The Walk-thru TIP Sheet 

A walk-through is a role play exercise designed to allow staff the opportunity to gain awareness of the process from the recipient's perspective. Staff members take on the role of a recipient, and complete chosen elements such as the intake and assessment process. The lessons learned and information gathered can then be used to develop PDSA change exercises.

Inform your staff. The walk through should be planned, and not a surprise, or a "secret shopper" approach. We want to avoid anything that will damage trust among team members. Even if staff members are on their best behavior, there will still be plenty of opportunities for improvement that will be revealed by the walk-through

Include 2 participants. (One in the role of the client and one in the role of a family member or other support.) Two sets of eyes and ears, from two perspectives, will result in more observations and insights.

Begin your walk-through role play *before* you meet program staff. Phone calls, travel to the appointment, finding the building and office… These are all key pieces of the walk through experience.

Plan your roles. Develop some basic ideas regarding the client role you are playing. What are your concerns? Why are you seeking treatment? How old are you? What is your background? This will help you to maintain your role during the walk through, and will also maximize the opportunities for seeing the program through "new eyes".

Stay in roles. Staff members will sometimes have difficulty with the role play, and will start saying things like "at this point in the interview I would...". Advise them to treat you as they would any recipient.

Take notes. There are many details that will be lost if not noted during the process. These details will be critical to the later analysis of the experience.

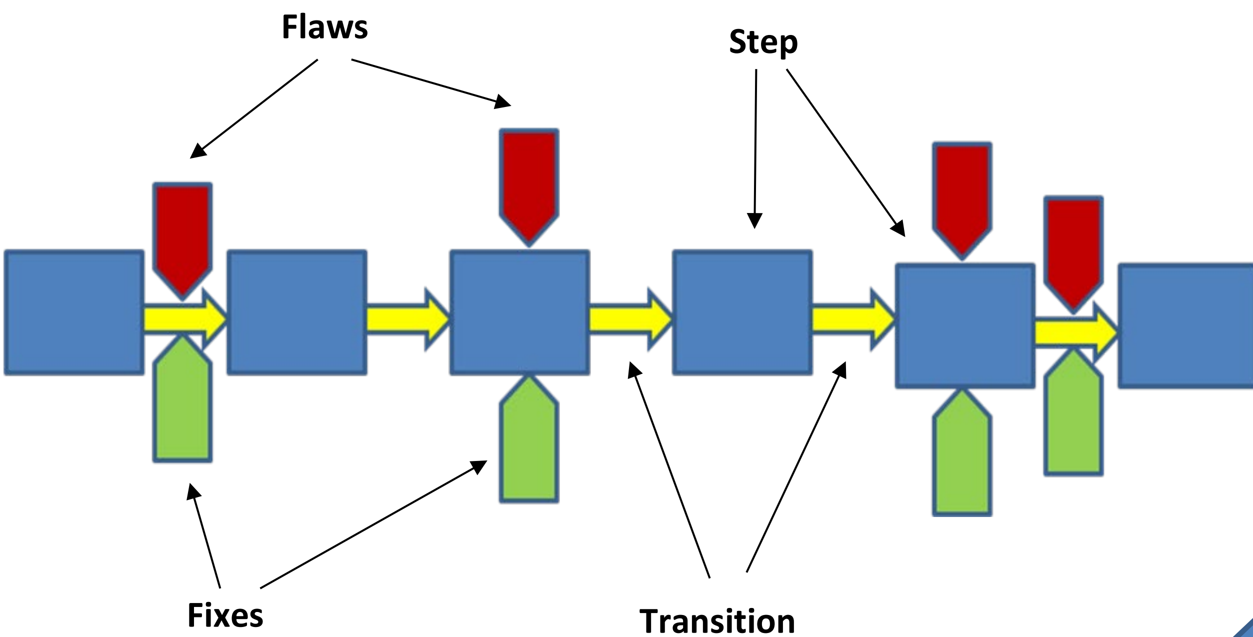
Focus on the emotional experience. Recipients are engaged (or not engaged) by your service based upon their emotional experiences. Be sure to ask yourself at each step "How does this feel?"

