



Healthcare and Homelessness

All Pilot Sites - Call #3

Welcome

Our Agenda

1. Introductions and Welcome
2. Practical strategies for managing improvement
3. Closing
 - Survey/feedback reminder



Introductions



Catherine
Mather

Project Director

Aleya Martin

Sr. Project Manager

Lauran Hardin

Faculty Coach

Catherine Craig

Faculty Coach

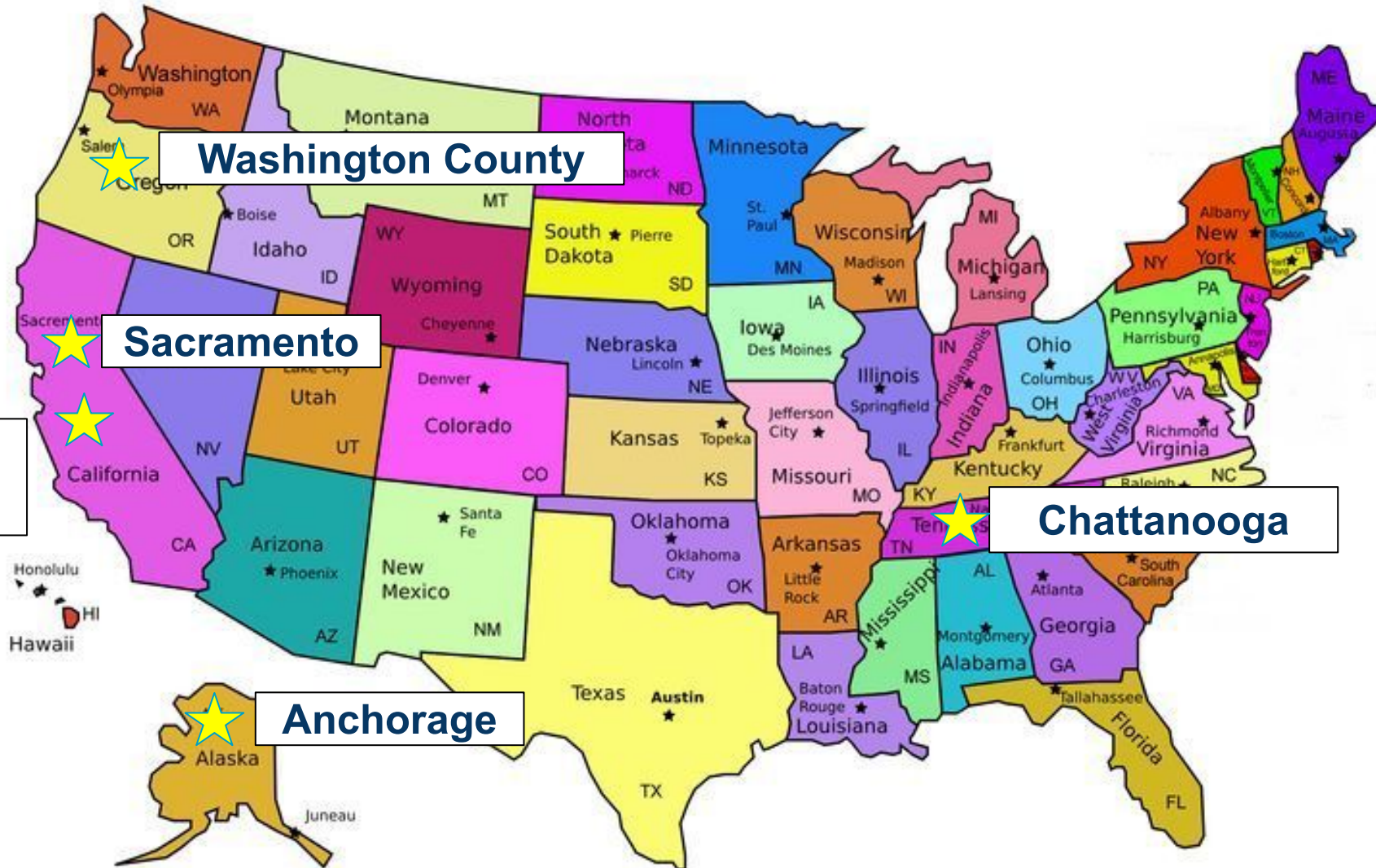
Anna Bialik

Improvement Advisor

Meg Arsenault

Senior Manager

Participating Pilot Teams



Introductions: Chat Waterfall

Please chat in:

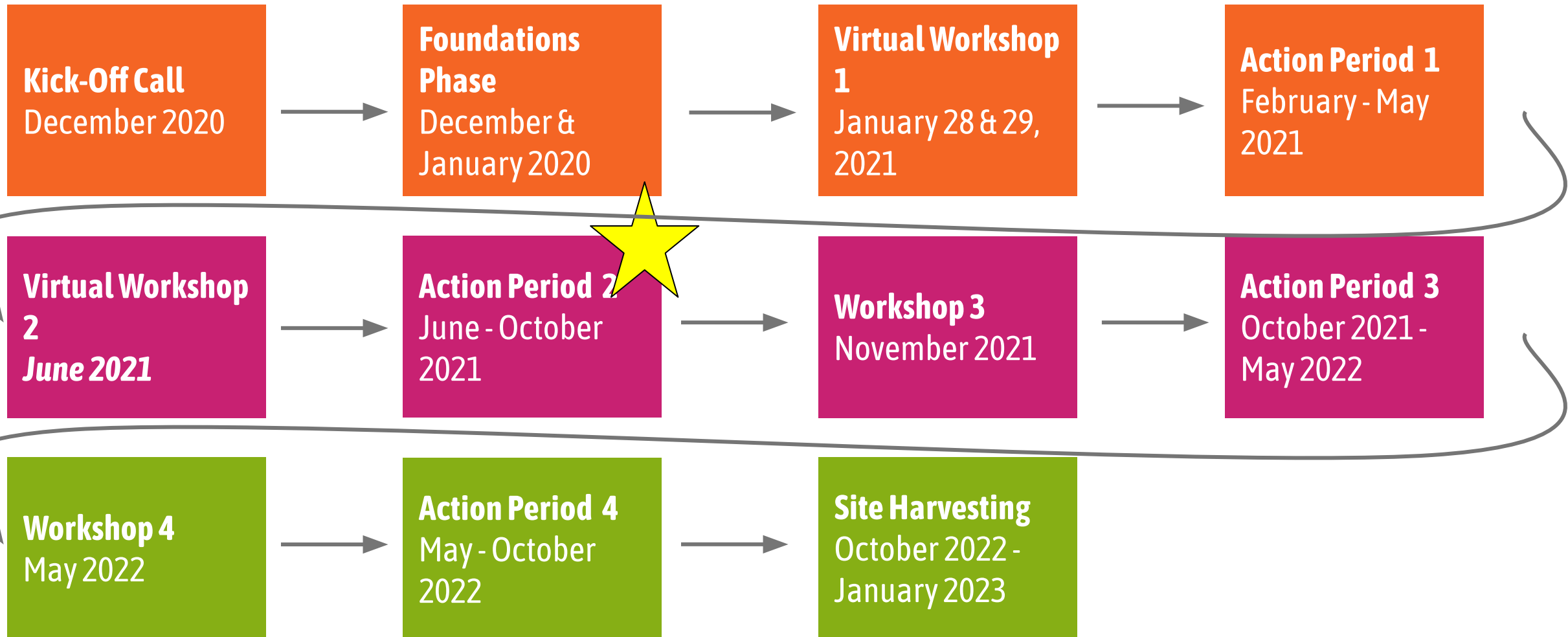
- Name
- Community
- Organization
- What is your favorite flower, plant, or tree?



