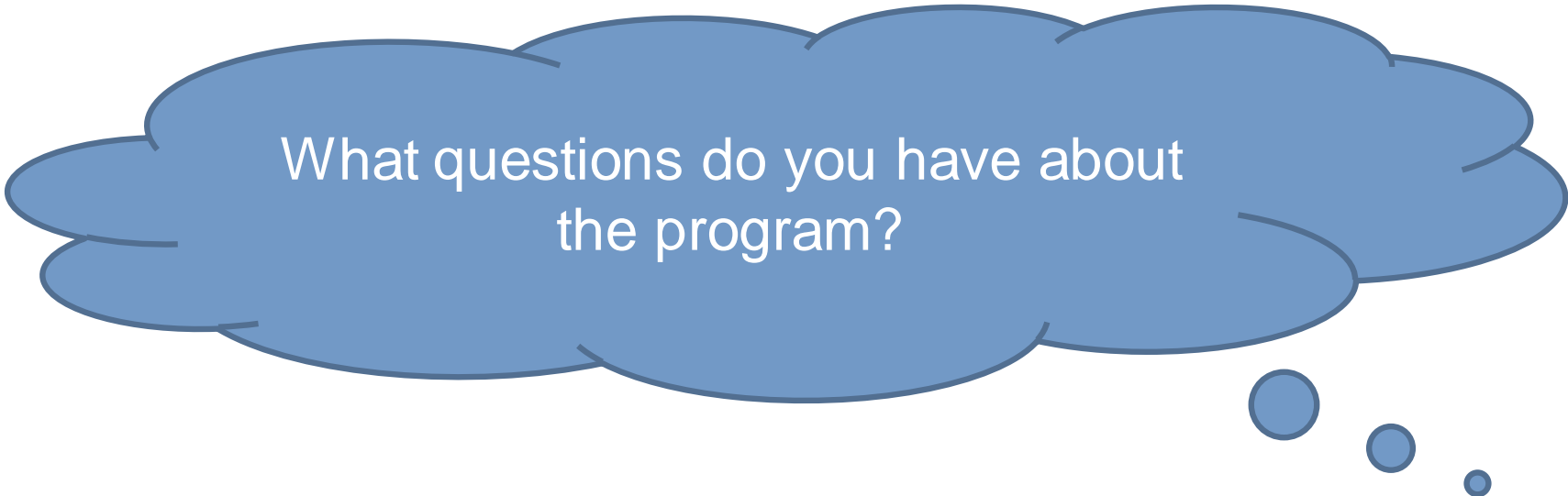Please send your message to
All Participants

Please mute your line

- Please keep your line on mute when you are speaking to minimize background noise
- You can mute or unmute using *6 on your phone

Please type your name and the organization you represent in the chat box!

Example: Doug Jones, Midwest Health System

What questions do you have about the program?

IHI Faculty: Phyllis Virgil

Phyllis M. Virgil, MHA, CSSBB, specializes in helping individuals, teams, and organizations achieve higher levels of success, satisfaction, and savings. Frustrated by unproductive meetings, Phyllis became a leading expert in creating "meeting magic" by using a time-tested Deming based framework that transforms team meetings into times of synergy and success. She started her career in healthcare quality as a strategic planner at Hospital Corporation of America. Phyllis trained with Dr. W. Edwards Deming and has worked closely with several of Deming's collaborators. In addition, Phyllis co-founded two of the nation's first quality improvement (QI) consulting and training groups dedicated to health care. She now serves as an Improvement Advisor for the Institute of Healthcare Improvement as well as for other clients.

Phyllis has coached hundreds of professionals in leading and facilitating teams and loves the joys and challenges of teamwork. She is certified as a Lean Six Sigma Black Belt by ASQ and serves as a regional and national judge for ASQ's International Team Excellence Award.

IHI Faculty: Bill Peters

William Peters is an improvement sciences expert who specializes in quality, service, and financial improvement. He guides health care leaders who recognize the upcoming demands CMS is continually making to transition from a payer model based on volume (fee-for-service) to one based on value (quality and cost). Mr. Peters speaks at public events, provides education, and facilitates improvement teams and is a long-standing practitioner of "IHI QI" as a method to help hospitals, nursing homes, physician practices, and public health initiatives increase the rate at which they make improvements. He is an Institute for Healthcare Improvement trained Improvement Advisor and serves as IHI faculty on both domestic and international projects. Mr. Peters also occasionally writes for *Quality Digest* magazine and is an expert in the creation of organizational dashboards and teaching statistical process control (run and control charts).He has two beautiful children; Byron 14 and Avery 10. His better half Jessica is a school psychologist who pretty much does the same kind of job but in an elementary school setting.

