Selecting an Improvement Project
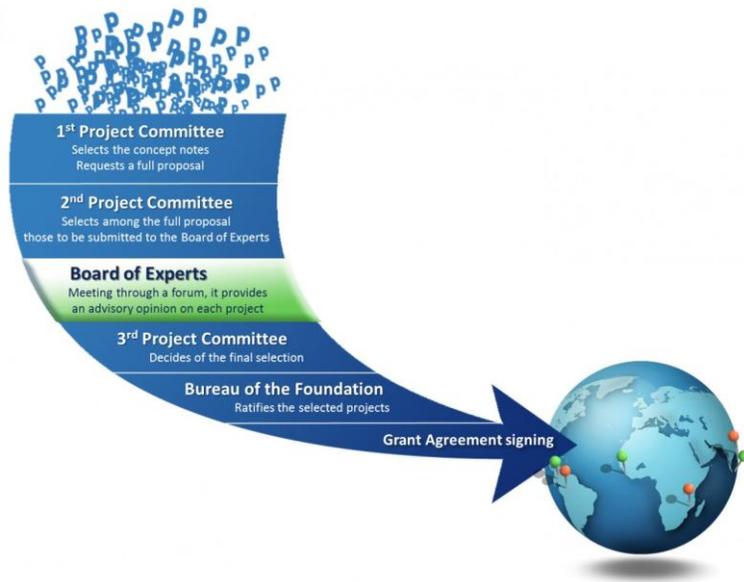
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Vice President

Objectives

- Describe the methods used to select an improvement effort
- List the members of the improvement team

Discussion

How are improvement projects selected at your place of work?

Project Prioritization Matrix

Item #	Domain	Area	Benefit $	Project Name	Project Selection Criteria	Clinical Excellence	Regulatory & Safety	Physician Satisfaction	Staff Satisfaction	Patient Satisfaction	Ease of Implementation	Financial Impact	Time to Complete	Sustainability	Weighted Priority Score
					Relative Importance to Hospital Facility	4.8	3.9	3.8	3.8	4.7	3.1	4.1	2.9	3.9	
1	Cardiac Svcs	Cath/EP	$750,000	Project 1	Campus A	9	1	9	3	9	9	9	3	9	243.6
2	Cardiac Svcs	Cath/EP	$650,000	Project 2	Campus B	3	1	3	3	3	3	9	1	9	139.4
3	Cardiac Svcs	Cath/EP	$35,000	Project 3	Campus C	1	1	3	3	1	1	3	3	9	95.4
			$1,435,000	GRAND TOTAL		62	12	57	34	61	40	86	20	105	

1st Project Committee
Selects the concept notes
Requests a full proposal

2nd Project Committee
Selects among the full proposal those to be submitted to the Board of Experts

Board of Experts
Meeting through a forum, it provides an advisory opinion on each project

3rd Project Committee
Decides of the final selection

Bureau of the Foundation
Ratifies the selected projects

Grant Agreement signing

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Selecting a Project

- Select a project that's important to you and your organization

- Examine what needs improvement
  - Outcome- e.g. harm reduction
 - Process: Efficiency – Remove processes that are wasteful

Sources of Information

- Data from key process indicators
- Incident/voluntary reports
- Serious incidents
- Recommended changes from professional organizations/literature
- Focus groups
- Processes that are unreliable

Selecting an Improvement Initiative

"In service of what?"