Our Aim

Over the course of this 2 year Pilot initiative, pilot teams will have made measurable progress toward ending chronic homelessness, with a focus on building racially equitable systems.

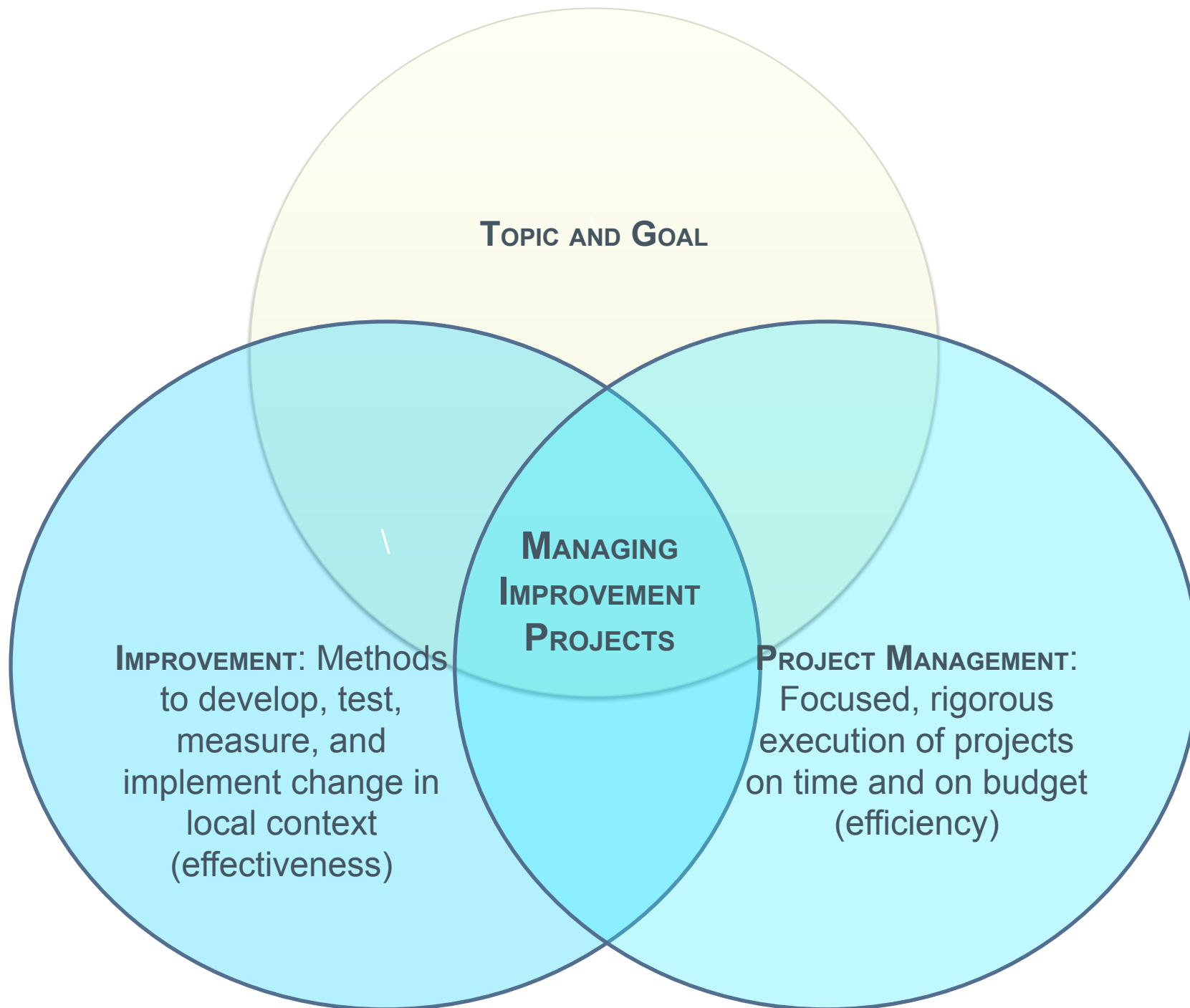
Our Journey Together in the Pilot



Important Dates

- **August 25, 2:00pm - 3:00pm ET / 11:00am - 12:00pm PT**
All Pilot Site Call
- **Pilot Site Team Coaching calls continue**
 - Anchorage: 4th Thursday of the month 10 - 11:30 AKT
 - Bakersfield: 4th Monday of the month 10:30 am - 12 pm PT
 - Chattanooga: 4th Monday 12 -1:30 ET
 - Sacramento: 3rd Wednesday of the month 9 - 10:30 am PT
 - Washington Co.: 3rd MOnday of the month 11 am - 12:30 pm PT
 -
- **November 2021: Date TBD**
Workshop 3

Practical strategies to manage improvement work



Value of project management

- Complete projects on time, within budget
- Be more predictable- PMs manage expectation, risk, issues, scope, quality
- Resolve problems more quickly
- Improved work environment – team ownership, proactive communication



- | | |
|----------------------------|-----------------------|
| 1 BE PROACTIVE | 2 FORECAST COMPLETION |
| 3 PRIORITIZE CRITICAL PATH | 4 COLLABORATE |
| 5 COMMUNICATE OFTEN | 6 BE ACCOUNTABLE |
| 7 CONTINUOUS IMPROVEMENT | |

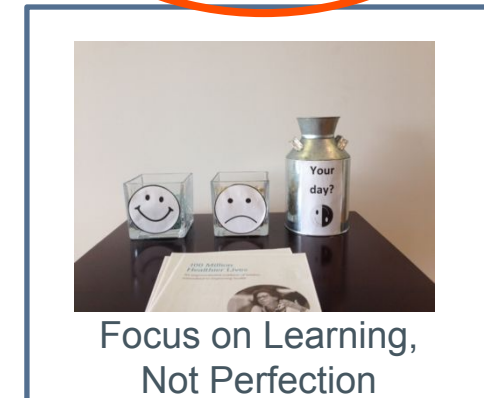
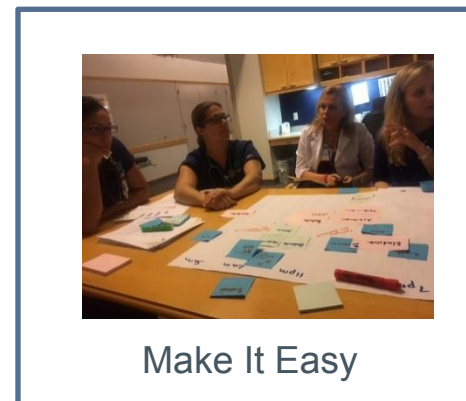
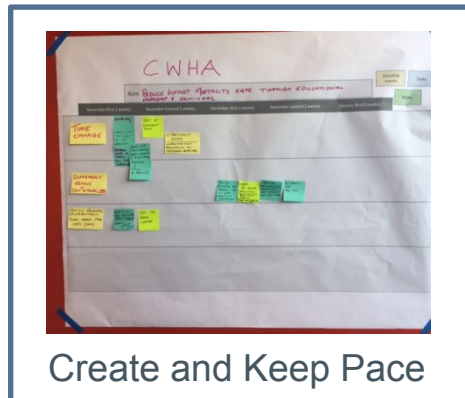
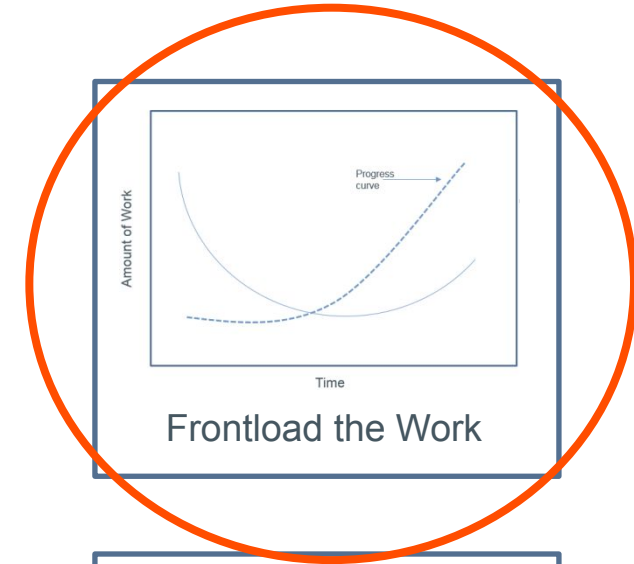
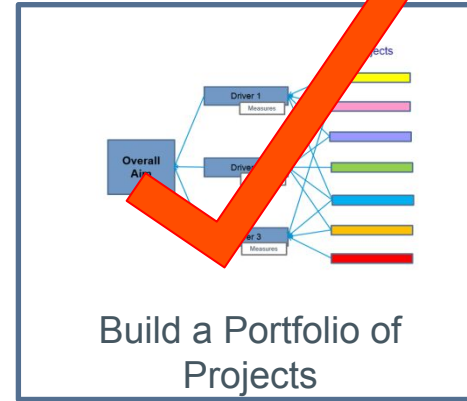
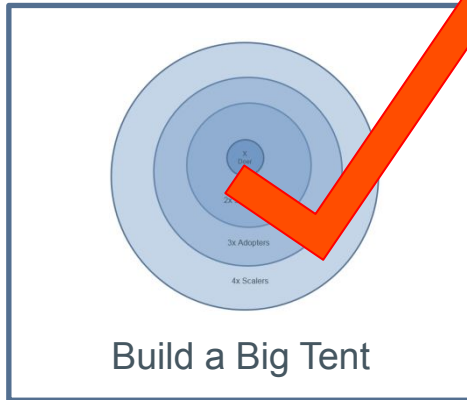