IHI Faculty: Karen Baldoza

Karen Baldoza, MSW, Executive Director, Institute for Healthcare Improvement (IHI), is co-lead of IHI's Improvement Capability Focus Area. As a trained Improvement Advisor and Lean Facilitator, she also leads and coaches staff in improvement within IHI. Previously, Karen was Operations Director for the continuum of care portfolio, and also managed relationships with strategic partners and several large strategic initiatives. Prior to joining IHI in 2000, she worked for the Commonwealth of Massachusetts as an Assistant Director in the Executive Office of Elder Affairs, and in public health prevention and policy efforts. Karen received her Master of Social Work degree from Boston College, focusing on community organizing, social policy and planning, and not-for-profit administration.

IHI Faculty: Christina Gunther-Murphy

Christina Gunther-Murphy, MBA, is an Executive Director at the Institute for Healthcare Improvement (IHI) and oversees IHI's work on person-centered care. In this role, she is responsible for designing and executing the overall portfolio strategy, acting as a spokesperson, shepherding the evolution of content, directing results-oriented initiatives, and contributing to the design of large-scale initiatives. She also acts as the Executive Lead for IHI's internal work on Operational Excellence, including the design and development of IHI's quality improvement infrastructure. Previously, Ms. Gunther-Murphy oversaw operations for IHI's hospital portfolio, managed key internal transitions, and led internal improvement efforts. She has experience in spread and scale-up as the manager of IHI's 5 Million Lives Campaign and advisor for a number of large-scale change programs in the US and internationally, including the 100,000 Homes Campaign. Ms. Gunther-Murphy is a trained Improvement Advisor and has more than 10 years of experience in health care improvement. Prior to joining IHI, she worked at the National Initiative for Children's Healthcare Quality (NICHQ), where she directed a national initiative focused on providing optimal care to prevent, identify, and treat childhood obesity. She holds a Master's in Business Administration from MIT's Sloan School of Management.

IHI Staff: Mark Bradshaw
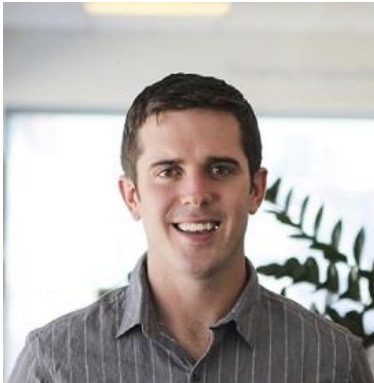
Mark Bradshaw, Event Coordinator at the Institute for Healthcare Improvement. Mark supports events and projects with the Improvement Capability team. Previous to IHI, Mark attended Suffolk University where he majored in both Political Science and Philosophy.

The aim of this program is to…

Further develop your improvement knowledge and skill so you can coach and facilitate improvement teams as well as support the implementation of improvement strategies throughout your organization.
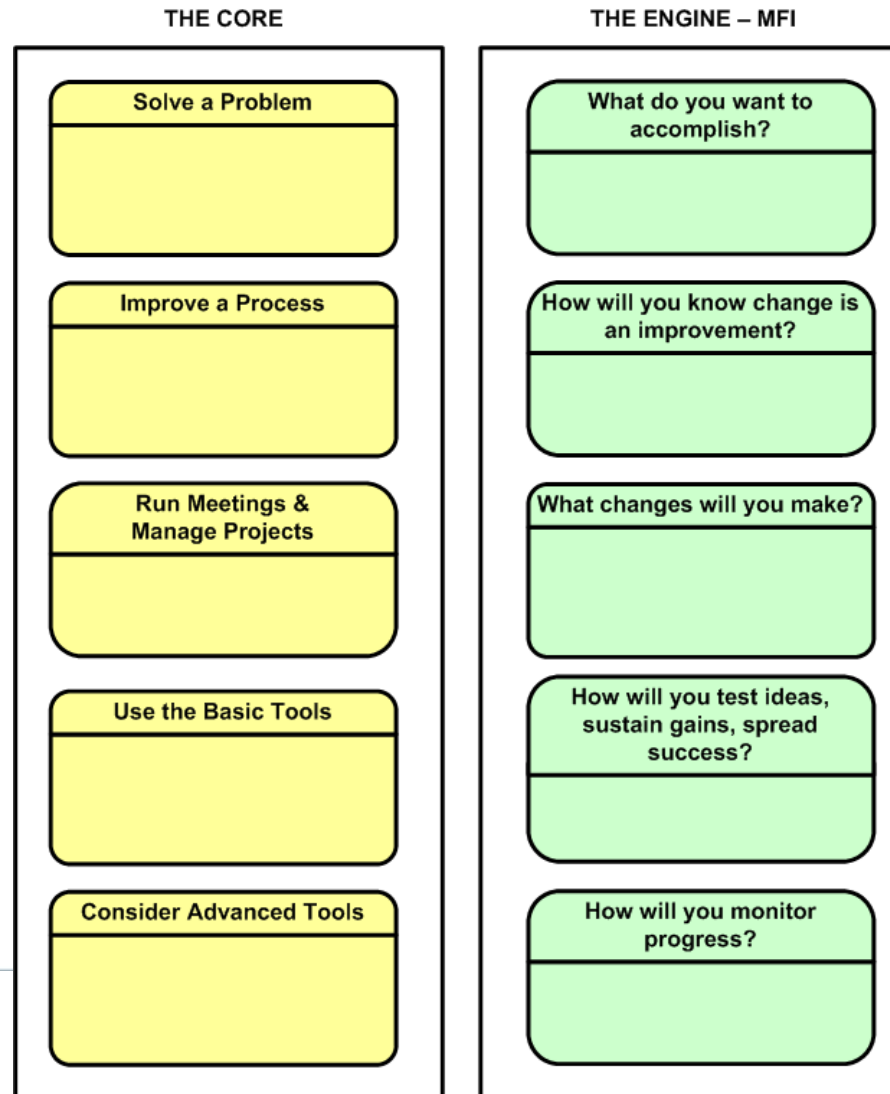
This program is designed to help you…