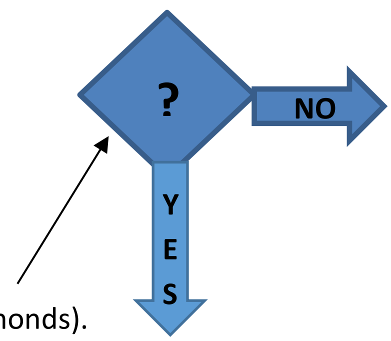
Look for "Value Added" (How could things be better?) With each step of the process, ask yourself the following: Is this step needed? If it is needed, is this step the best that it can be?

Complete the entire process. Make the phone call. Do the paper work. Wait in the waiting room. Do the complete process. These investments will yield a strong return as you review the experience.

Flow Charts

A visual map of the process, designed to show steps and transitions. It is helpful for finding bottle necks, road blocks, and other challenges that prevent a smooth flow in the service process.
These challenges are excellent targets for improvement





Step 1: Draw the first and last step of the process you would like to flow chart.

Step 2: Fill in all the steps of the process (this can include decision steps by using diamonds).

Step 3: Note any Flaws to the process: This step has elements that people complain about, this transition takes too long and leaves people waiting, etc. (Remember that flaws can be located in the steps and/or in the transitions.)

Step 4: Note any Fixes for the Flaws you have defined.

Step 5: Use the flow chart along with other tools to consider next steps for improvement projects.

Tip: draw the steps on post-it notes so that you can move them around as needed.

Nominal Group Technique

A brainstorming technique that will insure team member inclusion
and the generation of a high volume of diverse ideas.

Bad Brainstorming…

- No structure/facilitation, a “free for all”.
- Has no focus, tends to wander across topics.
- Is dominated by the loudest/ most powerful.
- Discourages ideas through judgment or criticism.
- Creates warring factions and dissent.
- Generates the same old opinions.

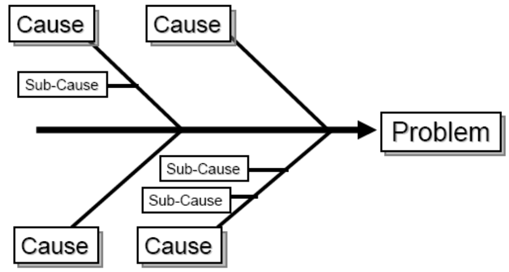
Good Brainstorming…

- Is structured/facilitated by a leader.
- Is focused on a specific question or problem.
- Includes all participants.
- Encourages all ideas.
- Engages individuals in a team effort.
- Generates a wide range of new ideas.