...and managing improvement projects is different

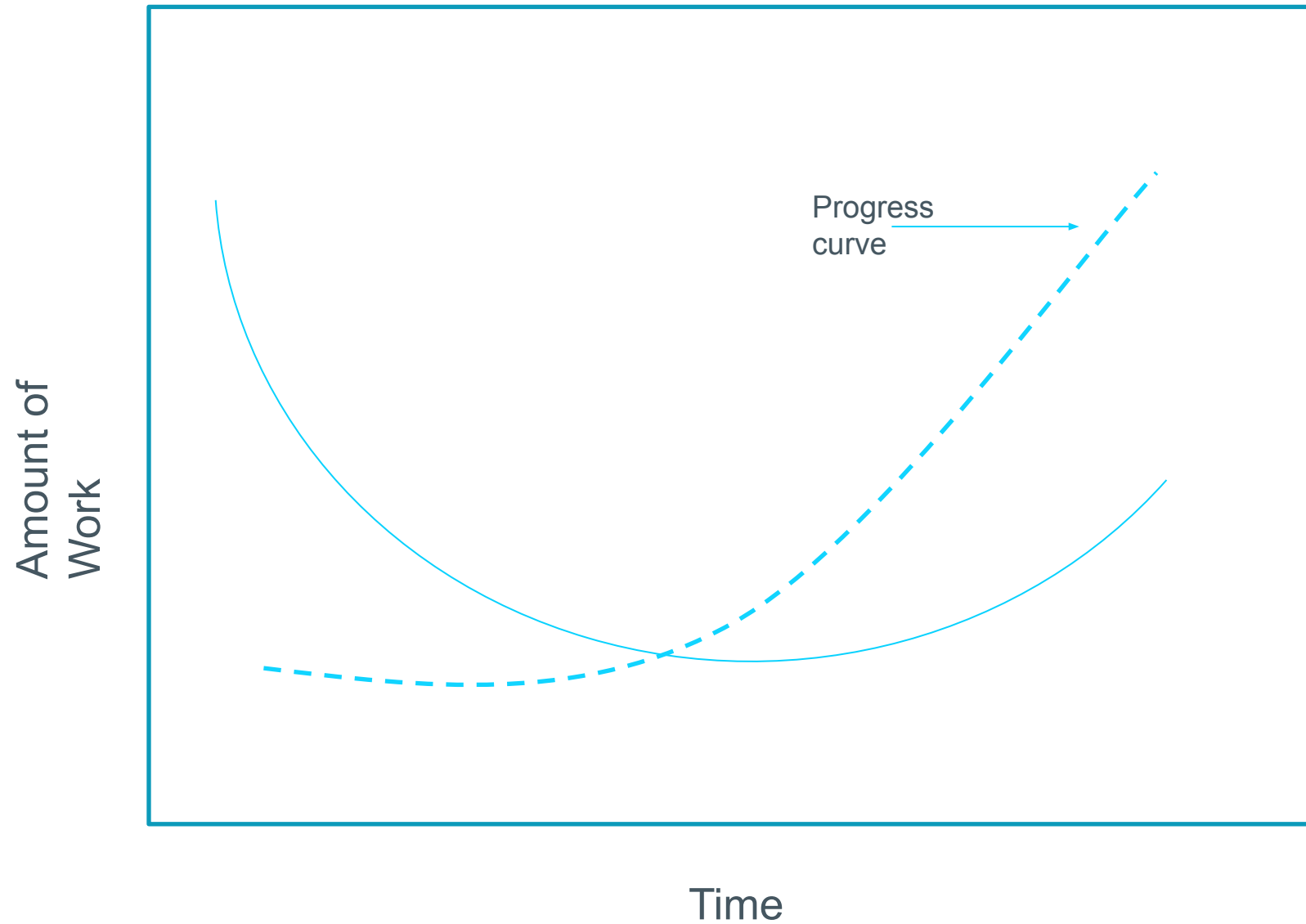
13

| Difference | Implication |
|--|--|
| Improvement project is rarely a full-time job for team leader or team | <ul style="list-style-type: none">• Link improvement to day-to-day work, e.g. build into existing work and meetings• Keep improvement front and center• Team may not be formally trained in methods• Create and keep the pace |
| How is known, but what (i.e., actions) depend on learning | <ul style="list-style-type: none">• Deliverable is a completed charter and progress towards your aim, rather than a concrete document or product• Need frequent touch points to assess learning and map work |
| Progress is harder to see due to delays between activity and movement in your data | <ul style="list-style-type: none">• Create ways to see progress before data reflects it• Document process of learning• Requires a sound theory for change |
| Encourage failure , not mitigate against it | <ul style="list-style-type: none">• Celebrate early failures and encourage honest reflection and unexpected outcomes• Step-down to learn quickly• Test at the scale appropriate to the risk |
| Everything is a moving target and a learning process | <ul style="list-style-type: none">• Everything is in pencil• Keep theory front and center AND don't be afraid to change it• Perfection is the enemy of the good |
| Project is never actually done (always more to improve or sustain) and pace is faster | <ul style="list-style-type: none">• Frontload the work• Select an endpoint (vs. end point being a deliverable)• Focus on sustainability at the outset |

Six practical strategies for managing improvement projects



Frontload the work



Example checklist to “see” progress

Aim

- ☒ Understand performance of current system
- ☒ Draft aim
- ☒ Create numeric theory for reaching aim

Measures

- ☒ Develop initial measures
- ☐ Test measurement strategy
- ☒ Collect baseline
 - ☒ Finalize baseline data for each of the 5 pilot programs
- ☒ Finalize measurement strategy (by 11/6)
 - ☒ Outline draft measurement by 11/13
- ☐ Create data collection plan by 11/13 (NEEDS ATTENTION)
- ☐ Begin collecting data by 11/13 (NEEDS ATTENTION)
- ☐ Data on run charts by 11/20
- ☐ Chart at least two data points (Jan)
- ☐ Chart at least 5 points (Feb)