- Understand the science of improvement and use the Model for Improvement as a roadmap for improvement projects

- Coach improvement teams on how to develop, test, and implement changes including identifying high-leverage change ideas and testing them using PDSA cycles

- Become skilled in how to use data for improvement and other key quality improvement tools

- Build skills in team facilitation, communication, decision making, and understanding team culture

- Apply just-in-time teaching of improvement skills to team members in order to advance the team's work

- Leave with a specific plan for how you will continue coaching your team and prepare yourself to coach subsequent teams

- Learn concepts of implementation, sustainability, and scale-up

Curriculum framework: The CORE & ENGINE

THE CORE

THE ENGINE – MFI

THE CORE	THE ENGINE – MFI
Solve a Problem	**What do you want to accomplish?**
Improve a Process	**How will you know change is an improvement?**
Run Meetings & Manage Projects	**What changes will you make?**
Use the Basic Tools	**How will you test ideas, sustain gains, spread success?**
Consider Advanced Tools	**How will you monitor progress?**

Curriculum framework: The BUILDING BLOCKS

QI Context and History	Aim / Constancy of Purpose
Systems / Process Thinking	**Theory of Knowledge PDSA Thinking**
Understanding Variation & Statistical Thinking	**Understanding People & Working with Teams**
Measurement for Improvement	Customer Mindedness
Change Ideas	Project Leadership

Curriculum framework

THE BUILDING BLOCKS

QI Context and History	Aim / Constancy of Purpose

Systems / Process Thinking	Theory of Knowledge PDSA Thinking

Understanding Variation & Statistical Thinking	Understanding People & Working with Teams

