CARE STUDY

Worksheets

ENHANCING CARE PROCESS

AGENDA TEMPLATE

FOCUS AREA of Meeting (select one)
- ✓ Getting to Know Your Clinic
- ✓ Using Data to Identify a Target for Change
- ✓ Brainstorming Opportunities for Change
- ✓ Choosing a Solution
- ✓ Testing a Solution
- ✓ Rolling out a Solution
- ✓ Continuous Tracking and Monitoring

Date _____   Notetaker _____

Members Present _____

_____

OBJECTIVES FOR MEETING

1. _____

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2. _____

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AGENDA ITEMS

1. _____

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2. _____

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3. _____

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4. _____

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NEXT STEPS	STAFF RESPONSIBLE

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Worksheet 1

Getting to Know your Clinic: DATA

Planning for Using Data to Get to Know Your Clinic
What do we want to know?
What information will be collected?
Where is it found?
Who will be responsible for collecting the information?
What format will it be gathered in?
How will the information be evaluated?
Who will evaluate it?
How will the information be presented? (e.g. graph, chart)

What did our evaluation tell us about the clinic?

GETTING TO KNOW YOUR CLINIC: WALKTHROUGH

WALKTHROUGH

PLANNNG THE WALKTHROUGH

What is the workflow to be explored?	
What parts of the workflow can be simulated as a client?	
Who will be conducting the walkthrough?	
How will the walkthrough be conducted?	
Will it include an actual test client?	Yes No
What are the steps in the process?	
Where will it be conducted?	

Pre-Walkthrough: **What are the Main Goals?**	Post-Walkthrough: Brief Notes for each Goal

POST WALKTHROUGH REFLECTIONS

Main Lessons Learned from Walkthrough

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_____

_____

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POSSIBLE TARGET AREAS for Change

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GETTING TO KNOW YOUR CLINIC: Site Observation

PLANNNG THE Site Observation

What is the workflow to be explored?	
What parts of the workflow can be observed?	
Who will conduct the observation	
How will the observation be conducted?	
When will it be conducted?	
What are the steps needed to plan the observation?	
Where will it be conducted?	

Pre-Observation: **What are the Main Goals?**	Post-Observation: Brief Notes for each Goal

POST SITE OBSERVATION REFLECTIONS

Main Lessons Learned from Site Observations

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POSSIBLE Target AREAS for Change

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THE ENHANCING CARE PROCESS

Identify a target for change

Brainstorm opportunities for change

Ongoing Tracking and Monitoring

← Choose

Roll out →

Text

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THE ENHANCING CARE PROCESS: Identify a Target for Change Using Data

1) <u>What did 'getting to know the clinic' tell us about what parts of the clinic process could be changed or new processes be implemented?</u>

2) <u>Where do you see the most potential for impact or improvement in the clinic?</u>

3) <u>What is your target for change?</u>

   Which major target are you going to focus on (check 1):

   OUD Medication   or   Retention

   What is your more specific target for change (e.g., improving retention in first week):

   How big of an improvement do you want to make? (e.g., We want to increase the number of people retained in treatment in the first week from 30% to 60%):

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Enhancing Care: Brainstorming Opportunities for Change

Target for Change (write in here):

Select a brainstorming method from the figure on page 8

List Potential Opportunities for Change: What are all of the points in a client's care that could affect the target? Where may be some good points in the clinic workflow to change clinic process?

1

2

3

4

5

ENHANCING CARE: Brainstorming Opportunities for Change

The following are examples of activities the implementation team can engage in to help brainstorm opportunities for change:

1. Stepladder Brainstorm:
    Begin by forming a group of two members and have them discuss the issue in front of the team. A third member then joins and presents a solution and any additional solutions proposed by the original two members are discussed as well. Add another member and repeat the process until all members of the team have been brought into the discussion and have presented ideas. A final decision is reached once all members have discussed their proposed solutions.

2. Reverse Brainstorming:
    Once the issue for change has been chosen, rather than thinking about possible solutions, start the discussion by asking two "reverse" questions:

    A. How can the problem/issue be caused?
    B. How can we achieve the opposite of the intended results?

    Other questions for brainstorming can be discussed by converting them to a "negative" version. A plan of action is then created based off the answers to the questions.

3. The Charette Procedure Brainstorm:

One person on the team is designated as the recorder. Divide the remaining participants into small groups each with a different aspect of the issue as their topic/subject. Each group then discusses the topic/subject for a set amount of time. While the groups are discussing, the recorder comes to each group and takes notes on their as- signed group's ideas. Once the allotted time has ended, the recorder goes to the following group and reports back the ideas from the first group to the next group. He/she then facilitates a discussion of the previous groups' ideas with the current group. The recorder then records the group's new ideas and repeats the process with any remain-ing groups.

Once the recorder has gone through all the small groups, the team converges as a big group. The recorder facilitates a discussion of all of the proposed ideas. The resulting ideas are then prioritized and a plan of action is created prioritized.

4. Post-It Notes

Distribute post-its and have each member of the team think of possible opportunity for change and write it down. Each person puts their post-it on a board and each idea is read aloud and discussed together as a group.

THE ENHANCING CARE PROCESS: Choosing a Solution

Target for Change (write in here):

List up to 3 solutions from the brainstorming session. List the pros and cons for each.
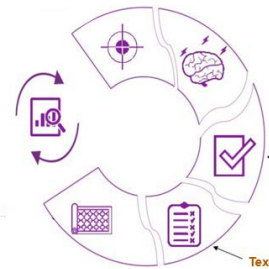
1. _____

   _____

2. _____

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3. _____

   _____

SOLUTION#	PROS	CONS
1		
2		
3		

Check the solution you have chosen to execute, keeping in mind: feasibility, simplicity, measurable, scalability.

The Enhancing Care Process:
Testing a Solution

Target for Change (write in here):

Which solution will be tested?	
What are the goals of the change solution?	
How long will the test take place?	

Define tasks in the testing process.

STAFF MEMBER / TEAM	task

Test Timeline
List key tasks and the expected date by which they should accomplished below.

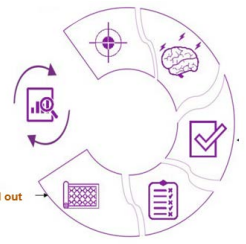| task	DATE

What were the results of the test?: Describe the results

Based on the results will you? check one   Roll out   Tweak and Re-Test   Abandon and Try New solution

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What is your target for change?	
Change solution to be rolled out	

ACTIVITY	COMPLETED	NOTES
Statement of goals and targets distributed to all clinic staff.		
Roles and responsibilities defined and communicated.		
Timeline distributed to all staff.		
Clinic-wide orientation held.		
Training on change and roll out process completed.		
Plans for Tracking and Monitoring data put in place.		

The Enhancing Care Process: Roll Out Checklist

Define responsibilities for individuals during roll out

STAFF MEMBER / TEAM	Responsibility

Roll Out Timeline
List key goals and the expected date by which they should accomplished below.

Tasks to be Completed	DATE

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Worksheet 13

SUSTAINING A CULTURE OF CHANGE

Checklist for Sustaining the Enhancing Care Process

ACTIVITY	COMPLETED	NOTES
A core group of staff are oriented to/comfortable with the enhancing care change management process		
System in place for reconvening the change team as needed.		
Written policies and procedures in place to systematize the Enhancing Care Process.		
Data points for continuous tracking and monitoring identified.		
Process for regular data reporting and monitoring in place.		