Nominal Group Technique (NGT) is Good Brainstorming

The 4 steps of NGT

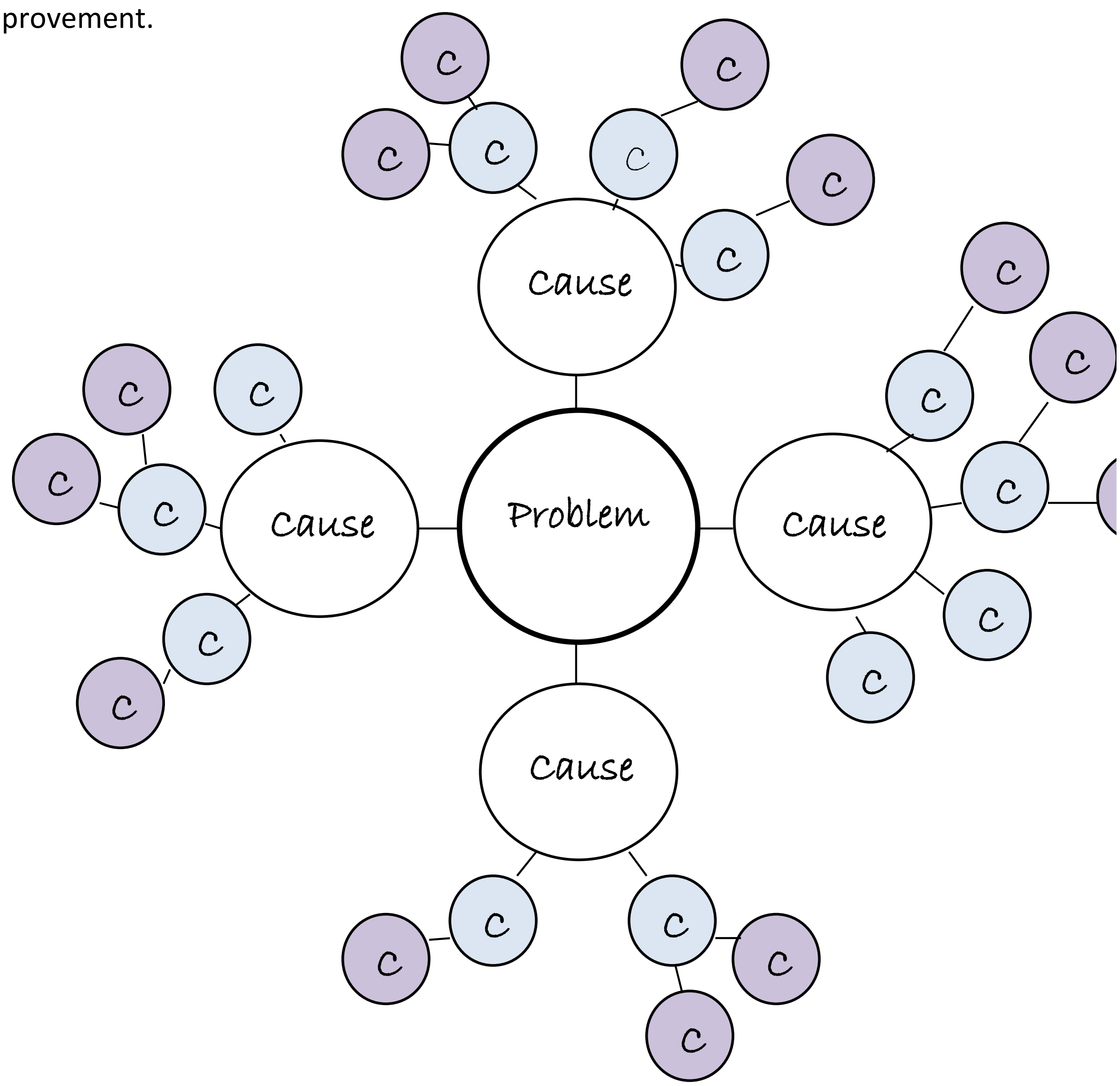
1. **Silent Generation of ideas based on a strong question**: Each individual generates their own list.
   Tip: use post-it notes: one idea per page.
2. **Round Robin Report and Record**: Go around the room, one idea per person, record and number ideas as stated for all to see.
   Tip: Have each person read their idea as it is placed on the board/ sheet for all to see. Tip: Avoid editing the ideas.
3. **Discussion for Clarification:** Questions are asked regarding the ideas shared. Insure that all members understand all ideas.
   Tip: read all the ideas out load.
4. **Voting:** Using sticky dots, a show of hands, or anonymous paper votes. Allow individuals to vote for a number of items that encourages “tough choices”.
   Tip**:** Create simple criteria for voting. E.g. select the ideas that are “doable” and most likely to succeed.
   Tip: allow voting for 10-15 percent of the items, e.g. a list of 20 items might result in allowing 3 votes per member. Ask members to avoid placing all votes on one item.
   Tip: paper voting reduced peer pressure.



Cause & Effect Diagram

Also known as the fishbone or the Ishikawa diagram, it is used to explore the root cause of a problem. Traditionally done in the shape of a fish, the facilitator asks a group to consider a problem, and then asks for the causes of the problem, and the causes of the causes, until all potential root causes have been explored.

Others prefer a **hub and spoke approach**, as it is easier to draw and expand with a group:
Define the problem in a center circle and then draw a cause circle at each of the 4 compass headings. Ask the group to define at least these 4 causes (there may be more) and place them in the circles. Then explore the sub causes of these 4 causes, and continue until all causes have been explored.
The result will be an inventory of granular root causes, some of which will be excellent targets for improvement.