Manage a Portfolio of Projects
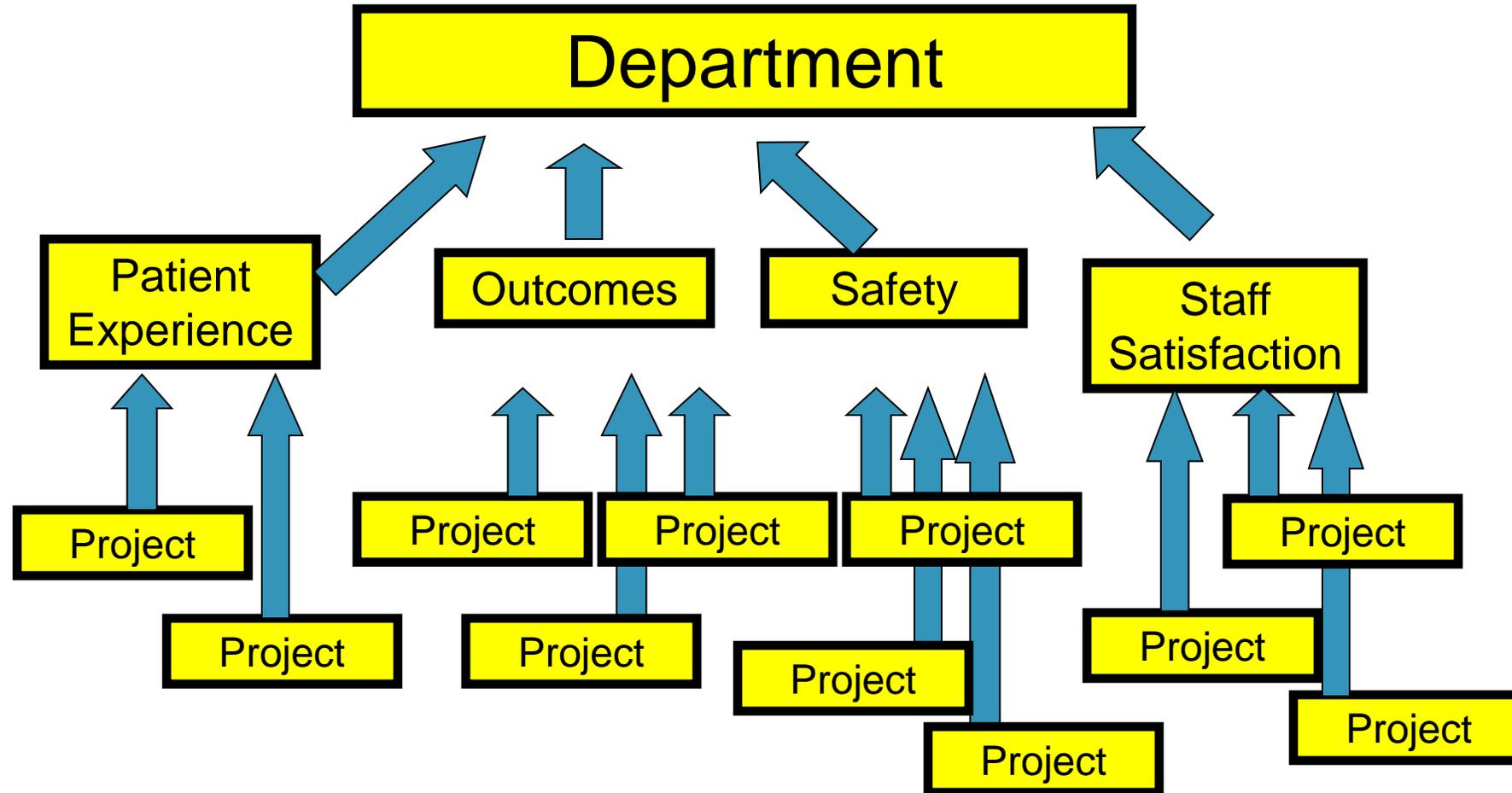
Consider

- Know what you are trying to improve
- Determine if there are 'ideas' to test that will result in improvement
- Plan if there are existing measures or will you have to develop your own
- Know if there are willing participants

Not Good Candidates for an Improvement Initiative

- Developing a measurement system
- One-time or infrequent training or educational workshops
- Any project where you cannot answer the question "How will you know a change is an improvement?"
- Huge ("solving world hunger") projects with short timeframes
- Politically charged issues

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Building the Improvement Team to Succeed

Discussion

How do you select individuals to be on your improvement team?

Team Effectiveness Depends on Two Factors

- The capabilities of individual team members
- The ability of team members to work together effectively

Forming the Improvement Team

- **Improvement team**: brought together to improve processes
- **Care team**: team that works together daily to provide care
  - May be the same people

Improvement Team

- Teams vary in size and composition.
- Each organization builds teams to suit its own needs.

Forming the Improvement Team

1. Review the aim.
2. Consider the system that relates to that aim: What system will be affected by the improvement efforts?
3. Be sure that the team includes members familiar with all the different parts of the process — managers and administrators as well as those who work in the process, including physicians, pharmacists, nurses, and front-line workers.
4. Engage an executive/project sponsor who takes responsibility for the success of the project.