Measurement for Improvement	Customer Mindedness

Change Ideas	Project Leadership

THE CORE

- Solve a Problem
- Improve a Process
- Run Meetings & Manage Projects
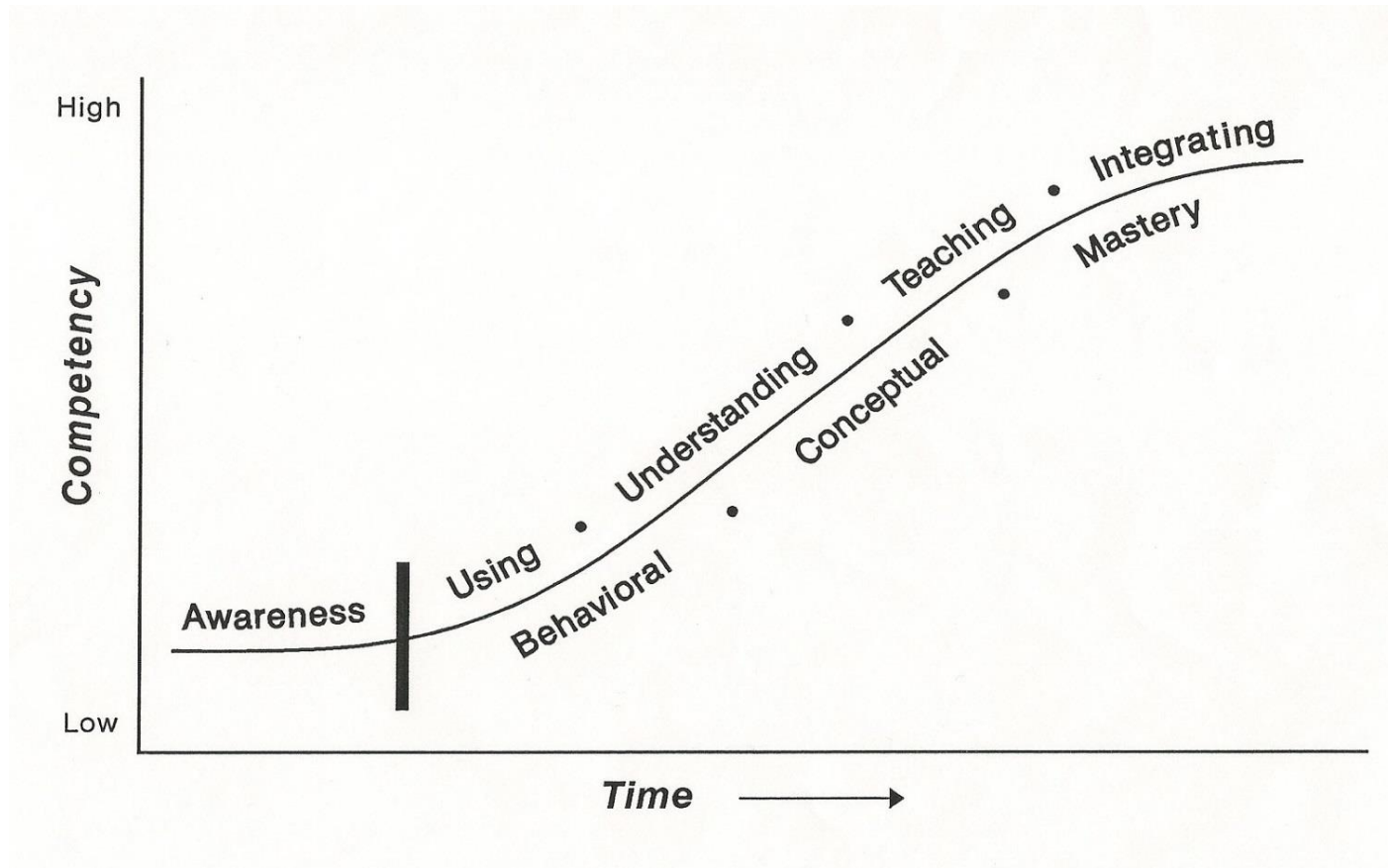- Use the Basic Tools
- Consider Advanced Tools