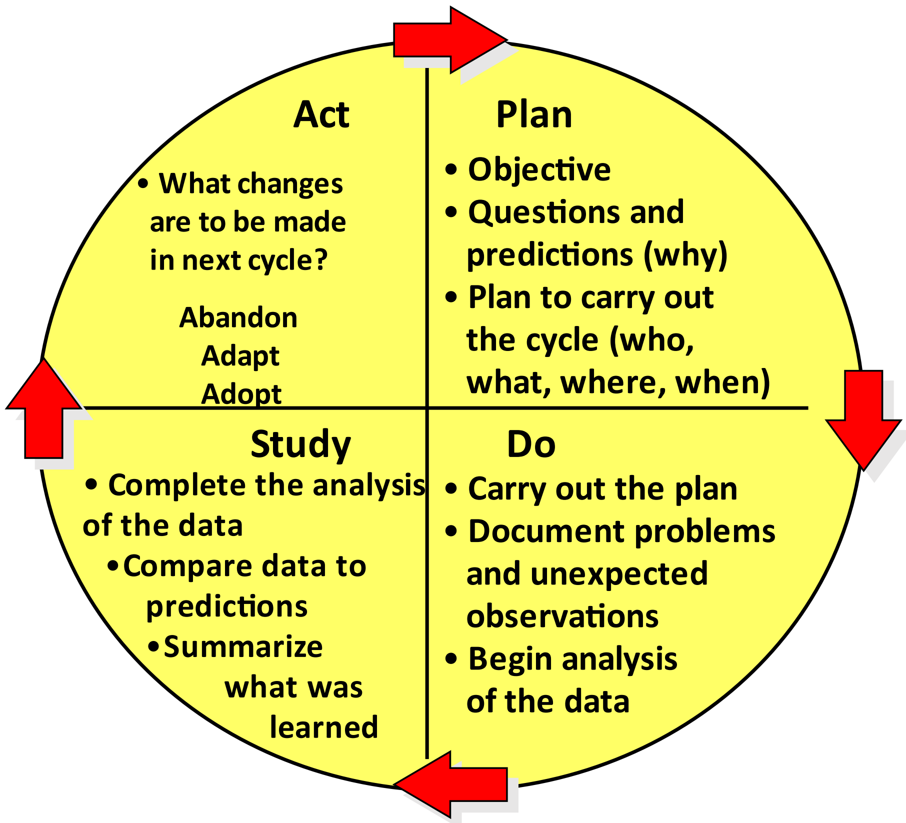
__Why don't people show up for the appointment?__
They forget, they are ambivalent, they feel stigma**, they don't have transportation**...

__Why don't they have transportation?__
They have no car, they are socially isolated, **they don't use the bus...**

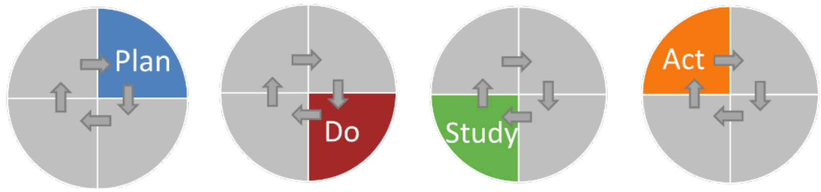
__Why don't they use the bus?__
The bus is confusing, the bus costs too much, the bus schedule is inconvenient, they have children.

So now we have moved from *"Let's fix the no show problem*", to "*Let's do bus training, or provide bus tokens*"... A much more actionable agenda.

RAPID CYCLE PDSA



PDSA Critical Questions



PLAN

1. What is your Goal?
2. What will you test and how will you test it?
3. What questions are you trying to answer with this test?
4. What do you expect will happen and why?
5. How will you measure the results of this test?
6. What data will you need to collect?
7. Where will you collect the data? (What service/ clients?)
8. When will you collect the data? (Start and stop date?)
9. How will you collect the data?
10. Who will collect the data?

DO

1. What are you learning as you go?
2. What is going well?
3. What problems have you had with the test?
4. What has reprised you?
5. What problems have you had collecting data?
6. What is the data showing?

STUDY

1. What does the data tell you?
2. What issues arose during the Do phase?
3. How do the results compare to your prediction?
4. What have you learned?

