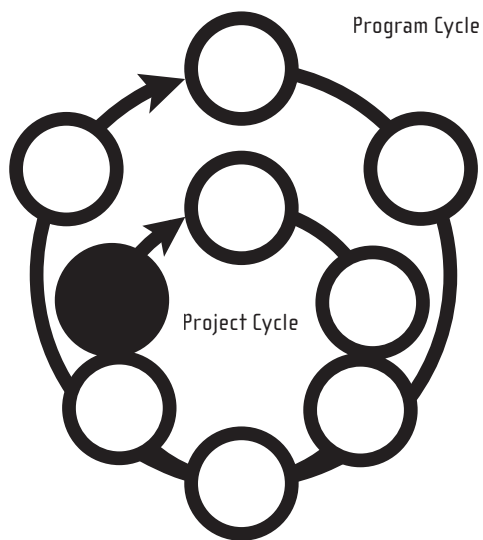


## Project Step 6: Systematize Changes.



### The Big Picture

Without a concerted effort to incorporate project changes into daily work procedures, the gains for which team members have invested significant time and resources are likely to recede over time. During this step, team members plan how to integrate their project improvements in daily routines and how to best sustain those improvements. They also evaluate how effectively the team performed in achieving the project goals.

### What To Do

- Sustain improvements.
- Assess team effectiveness.



## Snapshot of HIV Care

### Creating Quality By Spreading And Integrating Change

Creating quality by implementing the successful changes is challenging. Resistance to change, no matter how small, should be anticipated by the quality committee. The quality committee can mitigate this resistance through a variety of techniques—from providing staff training and education about the change, providing continuous feedback and support to staff, standardizing the practice, to providing incentives to best performers or “champions of the change.”

### Spreading Quality Improvement Throughout The Facility

Quality improvement activities have been sustained at SUNY Downstate in Brooklyn, NY according to Kristina Brown, Quality Improvement Coordinator, because quality management is incorporated into the staff’s routine schedule. At the monthly, regularly scheduled committee meetings, “everyone has to be prepared to discuss whether they’ve worked on PDSA cycles, what’s worked and what hasn’t worked.”



## Snapshot of HIV Care...*Continued*

Deadlines also help keep staff focused—“everyone knows that by the 15th of the month, data have to go to the data collection person.” Quality management is also on the agenda of every staff meeting and there’s a scheduled quarterly presentation of the performance measurement data so everyone knows “how we’re doing, where we need to improve, and what we need to focus on in the next quarter.”

Brown believes that having this structure has been the key to successfully sustaining change. “There’s no month when quality improvement isn’t being addressed, even during those times when too many other things are going on. There’s no let up.”

Quality improvement has to be incorporated into facility’s routines, with leadership support. “If you let it go and consistency and accountability is not there, then all of the work you’ve done will quickly go by the wayside,” concludes Brown.

### Don’t Rely On One Person To Sustain The Quality Program

One of the challenges facing quality programs, according to quality consultants, is the over-reliance of a facility’s efforts on one person. All too often, facility’s success with quality management has been do to hard and sustained work of one or a small group of committed staff. “If these driving forces leave the facility, or take on new duties, then the quality management program can fall apart. Leadership need to continuously ensure that the quality management program can be sustained through routine staff changes,” cautions a quality consultant.

“Quality, like other services and functions, can’t be the responsibility of only one person. The institution must support quality by integrating it into all staff functions such as training, communications, job descriptions, and employee evaluations.”

While leadership is crucial to establishing, implementing and maintaining quality efforts at a facility, leaders also need to recognize their appropriate role. A quality manager reports that the founding physician at her facility, while expressing support for the quality management program, was undermining its impact because he continued to make changes at the agency on his own and ignored the stated role of the quality committee.

“It was difficult for the staff to challenge him because he was the boss. Finally, during our annual quality management plan review that we were able to reach an agreement with him that he would use the quality committee to test and make changes. Unfortunately, had lost time and spent valuable resources because we spent a lot of time focusing on this problem, rather than on quality issues.”

# Sustain Improvements.

Every improvement project reaches an end point. Before the team completes its project work it is important to take the time to systematize the changes the team has meticulously tested and implemented. The goal is to institutionalize successful improvements so that they become the new 'status quo' and that the gains are sustained over time.

The project team members who are most familiar with the processes and the facilities quality committee plan should work together on identifying how to sustain the new level of performance. Have a written action plan for systematizing and sustaining the improvements. The identified strategies are integrated into the overall quality management plan and annual workplan.

The following elements are helpful to maintain long-term effects of implemented gains:

- Re-measure performance level
- Educate staff to support improvements
- Identify a champion of change
- Ensure ownership of change
- Institutionalize changes



The Toolbox on page 137 shows a template for an action plan that may be used to document steps and timelines.

## Re-measure Performance Level

The process that has been improved by the quality improvement team should be re-measured routinely to ensure that gains have been kept on time. A timetable for the re-collection of data (quarterly or bi-annually) should be created including a designating staff responsible for data collection and to whom the findings will be reported. The re-measurement of data should be integrated into the facility's quality program and become part of the routine performance measurement process. The team should also decide on any necessary thresholds to trigger the attention of the quality committee or to reconvene the improvement team.



## Additional Resource

For guidance in teaching small groups about the tasks required to sustain quality gains, see the HIVQUAL Group Learning Guide "Systematize Improvements" exercise. You can download this publication at [www.hivqual.org](http://www.hivqual.org).



## Toolbox:

### Action Plan for Systematizing Improvements

Improvement Goal: Increase Annual Mental Health (MH) Screening for all HIV-infected Patients to 65% and Sustain Performance Level.

