

Selecting a Pilot Test

Participant training objectives:

- To understand the purpose of selection criteria in evaluating a potential pilot test
- To know how to choose a pilot test that is most likely to succeed

Target audience:

QI team members involved in the pilot test implementation phase of quality improvement projects

Type of exercise:

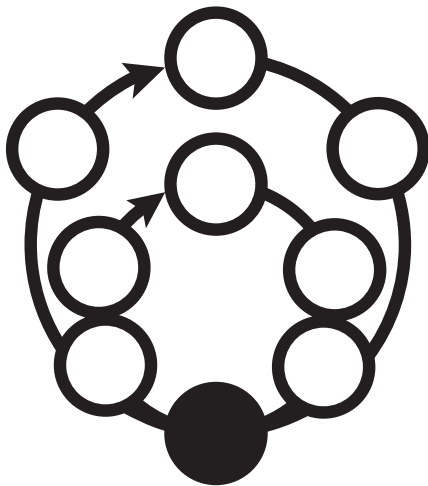
Scenario; group exercise, 60 minutes

Key concepts:

Before pilot testing, project teams should assess whether or not potential pilot tests meet the following criteria:

- Focused
- Supportable
- Immediate
- Measurable

Note: The Brainstorming Exercise should be completed before the Selecting a Pilot Test Exercise.



The Big Picture:

In the HIVQUAL model, pilot test selection occurs during Step 4 of the project cycle: Project team plans and tests change(s). During this step, a team generates potential pilot tests—improvement changes implemented on a small scale. Please note that pilot tests are discussed in greater detail in the Planning a Pilot Test Exercise.

SESSION AT-A-GLANCE	WHO	HOW LONG
1. Welcome, Learning Objectives, Agenda	Facilitator	5 minutes
2. QI Background: Basic Selection Criteria	Facilitator	10 minutes
3. Group Exercise: Scenario	Participants	30 minutes
4. Learning Transfer: Worksheet	Participants	10 minutes
5. Wrap-up	All	5 minutes
		60 minutes

Materials

For this group learning session, you will need the following materials:

- Participant handouts:
 - Scenario
 - Learning Transfer Worksheet
 - Copy of slide presentation
- Flipchart paper and markers
- Overhead projector/LCD panel (optional)
- Wipeboard/chalkboard (optional)

Preparation

To prepare for the group learning session, complete the following tasks:

Familiarize yourself with the session's structure and content:

- Read through the Group Exercise notes in their entirety, including the exercise answer key, presentation slides, and participant handouts.
- Practice the presentation outlined in the Group Exercise notes.

Photocopy the Scenario, Learning Transfer Worksheet, and slide presentation for each participant.

Prepare your presentation slides for display:

- Photocopy the slides, or write the slide content on transparencies or on flipchart paper.
- For display using an LCD panel, enter the content into a computer file.

Prepare the training room.

- Arrange the tables and chairs in a circle or square shape, if possible.
- Make sure you have plenty of flipchart paper and a marker.
- Set up and test equipment (e.g. overhead projector), if applicable.
- Make sure you have enough chalk or wipeboard markers, if applicable.

Notes

Selecting a Pilot Test: Group Exercise

Welcome and Introductions

To begin the group learning session, welcome participants and thank them for their participation. If necessary, ask individuals to introduce themselves to the group.

■ Learning Objectives

Tell participants that by the end of the session they will:

- Understand the purpose of selection criteria in evaluating a potential project pilot test
- Know how to choose a pilot test that is most likely to succeed

Agenda

Provide a brief description of the session's primary components:

- Presentation of basic selection criteria
- Group exercise on rating and selecting a pilot test
- Learning transfer worksheet to practice measuring your own pilot test against selection criteria

Quality Improvement Background

Distribute a copy of the slides to each participant for note taking and/or future reference.

Begin by explaining that a quality problem often has more than one solution, and that each solution must be tested on a small scale before committing time and resources to system-wide implementation. This is achieved through a pilot test.

■ Introduce the selection criteria:

Focused. Does the pilot test have well-defined parameters? If not, it may be cumbersome to implement and overly difficult to analyze the results. Pilot tests should specifically address and improve the underlying causes of the identified problems.

Supportable. Are staff members and facility leaders able to live with the proposed change? It is important to ensure that those who must live with a process day-to-day can also live with its proposed changes. Even if the test is successful without staff members' support, system-wide implementation is nearly impossible without it.

Immediate. Will the pilot test improve patient care/working conditions relatively quickly? The pilot test should produce visible change in the short term, thereby increasing the quality program's momentum and credibility. Pilot tests can be tested as quickly as 2 weeks.

Measurable. Can the improvement be measured to track progress? Ongoing measurement helps to ensure that project improvements are kept over time while also documenting the overall effectiveness of the quality program.

Getting Started

Divide the participants into teams of roughly equal size, 4-6 people per group. You can assign participants to teams yourself or ask them to count off by a given number and form teams with other participants who have the same number.



Scenario

Group Exercise

Distribute the scenario to each participant and provide directions for completing the exercise:

- Read the scenario individually.
- As a group, brainstorm potential answers to the problem. (Note: If you have not yet completed the Brainstorming Exercise, explain that participants should freely generate possible pilot tests during this time.) (5 minutes)
- Select the top 3 pilot tests and score how well they meet the 5 selection criteria. When finished, total your scores. (15 minutes)

Call time after the 5-minute brainstorming period and remain available to answer questions and facilitate the scoring process. Assist teams who have problems getting started or become stuck on a particular point.

Reporting Back

Call time after the 15-minute interval and ask a representative from one team to provide the team's top-scoring pilot test. Write the pilot test on the flipchart so that everyone can see it and ask the representative to walk through the individual scores for each of the 5 selection criteria. Repeat the process for the remaining teams.

Learning Transfer

Getting Started

Distribute the worksheet and give participants 5 minutes to complete it.

Debrief

If time permits, ask participants to individually share the problem and pilot test most likely to be chosen.



Wrap-up

Ask participants to provide feedback on whether or not they have achieved the objectives introduced at the beginning of the group learning session:

- To understand the purpose of selection criteria in evaluating a potential project pilot test
- To know how to choose a pilot test that is most likely to succeed

Schedule an informal follow-up session with any participant(s) who has not reached the objectives.

Selecting a Pilot Test: Scenario

Instructions:

Read the scenario and brainstorm 5-10 potential pilot tests. From your list, choose 3 pilot tests that seem most likely to eliminate the root cause of the problem. Then complete the selection grid to determine which test to implement.

Background:

A quality improvement team at an academic health center was recently assembled to help increase the percentage of HIV+ pregnant women receiving HAART therapy. After

analyzing baseline data and investigating the process, its members identified the following root cause:

A high percentage of pregnant women that were identified as HIV+ and pregnant were lost for follow-up, particularly those women who are minorities. Although women can be seen by the HIV Clinic or the hospital's OB/GYN clinic, this group of women are not returning for their regular appointments and the team fears that the HAART therapy is not appropriately continued.

Brainstorming: What are some pilot test ideas for improving the show rate of HIV+ women?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Selection Grid

List your top three pilot tests. Then, for each criterion, give a score from 1 to 5. (1-pilot test does not meet criterion; 5-pilot test completely meets criterion)

CRITERIA	PILOT TEST 1:	PILOT TEST 2:	PILOT TEST 3:
Focused			
Supportable			
Immediate			
Measurable			
Total Score			

Selecting a Pilot Test: Learning Transfer Worksheet

Instructions:

Think of an improvement project in your facility which is either underway or could be underway in the future. Using the information from today's session, brainstorm a list of 3 potential pilot tests and then complete the selection grid to help choose the most viable test.

For each criterion, give a score from 1 to 5.

(1-pilot test does not meet criterion; 5-pilot test completely meets criterion)

CRITERIA	PILOT TEST 1:	PILOT TEST 2:	PILOT TEST 3:
Focused			
Supportable			
Immediate			
Measurable			
Total Score			

Selecting a Pilot Test: Answer Key

The sample response does not provide pilot tests that the facility necessarily should or would select (particularly given the limited information about the problem), but rather one way that the facility could approach the selection process.

Potential Pilot Tests

1. Assign special case managers to follow-up with pregnant women
2. Provide beepers for clinic staff to contact pregnant women
3. During first appointment, ask for detailed contact information, including a family member or friend who can be contacted
4. Arrange special appointment with case manager to discuss barriers to follow-up
5. Provide special education by clinician about benefits of HAART therapy
6. Establish peer support group for pregnant women to follow-up
7. Schedule weekly phone calls by case manager to personally contact pregnant women who are more likely to be lost
8. Provide free transportation for pregnant women
9. Provide incentive for women who continue regimen during pregnancy
10. Provide educational classes to women

Selection Grid

(1-pilot test does not meet criterion; 5-pilot test completely meets criterion)

CRITERIA	PILOT TEST 1:	PILOT TEST 2:	PILOT TEST 3:
Focused	5	4	4
Supportable	5	4	2
Immediate	4	3	3
Measurable	3	4	4
Total Score	17	15	13