ACT

1. What did you learn from the study?
2. Did you experience problems?
3. Did you achieve your goal? (In part? In full?)
4. If full achievement, are you ready to **adopt**?
5. If partial, are you ready to **adapt**? (Next cycle ideas?)
6. If failed, are you ready to **abandon**? (Consider a different test?)

Rapid Cycle PDSA
A data driven change implementation model

10 Steps to Change

Pre-Change Steps

STEP 1: Choosing a Goal — *-What do we want to improve?*

STEP 2: Choosing a Change — *-What change will lead to the desired improvement?*

STEP 3: Planning to Measure Progress — *-How will we know if the change is working?*

Change Steps

-What are the resources and activities needed?

STEP 4: **Plan** the Change

-How do we implement our plan?

STEP 5: **Do** the Change

STEP 6: **Study** the Results

STEP 7: **Act** on the Data & Lessons Learned

Step 8: Multiple PDSA Cycles (as needed)

-Can we adjust the change to make further progress toward the goal?

-What have we learned?

-What are our next steps?
(Adopt, Abandon or Adapt the change)

Post-Change Steps

STEP 9: Sustaining the Change — *-How can we maintain the progress?*

STEP 10: Spreading the Change — *-How can we spread a successful change to a new team/ location?*

Adapted from
Langley, et al, NIATx
Workbook, & IHI

A Simple Sequencing of Tools

For

Successful Change implementation

There are many tools that can be used to successfully develop and implement change. The simple sequence below is designed to offer a concise road map that will work with most change projects, using some of the most commonly used and effective tools.

Walk Through	Conduct a role play with staff to understand the experience of your client/ customer
Flow Chart	Draw a flow chart map of the Walk-through experience including all of the steps, decision points, and transitions that you experienced.
NGT	Conduct a Nominal Group Technique brain storm to generate and select change ideas to fix the flaws you found in the Walk Through and Flow Charting.
Change Form	Use the Change Form as a check list to plan out the Change project based upon your change idea.
PDSA	Complete a Rapid Cycle Plan-Do-Study-Act change to try to achieve your goals. Do multiple cycles if needed
Good Job!	Celebrate the results of your change project. (This includes successful results, and lessons learned even if you did not achieve your goal)

NOTES:

Project Charter / Change Form.

Name of Program / Team: ____

1. Change Project Title	
2. Aim Statement (*What is your Goal?)*	
Aim Statement Format	Increase or Decrease **A** from a Baseline of **B** to a Goal of **C** by DATE **D**.
3. Location	
4. Identified start and end dates	Start: End:
5. Name of coalition or program)	
6. What customer population are you trying to help?	
7. Executive Sponsor	
8. Change Leader	
9. Change Team (names and roles)	
10. How will you collect data to measure the impact of change? Who will collect it?	
11. What is the expected impact of this change project? How will the Executive Sponsor know?	

PDSA Cycles (add more as needed)

PDSA Cycle #:		
Cycle Begin Date:		Cycle End Date:
What is the change to be tested?		
P	**PLAN:** Plan the steps to carry out the cycle. Plan for data collection. What is your prediction for the test?	
D	**DO:** Carry out the plan. Document observations. Record data.	
S	**STUDY:** Analyze the data. Compare results to predictions and pre-change data. Summarize what was learned.	
A	**ACT:** Will you adopt, adapt or abandon the change? Why? Move on to next cycle.	

Change Project Form

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Cycle Begin Date:	Cycle End Date:	
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Change Project Form

EVALUATION AND SUSTAINABILIY PLAN

Project Outcomes (complete when project is finished)	
1. What was the project **end date?** (e.g., when you stopped making changes)	
2. What did you **learn?** (e.g., what were some lessons learned? Any unexpected outcomes from your change efforts?)	
3. What was the **financial impact** of this change project? (e.g., Increased volunteer hours; Reduced staff time; etc.)	

Sustainability Plan	
A. Who is the **sustain leader**?	
B. What **changes** do you want to **sustain**?	
C. What **sustain steps** are being taken to ensure that the changes stay in place and that it is not possible to revert back to the old way of doing things?	
D. What is the **target sustain measure**? (i.e., if data drops below this point, the Change Team will intervene to get things back on track.)	
E. What system is in place to effectively **monitor** the **sustain measure**?	

Additional Notes: