

## Systematize Improvements

### Participant training objectives:

- To understand basic strategies for sustaining the improvements achieved during QI projects
- To consider the tasks required to sustain quality gains

### Target audience:

QI committee members, HIV program leaders, QI team members, and staff involved in incorporating project-related changes into daily work processes

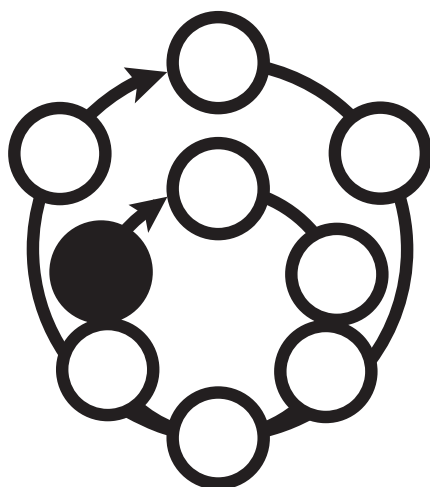
### Type of exercise:

Case study; individual and group exercise, 60 minutes

### Key concepts:

In order to sustain the gains achieved during quality improvement projects, team members must:

- Incorporate changes into existing systems
- Assign responsibilities
- Continue to measure performance
- Educate staff



### The Big Picture:

Quality improvement team members work to sustain project-related improvements during Step 6 of the HIVQUAL model: Systematize change. Without a concerted effort to incorporate project changes into existing work processes, the gains for which team members have invested significant time and resources are likely to recede over time.

SESSION AT-A-GLANCE	WHO	HOW LONG
1. Welcome, Learning Objectives, Agenda	Facilitator	5 minutes
2. QI Background: Strategies for Sustaining Improvements	Facilitator	10 minutes
3. Group Exercise: Case Study	Participants	20 minutes
4. Learning Transfer: Worksheet	Participants	20 minutes
5. Wrap-up	All	5 minutes
		60 minutes

## Materials

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

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

Photocopy the Case Study, 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.

## 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.

Prepare the training room:

- Arrange the tables and chairs in a circle or square shape, if possible.
- Tear off flipchart paper and make sure you have enough markers for the group(s) to use during the exercise.
- Set up and test equipment (e.g. overhead projector), if applicable.
- Make sure you have enough chalk or wipeboard markers, if applicable.

## Notes

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# Systematize Improvements: 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 basic strategies for sustaining the gains achieved during QI projects
- Consider the tasks required to sustain quality gains


## Agenda

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

- Group exercise on developing interventions to sustain quality improvement gains
- Presentation of basic strategies to sustain improvements
- Learning transfer worksheet to consider the tasks required to sustain improvements

## Quality Improvement Background

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

-  Introduce basic strategies for sustaining the gains achieved during quality improvement projects:

**Incorporate changes into existing systems.** Procedures and job descriptions should be updated to reflect any process changes.

**Assign responsibilities.** One staff member should have the responsibility to routinely revisit the improvements gains and its implementation, thereby gaining ownership of the improved process.

**Continue to measure performance.** The process should be re-measured routinely to ensure that gains have been kept.

**Educate staff.** Special training sessions should be scheduled to provide staff members, particularly those who are impacted by the improvement, with the knowledge and skills they need to make the change a permanent one.

## 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.

### Case Study Group Exercise

Distribute the case study and assign each team member a strategy for sustaining improvements. If there are more than 4 participants on a given team, ask members to work in pairs.

Provide directions for completing the exercise:

- Assign each team member one sustainability strategy (i.e. Incorporate changes into existing systems; Educate staff; Assign responsibilities; or Continue to measure performance.)
- Read the case study individually and list 3 interventions that would help the community care center implement your assigned strategy for sustaining improvements. (10 minutes)
- Regroup and report your interventions to one another.
- Discuss which of the team's actions are most likely to help sustain the improvements in the case study. List the top 5 interventions from all sustainability strategy categories on flipchart paper. (10 minutes)

Assist teams who have problems getting started or become stuck on a particular point. Alert participants when 5 minutes remain so that they are adequately prepared to report back.

## Reporting Back

Call time and ask one representative from each team to summarize the group's interventions. At the end, add any points from the answer key that the teams have not addressed.



## Learning Transfer

### Getting Started

Distribute the worksheet and give participants 10 minutes to complete it.

### Debrief

Ask participants to individually share a task related to one strategy and to provide the next steps in completing that task.



### 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 basic strategies for sustaining the gains achieved during QI projects
- To consider the tasks required to sustain quality gains

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

# Systematize Improvements: Group Exercise

## Instructions:

First fill out your assigned strategy in the lower part of the form. Next, read the case study, and brainstorm individually about 2 interventions that would help the community care center implement your assigned strategy for sustaining improvements. Next, report your interventions to the team. Of the entire list of the group's interventions, discuss which are most likely to help sustain the improvements in the case study and prioritize the top 5 interventions on flipchart paper.

## Case Study

At a large urban community care center, a QI team has just completed a project to increase the rate of patients who return for HIV test results and counseling. Over the past 12 months, the return rate decreased from 85% to 62%. The team's aim was to return to the original performance level of 85% and to simultaneously use the opportunity to look for strategies to increase the rate beyond that point.

After analyzing their system for providing HIV counseling and testing, team members piloted two solutions over a period of three weeks:

1. Patient incentive—coupons donated by the local fast food chain are given to those patients who return for HIV test results and counseling.
2. More convenient location—because many patients also receive methadone on a daily basis, HIV counseling and testing is offered at the methadone clinic.

For the three weeks the solutions were piloted, the return rate went up to 87% and the decision was made to incorporate the solutions into the system.

How can you sustain the high return rate for post-test counseling at the community care center within the scope of your assigned strategy?

## Strategy:

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1.

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2.

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## Systematize Improvements: Learning Transfer Worksheet

### Instructions:

Pick one project in your HIV program that has produced an improvement. Then, for each strategy in the table below, write down one task required to achieve the strategic aim and the steps required to complete it within the context of the chosen project. Be sure to include a timeline for each step.

STRATEGY	TASK	NEXT STEPS	TIMELINE
INCORPORATE CHANGES INTO EXISTING			
ASSIGN RESPONSIBILITIES			
CONTINUE TO MEASURE PERFORMANCE			
EDUCATE STAFF			

## Systematize Improvements: Answer Key

The sample response provides 5 interventions related to the 4 strategies for sustaining improvements. It does not describe how the facility should or would sustain the improvements, but rather one way that the strategies could be implemented.

### Strategy: Incorporate changes into existing systems

1. Establish policies to routinely provide post-test counseling at the methadone clinic for the patients seen there
2. Negotiate with the fast food chain to continue the incentives on a permanent basis

### Strategy: Assign responsibilities

3. Assign one representative of the QI team to monitor the progress of post-test counseling and report routinely to quality committee

### Strategy: Continue to measure performance

4. Generate a report to measure post-test counseling rates at both sites, initially on a monthly basis

### Strategy: Educate staff

5. Train staff at the Methadone Clinic to provide post-test counseling