

Sustaining the Quality Program: Understanding the Organization as a System

Participant training objectives:

- To understand that thinking of your organization as a system is an essential step to developing a relevant and sustainable quality program.
- To know how to use the Deming System Diagram to define the parts of your system.

Target audience:

Organizational leadership and other staff directly involved in the HIV quality program.

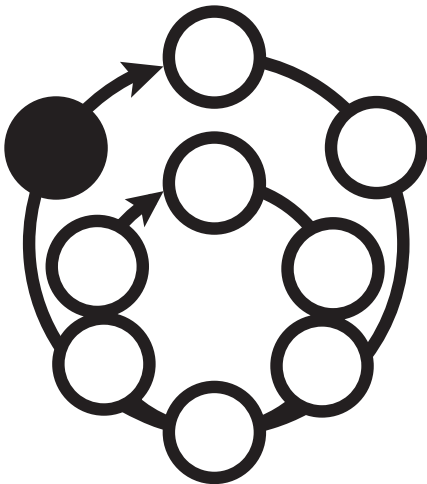
Type of exercise:

Group exercise, 60 minutes

Key concepts:

To sustain an organization's interest in quality, quality has to be linked to what really matters in the organization.

The Deming System Diagram is a tool that helps an organization align its quality program with its organizational purpose.



The Big Picture:

A sustainable quality program has staff who are fully invested in the program's overall focus and work together to implement, monitor and maintain improvements in quality across the facility. Definition of the quality program's focus is therefore very important. The annual evaluation of the quality program should include an assessment of this focus.

SESSION AT-A-GLANCE	WHO	HOW LONG
1. Welcome, Learning Objectives, Agenda	Facilitator	5 minutes
2. QI Background: Using the Deming System Diagram	Facilitator	15 minutes
3. Group Exercise	Participants	25 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:
 - Diagram and Scenario
 - Learning Transfer Worksheet
 - Copy of slide presentation
- 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 Diagram, Scenario, Learning Transfer Worksheet, and slide presentation for each participant.

Prepare your presentation slides for display. Options:

- Photocopy the slides, or write the slide content, on transparencies.
- Write the slide content 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.
- Set up and test equipment (e.g. overhead projector), if applicable.
- Make sure you have enough chalk or wipeboard markers, if applicable.

Notes

Sustaining the Quality Program: Deming System Diagram 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 how thinking of their organization as a system is an essential step to developing a relevant and sustainable quality program.
- Know how to use the Deming System Diagram to define the parts of your system.

Agenda

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

- Presentation of what it means to think of your organization as a system and how to use the Deming System Diagram to help with this
- Group exercise to develop a Deming System Diagram for HIV Primary Care
- Learning transfer worksheet to guide the creation of a Deming System Diagram for your own organization

■ Quality Improvement Background

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

Explain that the sustainability of a quality program depends on how well the program supports the core purpose of the organization. Staff will not commit to quality programs that they perceive to contain only “busywork” or to target unimportant functions.

One way to ensure your quality program focuses on important things is to clarify the key elements of your organization:

- what you produce
- who receives it (your customers)
- what community or social need you are meeting
- how your customers define the quality of your service

Traditional pictures of organizations (for example, tables of organization) do not show the inter-relationships of these elements. W. Edwards Deming, an expert in the quality field, developed a diagram of “The Organization as a System” that clarifies these interrelationships. Paul Batalden, a physician now at Dartmouth Medical School, developed a series of questions for health care providers to use to define their organization “as a system.” Batalden’s questions include:

- What product(s) do we make? What service(s) do we provide?
- Who uses or receives these products or services?
- What is the underlying, core need that those customers have for what you make?
- What measures or characteristics do customers use when they assess and judge the goodness or quality of what you make?

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 Deming System Diagram template to each participant and provide directions for completing the exercise:



As a group, answer the following questions in order, as they apply to primary care for persons with HIV and AIDS. Fill out the answers in the appropriate place on the Deming System Diagram Template

- Products: What product(s) do we make? What service(s) do we provide?
- Customers: Who uses or receives these products or services?
- Community/Social Need: What is the underlying, core need that those customers have for what you make?
- Key Performance Characteristics: What measures or characteristics do customers use when they assess and judge the goodness or quality of what you make?