Changes

- ☐ Understand how the current system works
- ☐ Conduct internal/external information gathering
- ☒ Develop driver diagram
 - ☒ Hold team meeting to draft
 - ☒ Finalize v1 by 10/23
- ☒ Identify high-leverage ramps by 10/23
- ☒ Develop a set of change ideas to begin testing by 10/23

Testing

- ☒ Run initial PDSAs
- ☒ Identify next PDSAs by 10/23 and continuing
- ☐ Run at least 4 PDSAs (multiple ramps) by 11/20
- ☐ Run at least 8 PDSAs
- ☐ Run at least 15 PDSAs

Other

- ☒ Schedule retreat
- ☒ Set-up team meetings
- ☒ Set-up meetings with executive sponsor
- ☒ Develop system to track and record information

See “Tools and Resources” Appendix for blank worksheet



Other methods to see progress

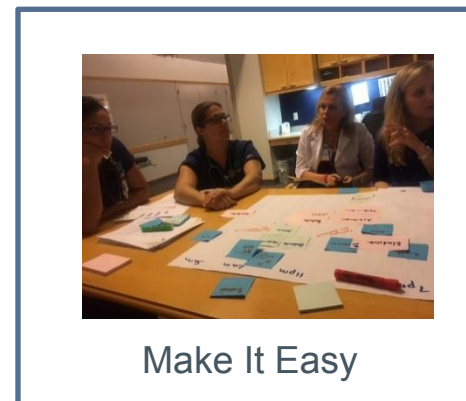
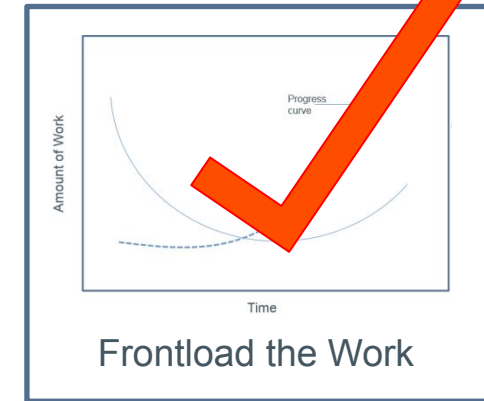
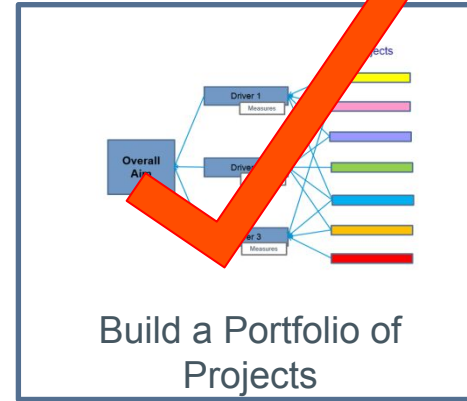
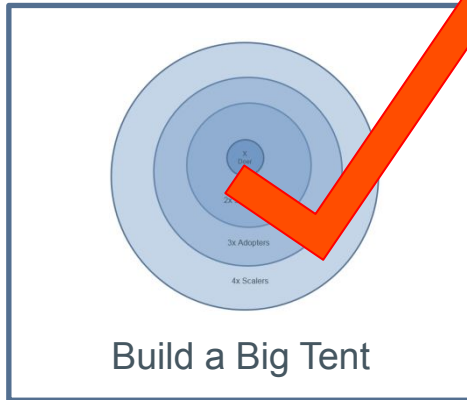
- Create a “to do”, “doing” and “done” visual display to move tasks as they get completed
- Start each meeting with “one win”
- Chart out expected progress for process or outcome measures and what tasks or tests will contribute
- Use a scale to assess team progress that include tasks in early movement
- Break down work into outputs, processes, and outcomes
- Use a specific example or case study to describe how the new process will work
- Share PDSA-level data, including qualitative feedback



All teach, all learn

How does your team identify early signs of progress?

Six practical strategies for managing improvement projects



Predict, create, and keep pace

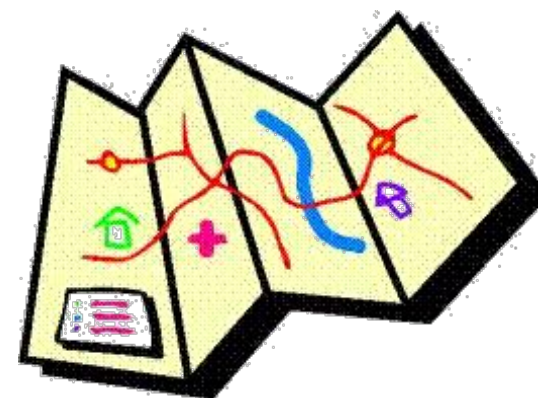
Set a start and end date

Establish regular meeting times to drive work forward

Use work planning to help identify the pace of improvement

Assess where you are against predicted milestones

| Projects / Tasks to Complete | Owner | Due Date | Status | Comments |
|------------------------------|-------|----------|--------|----------|
| | | | | |
| | | | | |



How often should a team be meeting for improvement work?

- As often as practically possible!
- Meeting more frequently for a shorter time (e.g. huddles) drives improvement work more effectively than a longer meeting less frequently.
 - Conducive to rapid cycle testing approach and action based learning