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Examples of Examples of Effective Improvement Teams

- Clinical Leader
- Technical Expertise
- Day-to-Day Leadership
- Project Sponsor
- Patient/family/caregiver

Clinical Leader

- Teams need someone with enough authority in the organization to test and implement a change that has been suggested and to deal with issues that arise.

- The team's **clinical leader** understands both
  - the clinical implications of proposed changes and
  - the consequences such a change might trigger in other parts of the system.

Technical Expertise

- A **technical expert** is someone who knows the subject intimately and who understands the processes of care.

- An expert on improvement methods can provide additional technical support by helping the team determine what to measure, assisting in design of simple, effective measurement tools, and providing guidance on collection, interpretation, and display of data.

Day-to-Day Leadership

- A **day-to-day** leader is the driver of the project, assuring that tests are implemented and overseeing data collection.

- It is important that this person understands not only the details of the system, but also the various effects of making change(s) in the system.

- This person also needs to be able to work effectively with the physician champion(s).

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Executive/Project Sponsor

- In addition to the working members listed above, a successful improvement team needs a **sponsor**, someone with executive authority who can provide liaison with other areas of the organization, serve as a link to senior management and the strategic aims of the organization, provide resources and overcome barriers on behalf of the team, and provide accountability for the team members.

- The **Sponsor** is not a day-to-day participant in team meetings and testing, but should review the team's progress on a regular basis.

Patient as a Team Member

"Providing care that is respectful of and responsive to individual patient preferences, needs, and values and ensuring that patient values guide all clinical decisions."

Crossing the Quality Chasm: A New Health System for the 21st Century

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How to Engage Patients

- In their own care: "What matters to you"
- In Improvement initiatives
- In governance

Example Improving Critical Care

- Clinical Leader: ____, MD, Medical Director, Medical Intensive Care Unit (MICU)
- Technical Expertise: ____, MD, Intensivist
- Day-to-Day Leadership: ____, RN, MICU Manager
- Additional Team Members: Respiratory Therapy, Quality Improvement Specialist, Staff Nurse, Clinical Pharmacist, Clinical Nurse Specialist
- Sponsor: _____, MD, Chief Operating Officer
- Patient: _____ (someone who has received care)

- <u>One of these individuals will also be the Team Leader</u>

Example of Operating Room Team

- Clinical Leader: _____, MD Surgeon or Anesthesiologist
- Technical Expertise:_____ Director or Manager of Surgical Services
- Day-to-Day Leadership: _____ Operating Room (OR) Nurse (circulating or scrub nurse)
- Surgery Technician: _____
- One "continuity staff" with a cross-organizational view of flow, e.g., Operations Engineer or vice president with management responsibilities across departments/services, who will be assigned to this work over time
- One of these individuals will also be the Team Leader

Example of General Ward Team

- Ward/unit leader:_____ Charge nurse/nurse manager
- Trained nurses: _____, _____
- Nursing Assistants:_____, _____
- Physio/physical therapist: _____, _____
- Pharmacist/ Dietician/ Doctor if possible: _____
- Patient/ family member: _____
- Relevant nurse specialist: _____
- Patient: _____(Someone who has received care)

- <u>One of these individuals will also be the Team Leader</u>

Program Manager

- Pivotal in directing the tempo of change and improvement
- Will oversee spread at the individual hospital level
- Responsible for submitting a progress report and monthly data
- Will have frequent interactions with the Team Leader of each pilot team as well as individuals responsible for data collection
- Will frequently visit teams to support planned tests of change and well as to enthuse and inspire the teams

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Physician Champion

- A **physician champion's** primary role is to serve in a leadership capacity promoting and implementing changes that benefit physicians and their patients

Effective champions are

- often highly respected clinicians and, ideally,

- have experience in a specialty relevant to the initiative under consideration.

Physician Champion

A good champion has "professional gravitas," not necessarily "organizational gravitas" (i.e., a champion need not be a structural leader, and

- in some instances, participation as a structural leader might actually diminish the credibility of a champion).

- *But no personal characteristics are more important than both the courage to speak up when the project is about to be paralyzed by one physician's objections, and the social skill to be able to use one's voice effectively.*

Important Question That a Physician Champion Should Ask

What is the risk to our patients of *not* making the change?"

Reflection

What criteria have you used to select a topic for improvement?

What will you apply that you learned today?