THE ENGINE – MFI

- What do you want to accomplish?
- How will you know change is an improvement?
- What changes will you make?
- How will you test ideas, sustain gains, spread success?
- How will you monitor progress?
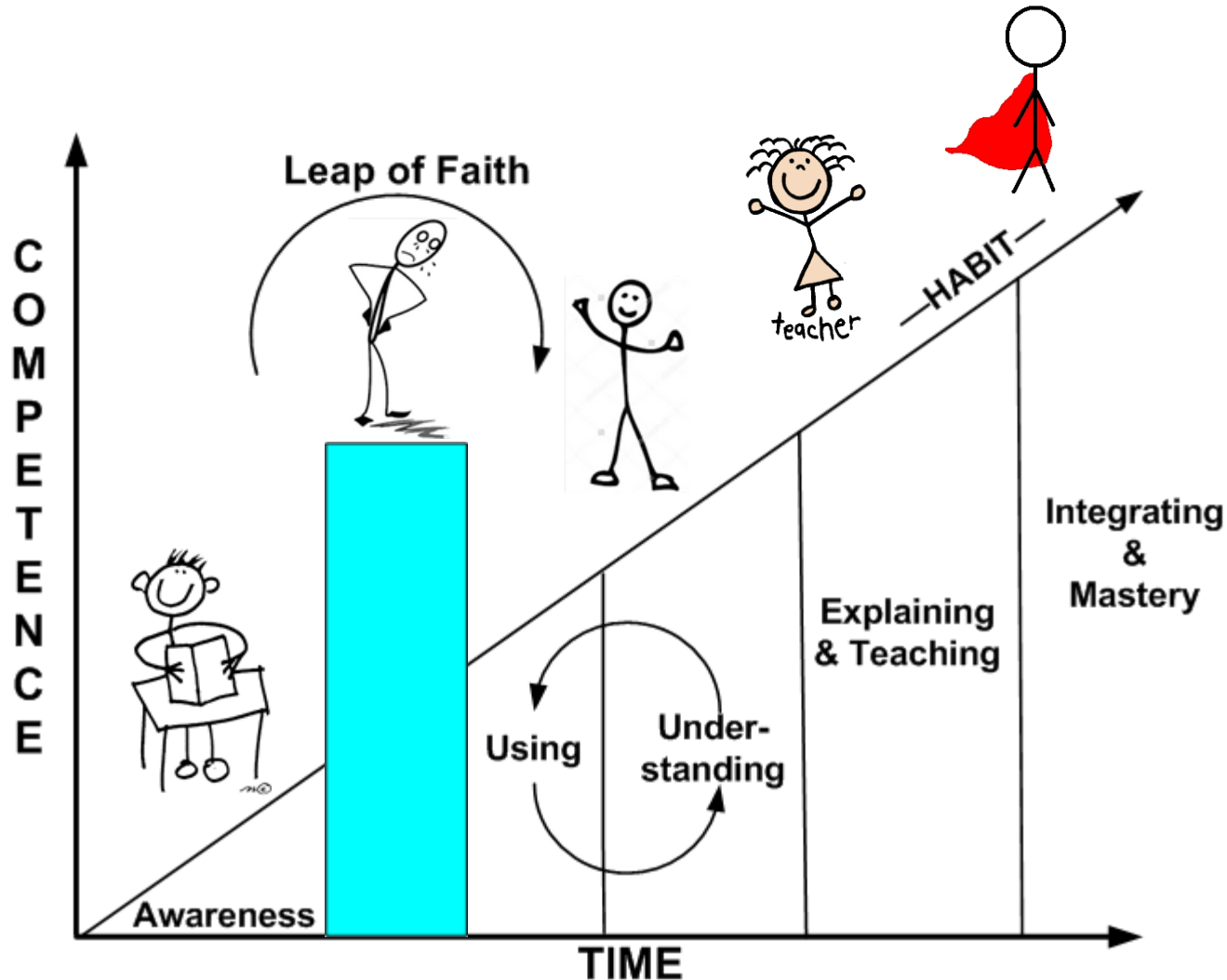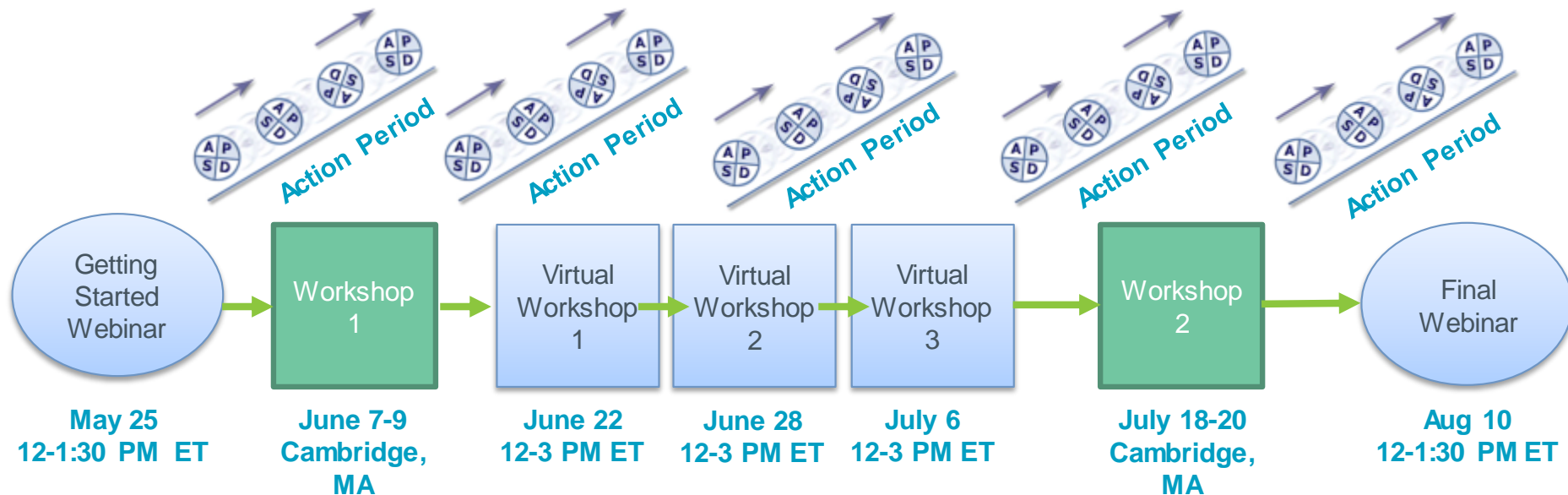
Building Competency as a Coach

The Learning Curve

Building Competency the _Real_ Story

Program design and key dates

Getting Started Webinar
May 25
12-1:30 PM ET

Workshop 1
June 7-9
Cambridge, MA

Virtual Workshop 1
June 22
12-3 PM ET

Virtual Workshop 2
June 28
12-3 PM ET

Virtual Workshop 3
July 6
12-3 PM ET

Workshop 2
July 18-20
Cambridge, MA

Final Webinar
Aug 10
12-1:30 PM ET

Support

IHI.org   Email distribution list   Faculty consults

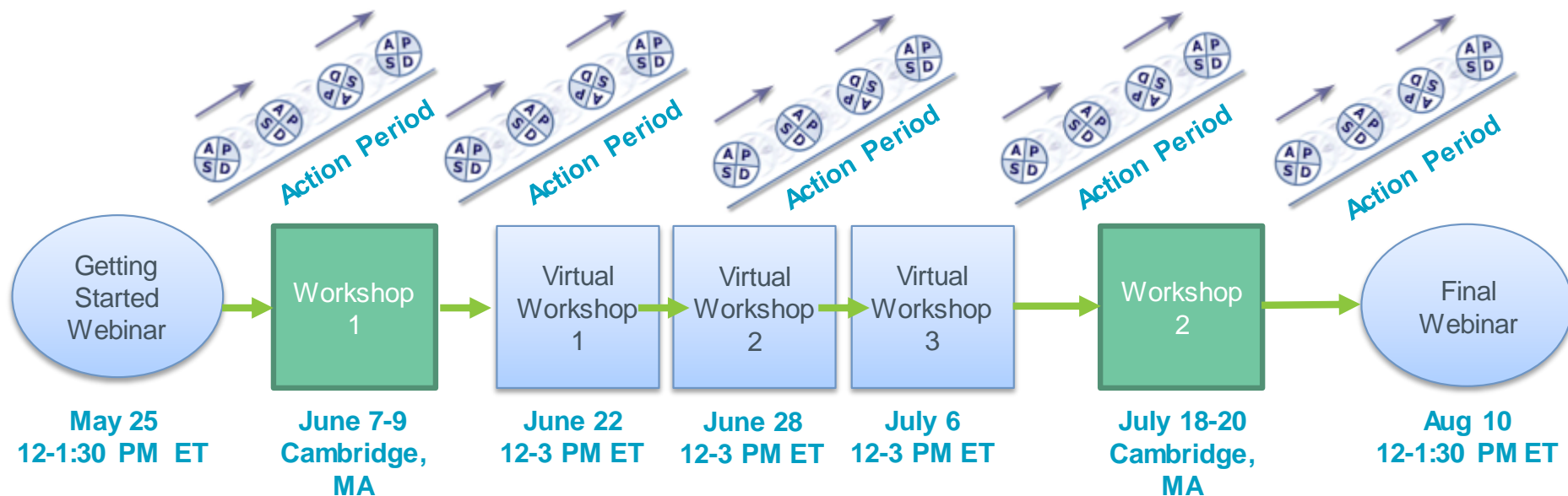Coaching feedback from fellow coaches and faculty

Expectations

- A team with an improvement project to coach – essential for successful learning!

- Knowledge of and previous experience applying quality improvement concepts, methods, and tools

- Ready to take the next step and coach improvement teams

- Conduct preparatory exercise and bring results to first workshop

- Attend both three-day, in-person workshops

- Participate in five virtual workshops/webinars

- Commit to working with your team immediately following the sessions – *we learn by doing*

- Willingness to share your work and coaching with the rest of the participants – *all teach, all learn*

Workshop 1 overview

Day 1	Day 2	Day 3
• Let's get started! • What is quality improvement? • What are we trying to accomplish? Establishing aim statements	• How will we know that a change is an improvement? • The why, what, and how of data for improvement • Appreciating variation • Creating, interpreting, and coaching on run charts	• How will we test our change ideas? • Running real PDSA cycles • PDSA exercise • Planning and coaching PDSA cycles • A case study
Lunch		
• Building your team: First things • What do we want to accomplish? A deeper dive • Running meetings & making decisions - Part 1	• Running meetings and making decisions - Part 2 • What changes can we make that will result in improvement? • Developing change ideas • Selecting change ideas	• Facilitation – Part 1 • Teamwork and communication: Understanding working styles • A case study • Tying it all together
Adjourn		

Program design and key dates

Getting Started Webinar	Workshop 1	Virtual Workshop 1	Virtual Workshop 2	Virtual Workshop 3	Workshop 2	Final Webinar
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Action Period

Model for Improvement
What are we trying to accomplish?
How will we know that a change is an improvement?
What change can we make that will result in improvement?