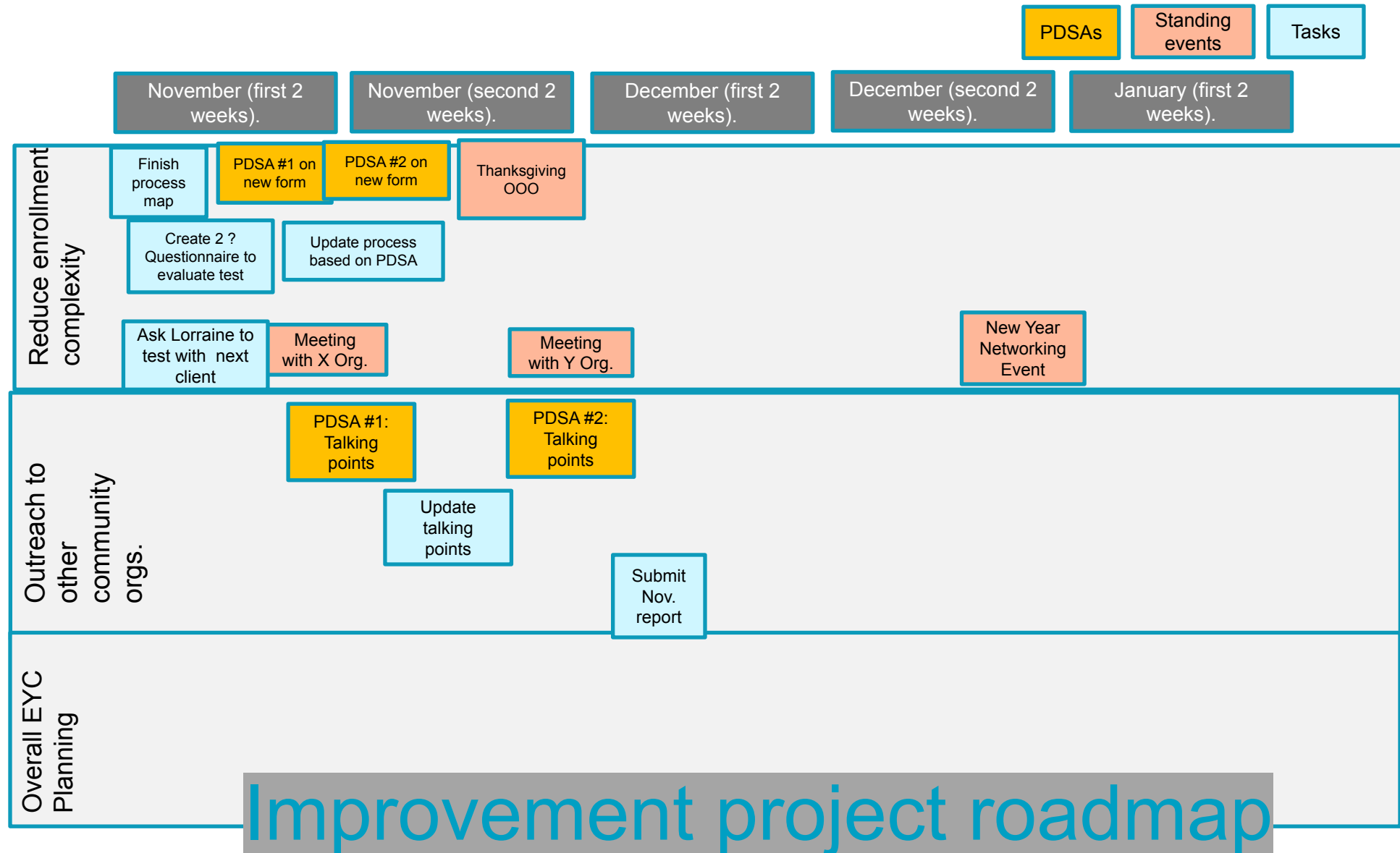
Project management work plan

Documents tasks, responsibilities, resources, due dates, time estimates,

| By-Name List Improvement Workplan | Lead BNL Project Manager: | | | | Coaching Notes 5/10 | Coaching Notes 5/24 | Coaching Notes 6/7 |
|-----------------------------------|---|-----------|------------|---|--|---|--|
| BNL Scorecard Area of Improvement | Action | By When | Status | Big Red Ball Holder | | | |
| 3. Tracking all individuals | Treatment Facilities - Valley Vista: Linda - Bartleborough Retreat: Linda - Serenity House: Linda - NFI Vermont: connect through Spectrum | 4/20/2018 | | Chris | | | |
| 4. Inactive policy | Solve for 211 HMS entry issue - create workaround for date of last contact, work group | 6/30/2018 | | Chris | | | |
| 4. Inactive policy | Figure out verbal consent for 211 for Vermont (211 and SSVF), contact legal aid | 4/25/2018 | | Chris | | Will 211 do data entry or stick with referrals? if they are going to do data entry then meg and aras will provide examples of communities doing this. | Meg and Aras will keep looking. Possible community connection in Detroit. Already have a workaround to step process, referral partners |
| 6. Timely and accurate updates | COTS is entering data into Master List | 6/30/2018 | Done | Will revisit after decision has been made | | | |
| 6. Timely and accurate updates | In policy indicate/designate a point of contact, possibly a navigator, to make homeless status updates | 4/25/2018 | In process | Chris | Continue to push that individuals are entered through coordinated entry, no side doors. Check in on housing committee meetings - may need to get more specific in policy. Note: come back early June and see if updates are being made | | |
| 6. Timely and accurate updates | Will check if report on timeliness is possible | 4/13/2018 | | Meghan | | | |
| 6. Timely and accurate updates | Check with Chicago on what they do | 4/13/2018 | | Meg + Aras | | | |
| 8. Unique identifier | All de-duplication done by June 30th | 6/30/2018 | | Sharon | | | |



Aim: Increase enrollment in our program by 50% (from 100 to 150) by December 31, 2016.



Gantt Chart

| Description | Owner | March | | | | | April | | | | May | | | | June | | |
|--|-----------|-------|-----------|------|------|------|-------|------|-----------|------|-----|------|------|------|------|------|------|
| Date/ Week Starting | | 3/2 | 3/9 | 3/16 | 3/23 | 3/30 | 4/6 | 4/13 | 4/20 | 4/27 | 5/4 | 5/11 | 5/18 | 5/25 | 6/1 | 6/8 | 6/15 |
| Calls and Learning Sessions | | | | | | | | | | | | | | | | | |
| Infrastructure calls | Meghan | | | | | | | | | | | | | | | | |
| Kick off call | Meghan | | | | | | | | | | | | | | | | |
| Collaborative calls | Meghan | | 3/10 | 3/17 | | | 4/14 | 4/21 | | | | | | | 6/9 | 6/16 | |
| Leadership calls | Catherine | | | | | | | | 4/28 | | | | | | | | |
| Measurement calls | Catherine | 3/3 | | | | | | | | | 5/5 | | | | | | |
| Learning Session 1 | All | | | | | | | | | | | | | | | | |
| Learning Session 2 | All | | | | | | | | | | | | | | | | |
| Learning Session 3 | All | | | | | | | | | | | 5/18 | | | | | |
| Faculty Calls | Meghan | | | | | | | | | | | | | | | | |
| D2D lead calls | Catherine | | | | | | | | | | 5/7 | | | | | | |
| Info calls for year 2 | | | | | | 3/31 | | | | | | 5/12 | | | | | |
| Other TA programs | | | | | | | | | | | | | | | | | |
| Impacting Outcomes and Costs for Patients with Complex Needs | | | | | | | | | 4/23/4/24 | | | | | | | | |
| Kick start the Triple Aim | | 3/4 | | | 3/25 | | 4/8 | | 4/22 | | | | | | | | |
| CFHI TA Seminar | | | 3/12-3/13 | | | | | | | | | | | | | | |



Using predictions to benchmark progress

February 2021

Pilot site formally enrolls in program and first point of contact is identified

Project sponsor identified

Score: 0.5

April 2021

Pilot team is identified key roles/leadership; roles and responsibilities are clear

Score: 1

Aim statement and team forming

May 2021

Pilot team has taken all singles scorecard + reported BFZ data for chronic homelessness (or completed some type of data analysis) to understand current baseline

Score: 1.5

Planning for project has begun

June 2021

Pilot team has identified a portfolio of projects (in at least three different pillars of the Theory of Change)

Score: 2

Activity, but no changes

September 2021

Pilot team is working on getting to a 28 on the scorecard and starting to report All Singles Data

Pilot team engages with Racial Equity Assessment

Score: 2.5

Changes tested, but no improvement

December 2021

Pilot team has received a 28 on the scorecard and is reporting quality chronic and all singles data

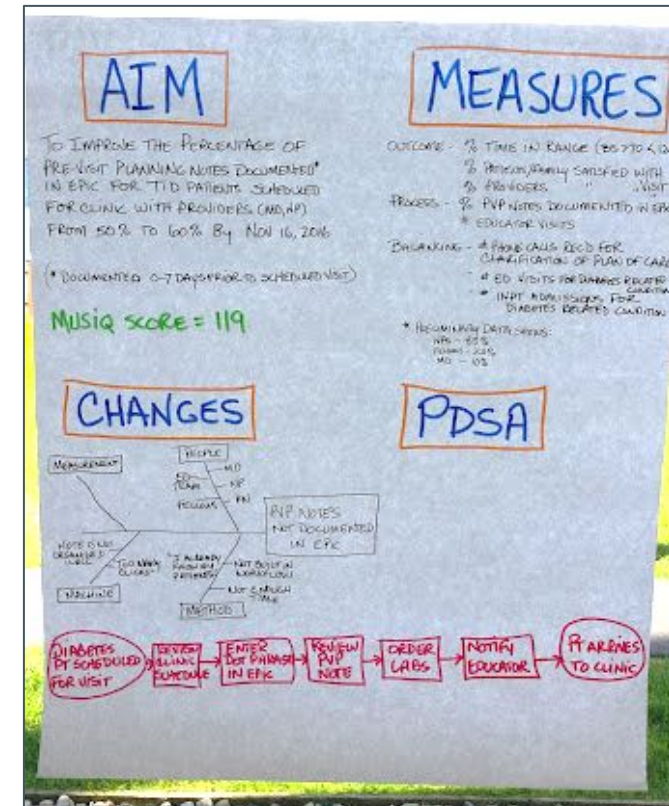
Pilot team is testing and reporting data on at least three of their projects