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. Ask one team to present its list for “products.” When the team is done, ask for any other contributions from other teams. Move to the next team for “customers,” the next for “community/social need,” and then “key performance characteristics,” asking after each team’s presentation for additional items other teams had included. Then have a general discussion on what the diagram shows you should be considered in the design of a quality program for primary care services for HIV and AIDS.



Learning Transfer

Getting Started

Distribute the Learning Transfer Worksheet and give participants 5 minutes to complete it.

Debrief

If time permits, ask participants to individually share their question/problem statement and the most innovative idea from their lists.



Wrap-up

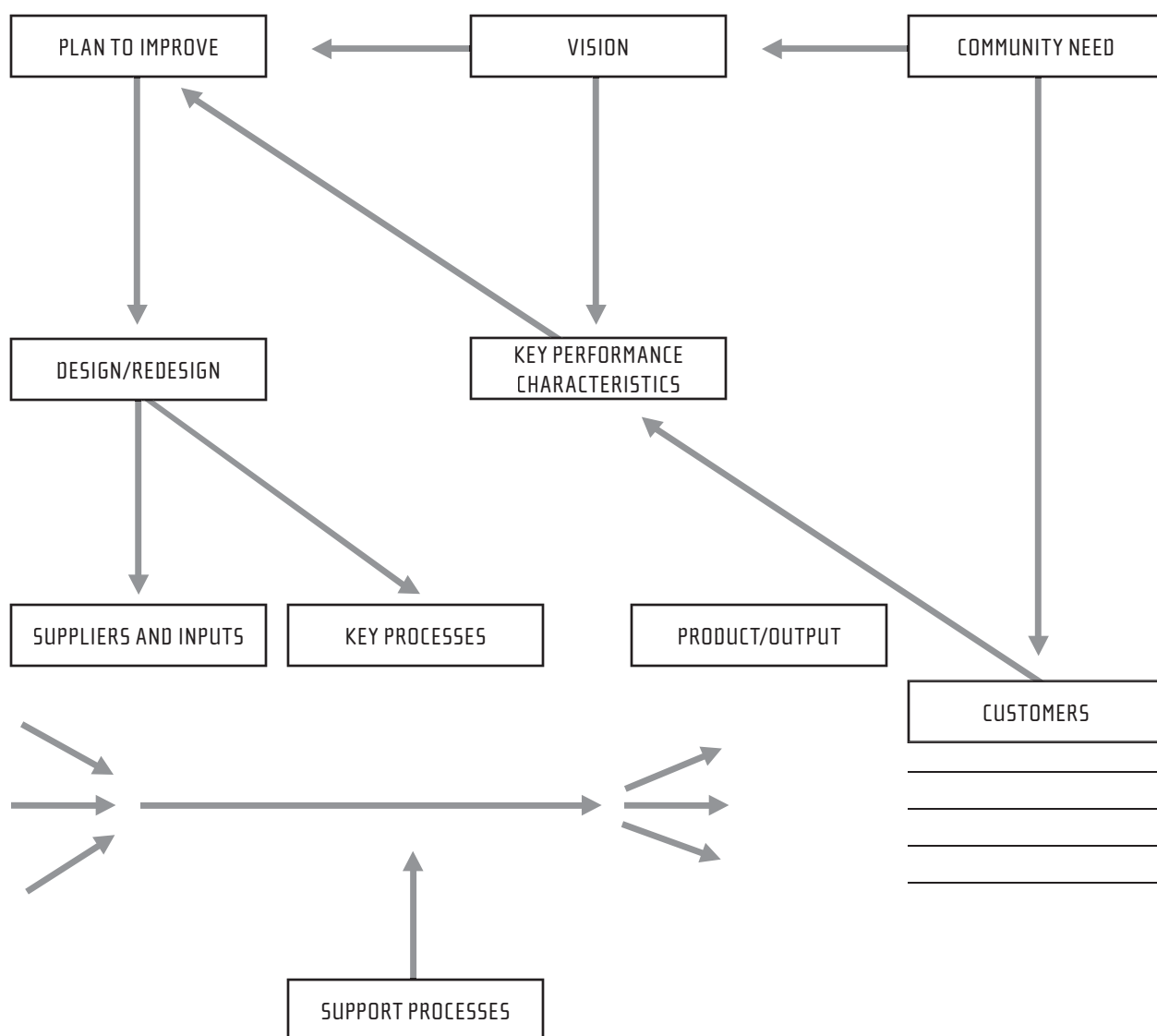
Ask participants to provide feedback on whether or not they have achieved the objectives introduced at the beginning of the group learning session:

