

Improvement Project Memo

Participant training objectives:

- To understand the purpose and primary elements of an improvement project memo
- To be able to write a problem statement and improvement goal

Target audience:

Quality improvement committee members, QI project team members, and other staff involved in quality improvement project teams

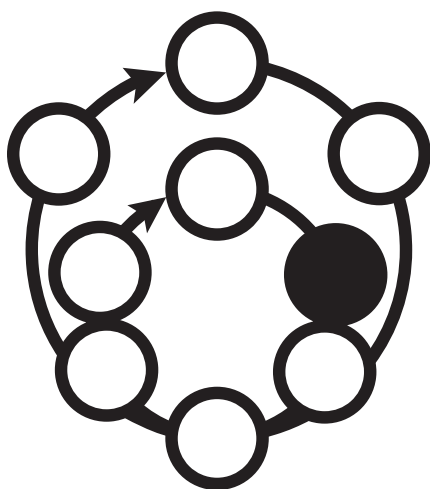
Type of exercise:

Scenario; group exercise, 60 minutes

Key concepts:

An improvement project memo typically includes the following elements:

- Problem statement
- Improvement goal
- Departments/functions involved in the process
- Team leader
- Team members
- Other (resources, authority, frequency of reporting)



The Big Picture:

Quality improvement project teams develop a written outline, an improvement project memo, the blueprint which describes the "who, what, why, and how" of a quality improvement project, namely:

- Who is on the project team
- What will be accomplished during the project
- Why the project is necessary
- How members will function as a team to complete the project

SESSION AT-A-GLANCE	WHO	HOW LONG
1. Welcome, Learning Objectives, Agenda	Facilitator	5 minutes
2. QI Background: Elements of Improvement Project Memo	Facilitator	10 minutes
3. Group Exercise: Scenario Characteristics	Participants	30 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:
 - Sample Improvement Project Memo
 - Scenario
 - Learning Transfer Worksheet
 - Copy of slide presentation
- Flipchart paper and markers
- 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 Sample Improvement Project Memo, Scenario, Learning Transfer Worksheet, and slide presentation for each participant.

Prepare your presentation slides for display:

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

Notes

Improvement Project Memo: Group 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 the purpose and primary elements of an improvement project memo
- Be able to write a problem statement and improvement goal
- Have at least one completed problem statement and improvement goal for a real-life improvement project

Agenda

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

- Presentation of improvement project memo elements
- Group exercise on writing a problem statement and improvement goal
- Learning Transfer Worksheet to try writing problem statements and improvement goals for future or existing projects.

Quality Improvement Background

Distribute the Sample Improvement Memo to each participant for note taking and/or future reference.

Begin by explaining that an improvement project memo is a project blueprint. Teams develop memos to help ensure that all members work toward the same goals and according to a single set of operational guidelines.

State that the most important elements of the memo are the:

Problem statement—problem to be addressed as identified during Step 1 of the project cycle (i.e. Review, collect and analyze data). The statement should quantify the current performance level that team members will work to improve, e.g. “Currently, only 57% of women in the HIV clinic receive annual GYN exams.”

Improvement goal—endpoint or condition toward which members will direct their efforts. When the endpoint is reached and changes are incorporated into the system, the process of improvement is no longer needed. The improvement goal should:

- Use measurable and achievable goals
- Clearly indicate what will be done
- Use action verbs such as increase, decrease, or eliminate

State that additional elements of the memo typically include:

- Departments/functions involved in the process under study
- Team leader
- Team members
- Other (resources, authority, frequency of reporting, ground rules)

Several items in the improvement project memo are provided by the quality committee, such as project length, constraints, or limitations. Those should be noted in the memo. In addition to operational guidelines, the quality committee usually assigns the team leader and the core team members.

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 Scenario to each participant and provide directions for completing the exercise:

- Read the scenario. (5 minutes)
- As a team, complete the problem statement and improvement goal. (15 minutes)

Remain available to answer questions and facilitate the process. Assist teams who have problems getting started or become stuck on a particular point.

Reporting Back

Call time and ask one team to provide the problem statement. Write it on the flipchart and ask the remaining teams if they have a different statement. Discuss the differences, if any, referring to your answer key for guidance. Repeat the process for the improvement goal.



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 a problem statement and improvement goal for one project.



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:

- To understand the purpose and primary elements of an improvement project memo
- To be able to write a problem statement and improvement goal
- To have at least one completed problem statement and improvement goal for an existing or future project

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

Improvement Project Memo: Scenario

Instructions:

Using the form provided, write a problem statement and improvement goal based on the following data.

Background

The Medical Director of an HIV care facility recently reviewed several cases brought to her attention. Three patients who had CD4 counts less than 200 were not on PCP prophylaxis. After reminding the entire medical staff of the prophylaxis guidelines through a memo, a fourth case was identified. The quality committee decides to form a quality improvement team to address the issue. The team collects the following baseline data:

YEAR	% OF PATIENTS (WITH CD4 LESS THAN 200 AND ON PCP PROPHYLAXIS)	STATE - WIDE AVERAGE IN %
2001	94%	88%
2002	96%	90%
2003	95%	91%
2004	95%	91%
2005	65%	92%

Improvement Project Memo

Date: _____

Indicator: _____

Problem Statement: _____

Improvement Goal: _____

Departments/functions involved in the process under study:

Clinician, HIV clinic

Nurse

Receptionist

Lab representative

MIS representative

Team member:

Ann Cavanaugh, CSW (team leader)

Peter Brown

Paul Sabo, MD

Santiago Rodriguez

Helen Kearney

Amy March, RN

Other: (resources, authority, frequency of reporting, ground rules)

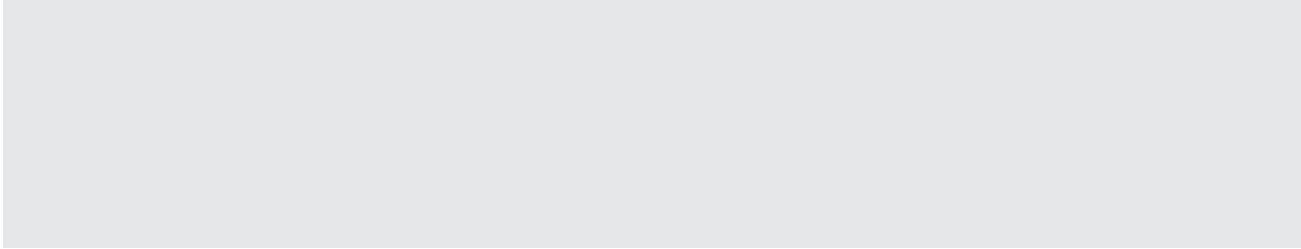
Team will be given time to meet.

There's money for supplies or other similar expenses, but not for additional staff.

Mac Martin will be available to help with data analysis.

Team members should give a verbal report at the next quality committee meeting.

All team members should be on time and no excuses.



Improvement Project Memo: Learning Transfer Worksheet

Instructions:

Think of one or more improvement projects which are either underway or could be underway in the future. Using the information from today's session, write down the project name and a corresponding problem statement and improvement goal. Estimate quantitative data, if needed.

PROJECT	PROBLEM STATEMENT	IMPROVEMENT GOAL

Improvement Project Memo

Improvement Project Memo: Answer Key

Date: August 1, 2006

Indicator: PCP prophylaxis

Problem Statement: Currently, only 65% of patients with CD4 count less than 200 receive appropriate PCP prophylaxis, compared to the state-wide average of 92%. In the last year the performance rate declined by 31%.

Improvement Goal: The team will work to improve the clinic's performance on this important prevention measure. The team should focus on increasing the number of patients with CD4 count less than 200 receiving appropriate PCP prophylaxis to 95% and above.

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Nurse

Receptionist

Lab representative

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