Score: 3

Modest improvement



Visual Management Boards:

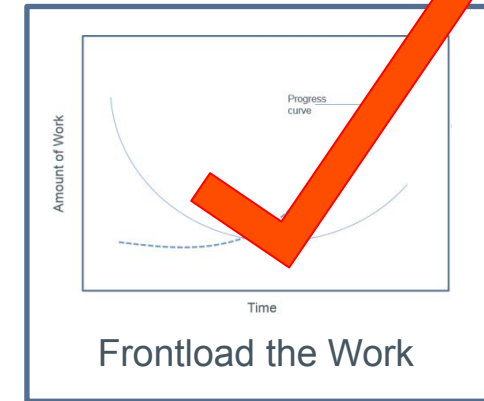
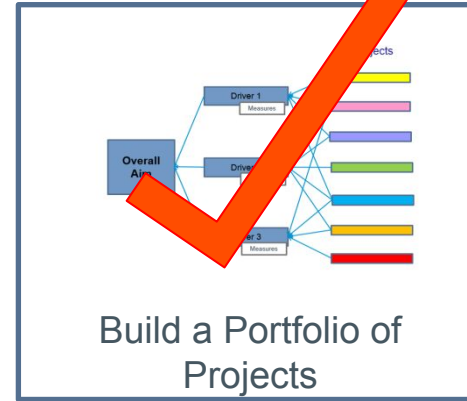
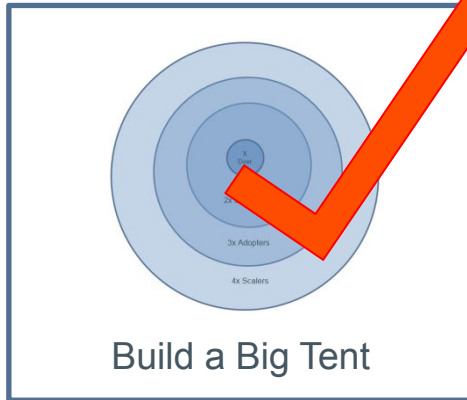


All teach, all learn

*What methods does your team use to communicate
around keeping pace toward outcomes?*

What technique would you like to try out?

Six practical strategies for managing improvement projects



Make It Easy



Make It Easy

Keep everything in one place

Acknowledge, praise, encourage the team

Make time

- Use existing structures and meetings
- Swap time for meetings and improvement work

Use good meeting hygiene

- **Meeting roles**
- **Standard meeting process and agenda**

Use “we would” to engage team in problem solving



Example team meeting agenda

Work through agenda items:

- A. How easy was this task for you in the last week? (2 mins)
 - Very easy, easy, difficult
- B. Report out on any tests (5 mins)
 - Anyone save a PDSA or data in Dropbox?
- C. Review outcome data/measures (10 mins)
- D. Project Assessment Tracker (5 mins)
- E. Anything else? (5 mins)

27 minutes total

(includes building PDSAs and collecting measures)



| Week 1: Pace Improvement and Share Real-time Learning (25 min.) | | Week 2: Big Picture Improvement (45 min.) | | Week 3: Pace Improvement and Share Real-time Learning | | Week 4: Monitoring Short-term Progress | |
|--|--|--|--|--|--|---|---|
| Min. | Topic | Min. | Topic | Min. | Topic | Min. | Topic |
| 10 | Tests: <ul style="list-style-type: none"> Report out on any previous tests (prediction, PDSA data, next PDSA) Identify tests to run this week, including expanding scope of previous tests | 15 | Review bigger picture: Are we making progress against our ultimate goal? | 10 | Tests: <ul style="list-style-type: none"> Report out on any previous tests (prediction, PDSA data, next PDSA) Identify tests to run this week, including expanding scope of previous tests | 10 | Review regulated metrics: <ul style="list-style-type: none"> Are there any dollars at risk? Are we making enough progress to hit our short-term goals? |
| 10 | Review data: <ul style="list-style-type: none"> PDSA measures Improvement measures Stories | 10 | Review data set: <ul style="list-style-type: none"> Metrics that matter Outcome, process, & balancing measure Regulated measures Stratify to look for any changes in disparities | 10 | Review data: <ul style="list-style-type: none"> PDSA measures Improvement measures Stories | 10 | Adjust plan to meet metrics: <ul style="list-style-type: none"> If meeting metrics, what would we continue? Continue to progress? If not, what's our plan to adjust work to meet goals? |
| 5 | Identify next steps and owners | 20 | Revisit change ideas: <ul style="list-style-type: none"> Are our ideas sufficient to move the aim? Do we need to generate or try new ideas? What are the handful of ideas that we want to make progress on? | 5 | Identify next steps and owners | 5 | Identify next steps and owners |
| Pre-work: <ul style="list-style-type: none"> Team leader to make sure improvement measures are updated. Team members to come with results of PDSAs and proposal to either adapt, adopt, or abandon change. | | Pre-work: <ul style="list-style-type: none"> Team leader to make sure measure are available for the team. Team leader to bring ideas (brainstormed, tried, interested in trying) | | Pre-work: <ul style="list-style-type: none"> Team leader to make sure improvement measures are updated. Team members to come with results of PDSAs and proposal to either adapt, adopt, or abandon change. | | Pre-work: <ul style="list-style-type: none"> Team leader to make sure regulated measures are updated, including whether any dollars are at risk. | |



Make it easy: “We would” example

“We don’t have enough time.”

- Reframe: We would have enough time if...
- Examples:
 - ...we engaged someone in another community-based organization to help
 - ...we limited team meetings to 15 minutes per week

“The data team will never go for this.”

- Reframe: The data team would be willing to help if...
- Examples:
 - ...they had a hand in mapping out the new process
 - ...we engaged Megan, the thought leader for the group
 - ...we really listened to their concerns and co-designed the solution

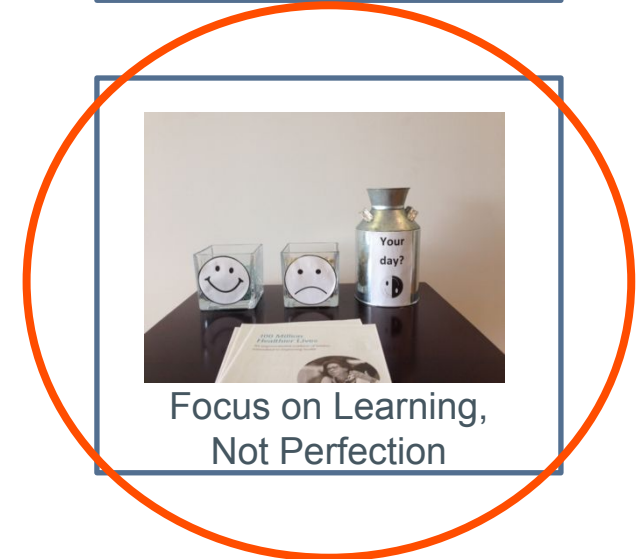
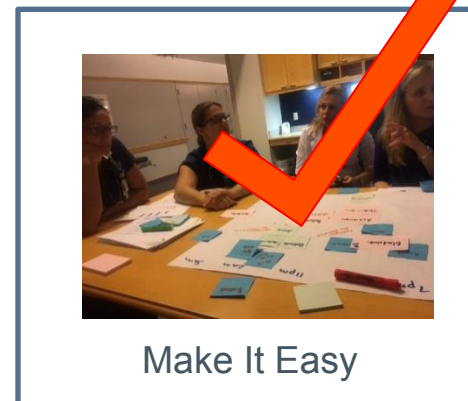
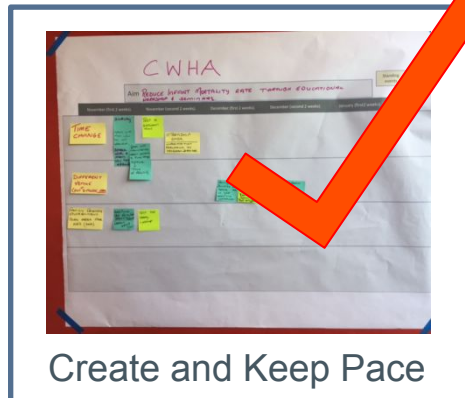
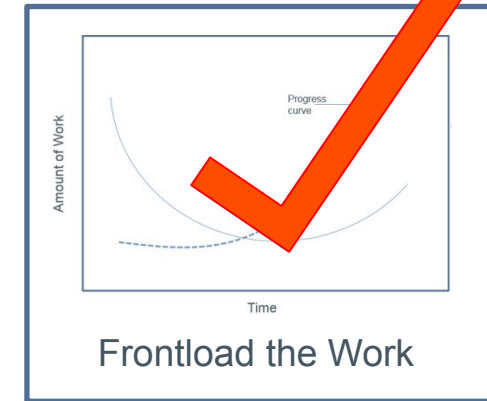
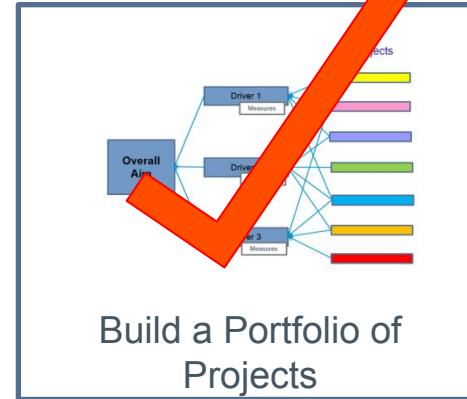
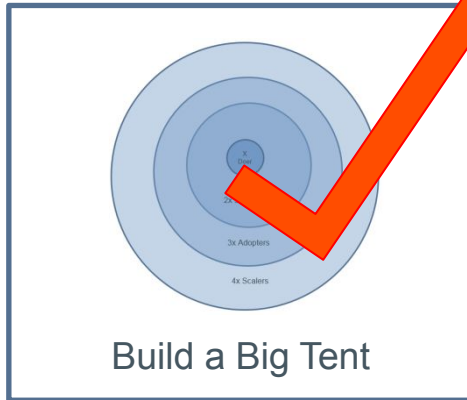
See “Tools and Resources” Appendix for blank worksheet



All teach, all learn

*How are you structuring cross-sector meetings
between the health and homeless response systems?*

Six practical strategies for managing improvement projects

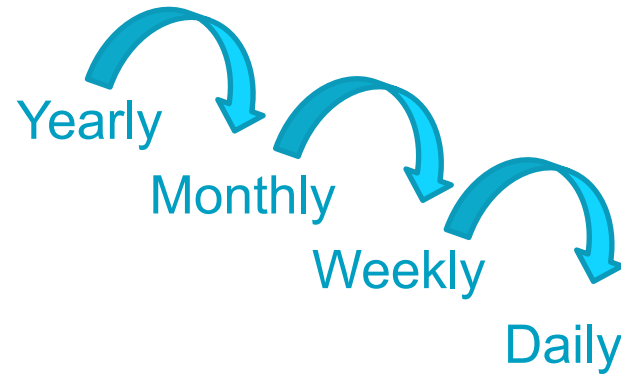


Don't let perfect be the enemy of good

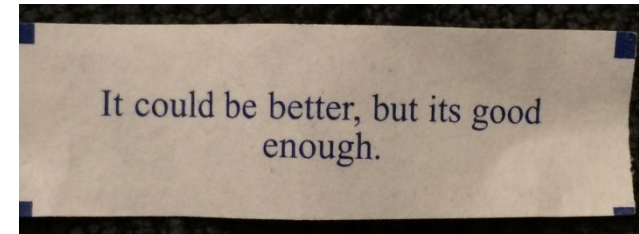
Everything in
pencil



“Step-down” to learn
quickly



“Good enough” data
to drive improvement



Fail forward

Pen & paper, tics and tallies work just fine

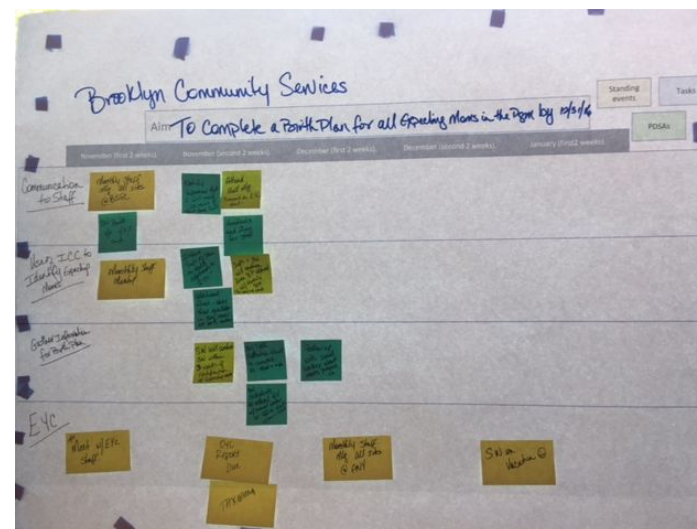


| 10-11 PM | | |
|--------------|-----------|--|
| ___ Bathroom | ___ Meds | |
| ___ Pain | ___ Labs | |
| ___ Food | ___ Other | |
| 11 PM- 12 AM | | |
| ___ Bathroom | ___ Meds | |
| ___ Pain | ___ Labs | |
| ___ Food | ___ Other | |
| 12-1 AM | | |
| ___ Bathroom | ___ Meds | |
| ___ Pain | ___ Labs | |
| ___ Food | ___ Other | |
| 1-2 AM | | |
| ___ Bathroom | ___ Meds | |
| ___ Pain | ___ Labs | |
| ___ Food | ___ Other | |
| 2-3 AM | | |
| ___ Bathroom | ___ Meds | |
| ___ Pain | ___ Labs | |
| ___ Food | ___ Other | |
| 3-4 AM | | |
| ___ Bathroom | ___ Meds | |
| ___ Pain | ___ Labs | |
| ___ Food | ___ Other | |
| 4-5 AM | | |
| ___ Bathroom | ___ Meds | |
| ___ Pain | ___ Labs | |
| ___ Food | ___ Other | |
| 5-6 AM | | |
| ___ Bathroom | ___ Meds | |
| ___ Pain | ___ Labs | |
| ___ Food | ___ Other | |

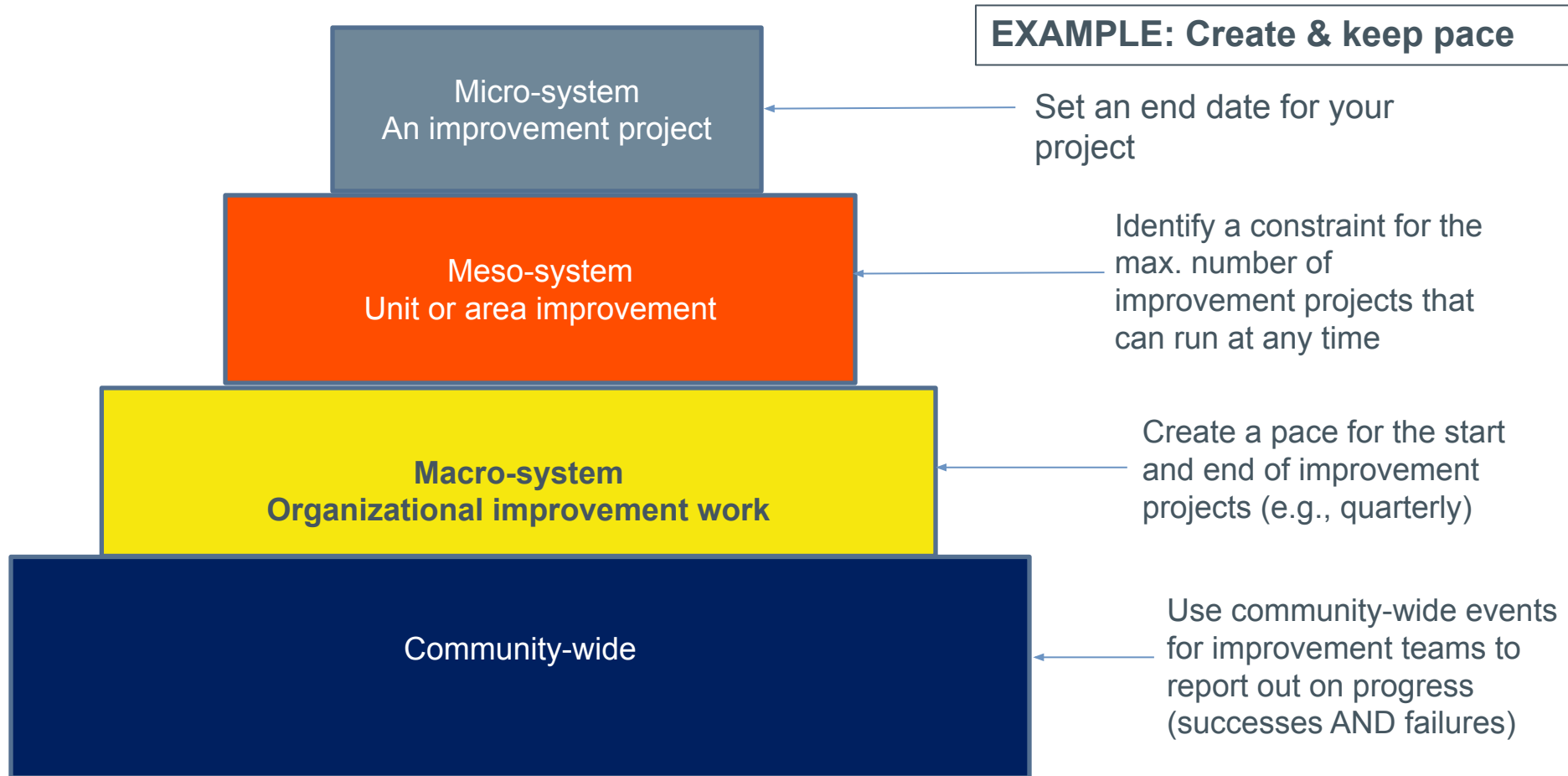
Ophthalmology Rapid Improvement Event – Core Rooming Workflow
ACTION ITEMS PLAN

Last Updated: UW Health uwhealth.org

| # | Task Description | Person Responsible | Due Date | Status | Comments |
|---|---|--------------------|------------------|--------|-------------------------|
| 1 | Bring visual for clearing vision | MSR | 2/28 | | Support Small test #2 |
| 2 | Tear survey for clearing vision | MSR | later on in week | | Support Small test #2 |
| 3 | Share Blue Dot tutorial - Cori to ask Chad | Schulder @ East | by 3/1/17 | | Take PM Blue Dot test |
| 4 | Call to talk to Amber | Schulder @ East | 2/28 AM | | Further clarify test #4 |
| 5 | Get copy of facesheet | MSR | 2/28 AM | | |
| 6 | Share visit navigator workflow | MSR | | | |
| 7 | tutorial on changing visit navigator | Julie | | | |
| 8 | PE Kamta "merch" order of visit navigator test (#1) | | | | |
| 9 | Check workflow → for testing purposes → | | | | |



Principles are applicable at many levels



Closing

Important Dates

- **August 25, 2:00pm - 3:00pm ET / 11:00am - 12:00pm PT**
All Pilot Site Call
- **Pilot Site Team Coaching calls continue**
 - Anchorage: 4th Thursday of the month 10 - 11:30 AKT
 - Bakersfield: 4th Monday of the month 10:30 am - 12 pm PT
 - Chattanooga: 4th Monday 12 - 1:30 ET
 - Sacramento: 3rd Wednesday of the month 9 - 10:30 am PT
 - Washington Co.: 3rd MOnday of the month 11 am - 12:30 pm PT

Questions

Faculty Coaches

- Washington County, Bakersfield, Anchorage
 - **Lauran Hardin** (IHI)
lhardin@camdenhealth.org
 - **Anna Bialik** (BFZ)
abialik@community.solutions
- Sacramento, Chattanooga
 - **Catherine Craig** (IHI)
catmcraig@gmail.com
 - **Anna Bialik** (BFZ)
abialik@community.solutions

General

- **Catherine Mather** (IHI)
cmather@ihi.org
- **Meg Arsenault** (Community Solutions/BFZ)
marsenault@community.solutions

Feedback reminder

Please take a few minutes to complete our survey from Workshop 2

<https://forms.office.com/r/yuphFgR6Jo>

Your feedback will help us as we plan for Workshop 3 in November, 2021

The background is a stylized illustration. At the top center is a bright orange sun with thin yellow rays. It is surrounded by several large, soft, white and light pink clouds. The sky is a solid light blue. In the bottom right corner, there are stylized, geometric buildings in shades of grey and blue. The overall style is clean and modern.

Thank You

Appendix: Tools and resources to manage improvement projects

Resources

- - [WIHI broadcast \(July 2016: Strategies for Managing Quality Improvement Projects:](#)
 - [Blog post: 5 Practical Strategies to Managing Improvement Projects.](#)
 - [QI Project Management Toolkit](#)
 - [Visual Management Boards](#)
 - [Huddles](#)
 - [5 Tips for Better Huddles](#)



Frontload the work: Project set-up checklist

Aim

- ☐ Understand performance of current system
- ☐ Draft aim
- ☐ Create numeric theory for reaching aim

Measures

- ☐ Develop initial measures
- ☐ Test measurement strategy
- ☐ Collect baseline
- ☐ Finalize measurement strategy
- ☐ Create data collection plan
- ☐ Begin collecting data
- ☐ Set-up run charts to make plotting data easy

Changes

- ☐ Understand how the current system works (e.g., observation, process flow)
- ☐ Conduct internal/external information gathering (e.g., interview key stakeholders)
- ☐ Develop driver diagram
- ☐ Identify high-leverage PDSA ramps
- ☐ Develop a set of change ideas to begin testing by 10/23

Testing

- ☐ Develop schedule for testing
- ☐ Run initial PDSAs
- ☐ Identify next PDSAs

Other

- ☐ Schedule retreat
- ☐ Set-up team meetings
- ☐ Set-up meetings with executive sponsor
- ☐ Develop system to track and record information
- ☐ Communicate about efforts with key stakeholders



Create and Keep Pace: Work plan template

* St

| Task | By When? | Description | Status* | Who? | Notes |
|------|-------------|-------------|---------|------|-------|
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Make it easy: “We Would” worksheet

- We don't/can't _____
 - Reframe: We would _____ if...
 - ... _____
 - ... _____
 - ... _____
- We don't/can't _____
 - Reframe: We would _____ if...
 - ... _____
 - ... _____
 - ... _____