- Understand how thinking of their organization as a system is an essential step to developing a relevant and sustainable quality program.
- Know how to use the Deming System Diagram to define the parts of your system.

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

This Exercise is adapted from “*Organizing Hospital Care as a System, an Annotated Guide*.” HCA Quality Resource Group, 1992.

Sustaining the Quality Program: Organization Viewed as a System



Sustaining the Quality Program: Learning Transfer Worksheet

Instructions:

Take a few minutes to jot down the results from the group exercise that you find most applicable to your own organization's HIV care program. Then note which of these are currently assessed by your quality program, and which are not. Identify two or three areas you will try to incorporate into your quality program.

QUESTION	ANSWER FOR MY ORGANIZATION
What product(s) do we make? What service(s) do we provide?	
Who uses or receives these products or services?	
What is the underlying, core need that those customers have for what you make?	
What measures or characteristics do customers use when they assess and judge the goodness or quality of what you make?	

What does our quality program currently capture?

What should we try to add?

1.

2.

3.

Sustaining the Quality Program: Understanding the Organization as a System: Answer Key

QUESTION	POSSIBLE ANSWERS (THERE MAY BE MORE)
What product(s) do we make? What service(s) do we provide?	<ul style="list-style-type: none"> • Primary health care services for people with HIV and AIDS • A physical environment in which care can take place • Information about HIV and its effective treatment • Referrals to other providers, social services
Who uses or receives these products or services?	<ul style="list-style-type: none"> • People with HIV and AIDS • Their families, partners and friends • Employees • Provider staff-in-training (e.g., medical residents, students in other disciplines) • Governmental funding agencies • Advocacy groups • Specialty care services and social services
What is the underlying, core need that those customers have for what you make?	<ul style="list-style-type: none"> • Reduction of the impact of HIV and AIDS on the lives of individuals with the diagnoses and on society as a whole

QUESTION	POSSIBLE ANSWERS (THERE MAY BE MORE)
<p>What measures or characteristics do customers use when they assess and judge the goodness or quality of what you make?</p>	<p><i>People with HIV and AIDS:</i></p> <ul style="list-style-type: none"> • Effectiveness of care • Respect and compassion from caregivers • Clarity and relevance of information given • Ease of use of facility (friendliness of support staff, waiting time, cleanliness of facility, etc.) • Confidentiality of care <p><i>Families, partners and friends</i></p> <ul style="list-style-type: none"> • Same as above • Information targeted to specific needs of this group <p><i>Employees</i></p> <ul style="list-style-type: none"> • Adequate resources to provide effective, respectful, compassionate care • Safe environment • Respect for their contribution • Opportunities to grow and advance <p><i>Provider staff-in-training (e.g., medical residents, students in other disciplines)</i></p> <ul style="list-style-type: none"> • Accurate information • Good teaching • Opportunity to practice skills • State-of-the-art models to follow <p><i>Governmental funding agencies</i></p> <ul style="list-style-type: none"> • Health care services that meet governmental standards • Non-wasteful use of government funds <p><i>Advocacy groups</i></p> <ul style="list-style-type: none"> • Same as patients • Responsiveness to their requests for information, action <p><i>Specialty care services and social services</i></p> <ul style="list-style-type: none"> • Complete information on any patients referred