Act Plan
Study Do

Support

IHI.org   **Email distribution list**   **Faculty consults**

Coaching feedback from fellow coaches and faculty
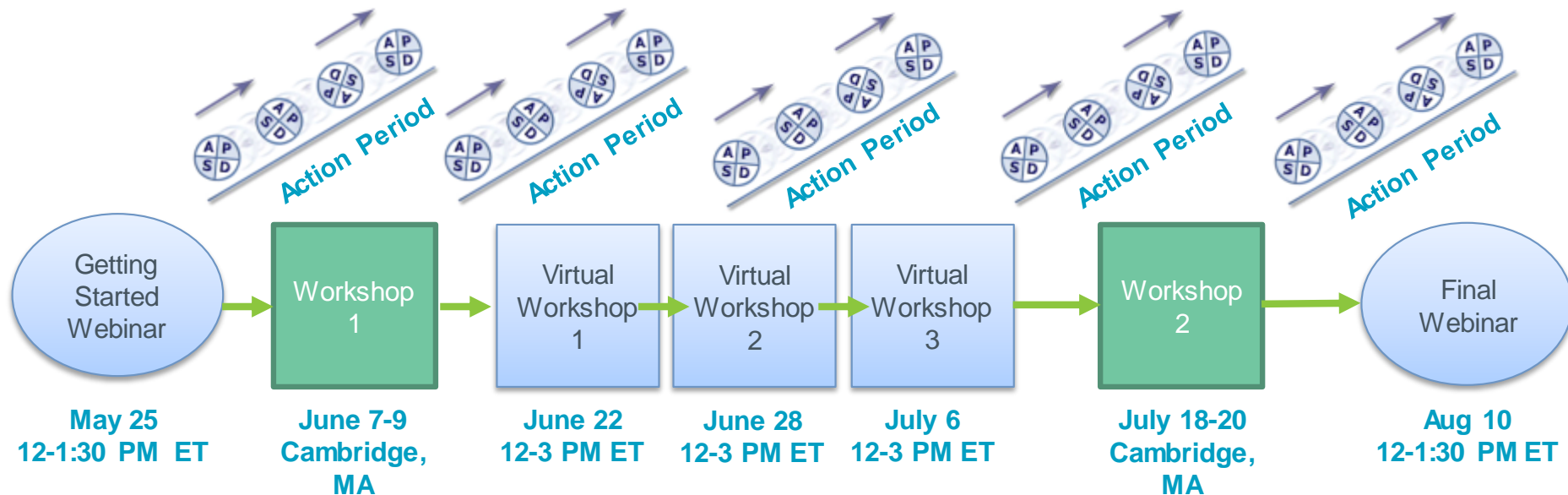
Workshop 2 overview

Day 1	Day 2	Day 3
• A deeper dive: Measurement and run chart coaching • Developing change ideas: 　• Creativity overview 　• Six thinking hats	• One-on-one leadership coaching • Developing change ideas: Change packages • Breakouts: WIP presentations round 2	• Breakouts: WIP presentations round 3 • The long-term impact of improvement: Implementation, sustainability, and scale-up
Lunch		
• Facilitation - Part 2 • Breakouts: Works in Progress (WIP) presentations round 1 • Control charts: An overview	• The art of coaching: Coaching practice round 1 breakouts • Visual displays of data • Open space	• The art of coaching: Coaching practice round 2 breakouts • Graduation!
Adjourn		

Program design and key dates

| Getting Started Webinar | Workshop 1 | Virtual Workshop 1 | Virtual Workshop 2 | Virtual Workshop 3 | Workshop 2 | Final Webinar |

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Model for Improvement
What are we trying to accomplish?
How will we know that a change is an improvement?
What change can we make that will result in improvement?

Act Plan
Study Do

Support

IHI.org　　　　**Email distribution list**　　　　**Faculty consults**

Coaching feedback from fellow coaches and faculty

Questions?

Program logistics

- Workshops 1 and 2 will take place at the Institute for Healthcare Improvement (Cambridge, MA)

- Room block available at local hotel for both workshops

- Continuing education credits available for nurses, pharmacists, and physicians

- Enrollment fees:
  - Regular rate: $5,995 per person
  - Group rate: $5,096 per person (3 or more people)
  - Discounts and scholarships available

Program logistics

- For more information, go to:
  http://www.ihi.org/education/InPersonTraining/ImprovementCoach/Improvement-Coach/Pages/default.aspx

- Click here to enroll:
  http://app.ihi.org/events/SelectAttendee.aspx?New=1&EventId=2975

Improvement Coach

Begins May 25

Contact Caitlin!