STRATEGY	TASK	NEXT STEPS	TIMELINE
Re-measure performance level	Re-measure existing indicator	<ul style="list-style-type: none"> <li>Decide at next meeting on frequency of review</li> <li>Work with MIS department to automate MH report</li> </ul>	April '06
Educate staff to support improvements	Educate providers using the new MH screening form	<ul style="list-style-type: none"> <li>Invite outside speaker on this topic</li> <li>Arrange routine case conferences on specific cases</li> <li>Provide orientation to staff</li> </ul>	May '06
Identify a champion of change	Identify staff person to lead MH screening efforts	<ul style="list-style-type: none"> <li>Formalize John as lead to sustain gains</li> <li>Send John to conference on this topic</li> </ul>	April '06
Ensure ownership of change	Inform staff about the MH screening tool	<ul style="list-style-type: none"> <li>Explain the role of staff in the new process</li> <li>Showcase new tool and process on poster</li> </ul>	May '06
Institutionalize change	Systematize MH screening tool into the fabric of the clinic	<ul style="list-style-type: none"> <li>Review and revise all policies to integrate MH screening in job descriptions</li> <li>Provide training on MH screening process during new employee orientation</li> </ul>	April '06

## Educate Staff To Support Improvements

Some level of training will be necessary to ensure that staff understands new tools and process changes, as well as their new roles and responsibilities in implementing the planned improvements. The specific nature of the quality improvement will dictate the type of training that is appropriate. For example, a printed worksheet of instructions or a laminated checklist hung near a workstation may suffice. Improvements that require more critical knowledge-based tasks or complex skills may require training incorporating some degree of problem-solving and decision-making. At a fundamental level, all staff involved in the improvement should receive consistent information.

## Identify A Champion Of Change

A staff person who has intimate knowledge of the improvements is identified to become the internal champion of change. Staff or consumers can contact the person to ask follow-up questions or clarify certain details. This champion becomes the ‘human face’ of the new status quo and a visual reminder to sustain changes.



### Real-World Tip Plan To Promote Quality Gains.

Concerted efforts are required to ensure gains achieved during quality improvement projects are sustained. The following tips can help sustain quality improvement gains:

- Assign one member of the improvement project team to monitor progress and routinely report back to the quality committee.
- Assign specific performance thresholds to trigger follow-up activities.
- Decide on a simple format that can be used to generate an on-going status report for the quality committee, staff and consumers.
- Provide simple incentives such as letters of recognition or small monetary incentives (e.g., gift cards or movie passes) to staff that support improvements.
- Highlight the advantages of the new process whenever possible.

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## Ensure Ownership Of Changes

Steps taken to ensure the ownership of changes help make the improvement ‘part of the fabric’ of the HIV facility. Every opportunity is used to promote the new status quo to the entire staff either at staff meetings, through storyboards in hallways or in mini-presentations. Changes are also clearly communicated to new staff members to integrate these improvements in their daily work. These activities send a clear message that quality activities are everyone’s responsibility to keep the momentum of change going.

## Institutionalization Of Changes

Finally, the project team reviews and revises, if necessary, the HIV program’s policies and procedures to ensure that new processes are documented. The team may also consider screening involved job descriptions and making appropriate changes. The process of sustaining the project gains is clearly communicated to the facility’s leaders and key stakeholders. System-wide buy-in also helps to overcome staff resistance and barriers in the implementation process. For more information on sustaining the quality program momentum, please see Program Step III on page 69.

# Assess Team Effectiveness.

A team self-evaluation is the team's final task. A team looks at lessons learned throughout the improvement project and identifies how future team efforts could be more effective and efficient in their efforts.

## Evaluating team performance

Taking time to evaluate the improvement team's performance will identify key learnings from the project. Team members can discuss the positive aspects of their group interactions along with the areas that need improvement. In this way, current project teams 'sow the seeds' for the success of future improvement teams. Evaluation also signals the end of an improvement project and provides a sense of closure for team members.



The Toolbox on page 141 provides two approaches to self-evaluation. Results of the team evaluation should be written up and shared with the overall quality committee and future project teams. How the quality committee should proceed and evaluate the project team performance is described in Program Step III on page 69.

## Celebrate success

At this point it is important to celebrate the accomplishment of the project team. It stresses the significance of quality to the facility and creates some tangible excitement about successful changes. The quality committee can use this opportunity for staff recognition and announcements of future quality projects.



### Real-World Tip End Well.

Every improvement project reaches an end point. Here are some suggestions to promote closure:

- Celebrate successes with a 'lunch party.'
- Get leaders to acknowledge the hard work by the team.
- Identify a spokesperson for the team who will present on the behalf of the team.
- Summarize and archive the team's efforts before the memories fade.
- Promote the successes of this team to future team members.



## Additional Resource

For guidance in teaching small groups about the importance of post-improvement project team evaluation, see the HIVQUAL Group Learning Guide "Team Self Evaluation" exercise. You can download this publication at [www.hivqual.org](http://www.hivqual.org).



## Toolbox:

### Team Self-Evaluation Approaches

#### Method One

Write the following three questions about team effectiveness on flip chart paper and ask each team members to answer them from their own perspective:

- What worked well in the team?
- What needed to be improved?
- What do you suggest to improve future quality improvement teams?

#### Method Two

Add categories to brainstorm under each of the above questions to ensure that feedback is given on certain categories of experience, such as:

- Team composition and roles
- Project improvement process (e.g., goals, understanding of the process and problems, pilot tests)
- Length of time and resource allocation
- Program/organizational support
- Teamwork and distribution of tasks