Contact IHI team member **Caitlin Littlefield** (*left*) at 617-301-4800 or <u>clittlefield@ihi.org</u> to learn more and enroll for the Improvement Coach Professional Development Program.

ihi.org/ImprovementCoach

We hope you will join us!

Appendix

- *More on Projects*
- *IHI's Improvement Coach and Improvement Advisor Professional Development Programs Side-by-Side*

Project selection

- The team's project and its results should be important for your organization (unit/department for this smaller scope) and have a good chance of success
- The project is clearly a:
    - Process (where you can identify the boundaries) and it's not currently undergoing changes already
    - Problem that is linked to a process
- Smaller scope – can test and see results during the program
- Potential measures have been identified, and data can be collected daily (weekly, if necessary)
- The project has a sponsor who can help guide and monitor the project and remove barriers to improvement
- The team or team's sponsor has control over the systems, processes, products, or organizations where the anticipated changes must be made
- Improvement team members are available and eager to learn
- The process owner is able and willing to be the team leader and work with you in and between team meetings

Criteria	Additional Details	Your Score (1 – 5) Note: A score of 5 indicates strong agreement with this criteria while a score of 1 indicates little to no agreement with this criteria.
Availability of team	• Project team includes 3 to 5 people • Team able to meet frequently enough to apply learning • Leaders willing to give Improvement Coach dedicated time to work on project	
Authority of team	• Team able to make changes without permission • Process owner able and willing to lead team	
Willingness of team	• Team eager to learn and willing to participate • Process owner willing to work with Improvement Coach	
Type of project	• Project is improvement of a process • Process is not already undergoing major change • Project is in its infancy or has not started yet • Data for process already exists	
Scope of project	• Project could be completed over the course of 3 to 6 months • Project has a high likelihood of success • Key measures of success have already been defined	
Energy and interest	• Improvement Coach finds project interesting and engaging • Organization finds project of benefit to overall strategy	

Examples of appropriate projects

- Improve a process that produces good results most of the time but occasionally results in errors or problems
- Identify a process that better matches and meets a patient or family need, even if patients or families have not expressly asked for it
- Identify and improve processes, products, and services by making fundamental changes even though the output is currently not considered a problem, in order to deliver even better outcomes in the future
- Improve a product, process, or service today, which will put us in a better competitive position
- Fix a recent or recurring problem that all agree needs to be fixed to put a process back (restore) to the level it was designed to perform or to exceed expected performance

Not good candidates for a project

- Developing a measurement system
- Fixing a transient problem or emergency
- Implementing inspections/reviews to prevent errors from reaching the patient/customer
- Improving employee compensation
- Implementing a one-time or infrequent training or educational workshops
- Area of focus currently undergoing major changes already
- Any project where you expect an IT or training solution
- Any project where you cannot answer the question "How will I know a change is an improvement?"
- No leadership support or outside the sponsor's control or influence
- Huge ("solving world hunger") projects with short timeframes
- Politically charged issues

Examples of past participants' teams' improvement projects

- Reducing pressure ulcers; Visual cues for bedside staff in pediatric pressure ulcer prevention
- Reducing resident falls at Hospital A
- Emergency department utilization at Medical Center B with patients
- Improving emergency department care of patient's with DVT/PE
- Improving follow-up post hospital stay
- Improving diabetes outcomes
- Increasing access to behavioral health
- Reducing the number of days to schedule an appointment for surgery
- Decreasing wait time for cancer patients seeking overnight lodging
- Patient-centered design: Reducing paperwork for patients (and increasing patient and provider work flow and satisfaction)
- Improving adherence to new guidelines
- Reducing appointment "no-shows"
- Improving medical screening process; Increasing screening rate for social needs in an ambulatory clinic
- Improving hydration on an elderly ward
- Increasing community resident attendance in fitness programs
- Increasing student asthma medications in school nurse's office
- Reducing parental complaints regarding homework
- Improving housing placements; Improving rapid re-housing

IHI's Improvement Coach and Improvement Advisor Programs

	Improvement Coach	Improvement Advisor
Audience	Those seeking to incorporate improvement into daily work area/responsibilities and coach improvement teams	Those who are or are becoming improvement professionals
Scope	Unit/department level	Organization-wide
Time spent in improvement role and responsibility	25-50% to support and facilitate organizational improvement strategies	Nearly 100% to accomplish organizational improvement strategies
Program application	Coach a team running an improvement project (small-medium scope)	Lead a strategic improvement project
Program length	3-4 months	11-12 months
Program workshops	2 (3 days each)	3 (4 days each)
Program webinars	5	13
Audience experience level	Competent-Proficient	Proficient-Expert
Price	$5,995/person (regular rate)	$16,200/person (regular rate)