Appendix

Evaluating Quality Improvement Project Team Meetings

		Strongly DisAgree	Disagree	Neutral	Agree	Strongly Agree
1	The meeting began on time with all members present.					
2	There was a published agenda.					
3	All team members completed their assignments.					
4	There were follow-up discussions about agreements made in the previous meeting.					
5	The team successfully followed and completed the agenda within the allotted time.					
6	The team followed the quality improvement process.					
7	The majority of time was spent on issues related to the project.					
8	Participants reacted appropriately to conflict					
9	There was equal participation among all team members.					
10	Information was presented clearly and concisely.					
11	The results of the meeting reflect progress toward the accomplishment of the team's mission.					
12	A summary of action steps or decisions was distributed following your meeting.					
13	This meeting was an improvement over the last team meeting.					
14	Areas that need improvement include:					

Participant-Led Exercise Feedback

Presenter/Facilitator _____ Exercise Topic: _____

Please provide specific, detailed feedback on what went well and what could be improved. Give your ideas of how the facilitator could improve and what could be improved. Give your ideas of how the facilitator could improve and provide alternative suggestions for presenting this topic.

Specific techniques I found useful (and how they helped):

Overall strengths (consider preparation, clarity, timing, pace, involvement of participants, use of audio/visual aids, etc.):

Opportunities for improvement (consider preparation, clarity, timing, pace, involvement of participants, use of audio/visual aids, etc.):

Additional comments or ideas:

Thank you for providing your clear and honest feedback!

2 books Preparation Training (handwritten)

		Background Resources for Participant-Led Assignments							
Assign-ment #	Assignment Topic	Juran on Quality Improvement (Videotape Series)		Quality Improvement in Health Care			Juran's Breakthrough for Quality Improvement Teams		
		Tape/Chapter	Pages	Book*	Chapter	Pages	Book*	Chapter	Pages
1	Nominate projects	1 and 2	all 7-8	P	4	1-5	P	4	1-5
2	Evaluate projects	2	1-10	P	4	6-8	P	4	6-8
3	Select project Is it quality improvement>	2	8-13	P	4	9-13	P	4	9-11
4	Prepare a mission statement	4 and 5	1-10 9-14	T	1	5-12	T	1	5-13
5	Select a team and verify the mission	4 and 5	1-10 9-14	T	1	13-20	T	1	14-21
6	Analyze symptoms >Definitions >Measurement	7	1-3	T	2	3-16	T	2	3-9
	Analyze symptoms >Boundaries >Vital few Confirm mission	7 and 2	1-13 2-7	T	2	17-20	T	2	10-20
7	Formulate theories	7	3-6	T	2	21-27	T	2	21-27
8	Test theories >Decide which to test >Plan data collection	7 and 8	7-14 1-4	T	2	28-30 32-34	T	2	28-30
	Test theories >Analyze results	11	all	T	2	30-31 35-39	T	2	30-31
9	Identify root cause	8	all	T	2	40	T	2	40

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Appendix

Assign ment #	Assignment Topic	Background Resources for Participant-Led Assignments								
		Juran on Quality Improvement (Videotape Series)		Quality Improvement in Health Care			Juran's Breakthrough for Quality Improvement Teams		
		Tape/Chapter	Pages	Book*	Chapter	Pages	Book*	Chapter	Pages
10	Evaluate alternaitve remedies	12	1-4	T	3	5-9	T	3	5-9
	Design remedy	12	4-15	T	3	10-18	T	3	10-18
	Design controls	13 and 16	1-3 7-15 all	T	3	10-30	T	3	19-30
11	Design for culture	14	9-19	T	3	31-32	T	3	31-34
12	Prove effectiveness	12 and 14	1-18 1-4	T	3	35	T	3	35
	Implement	16	1-5	T	3	36-37	T	3	36-37

* P = Team Preparation Workbook
  T = Team Training Workbook

Participant-Led Exercise Assignment Matrix

Participant-Led Assignent	Participant Name	Exercise Schedule
1. Nominate Projects	1	Tuesday
2. Evaluate Projects	2	Tuesday
3. Select a Project and Ask: Is it Quality Improvement?	3. 4.	Tuesday
4. Prepare Mission Statement	5. 6.	Tuesday or Wednesday
5. Select Team and Verify Mission	7	Wednesday
6. Analyze Symptoms Confirm and Modify Mission	8. 9.	Wednesday
7. Formulate Theories	10. 11.	Wednesday

8. Test Theories
   -decide which
   -plan data collection
   -analyze results
	12.
	13.
		Wednesday or Thursday

9. Identify Root Cause	14	Thursday

10. Evaluate Alternative
    Remedies
    -design remedy
    -design controls
	15.
	16.
		Thursday

11. Design for Culture	17. 18.	Thursday
12. Prove Effectiveness -implement	19. 20.	Thursday

Participant-Led Quality Improvement Process
Exercise/Discussion Structure

Agenda Item	Time	Responsibility
Introduce the assigned quality improvement substep	3 minutes	Assigned Facilitator
Lead exercise related to quality improvement substep	10 minutes	Assigned Facilitator
Conclude/wrap up	2 minutes	Assigned Facilitator

Whole Group Debrief:
Lessons Learned
(Positive Feedback):
  -- Facilitation Skills
  -- Quality Improvement Process
 	
Questions/Concerns
(Improvement Opportunities):
  -- Facilitation Skills
  -- Quality Improvement Process
	5 minutes	Instructor facilitates with three assigned team members' assistance

Summary of JQIP Learning Points	5 minutes	Instructor

Quality Council Review Structure

Session 1	
Team 1	Analyze Symptom/Modify the Mission
Team 2	Quality Council
Team 3	Observe
Full Group Debrief	- What did the Quality Council do? - How did the Quality Council do it? - What did the Quality Council do that inhibited the team's performance?
Session 2	
Team 2	Root Cause(s)
Team 3	Quality Council
Team 1	Observe
Full Group Debrief	- What did the Quality Council do? - How did the Quality Council do it? - What did the Quality Council do that inhibited the team's performance?
Session 3	
Team 3	Remedy
Team 1	Quality Council
Team 2	Observe
Full Group Debrief	- What did the Quality Council do? - How did the Quality Council do it? - What did the Quality Council do that inhibited the team's performance?

Case Team Meeting Structure

Agenda Item	Time	Responsibility
Read Case	Varies (2-7) minutes	All Team Members and Facilitator
Opening	1 minute	Team Leader
Answer Case Questions	Varies (15-25) minutes	Team Leader and Team Members
Closing	1 minute	Team Leader
Fill out forms: - Team members fill out Team Meeting Evaluation Forms - Facilitator fills out Team Leader Evaluation Forms - Team Leader fills out Facilitator Assessment	2 minutes (Concurrent) (Concurrent)	Team Members Facilitator Team Leader
Meeting Evaluation - Team Members discuss key issues from IndeX team meeting	3 minutes	Team Members and Facilitator
Feedback to Team Leader on Team Interaction	3 minutes	Facilitator
Full Group Debrief	15 minutes	Instructor

Project Nomination:	
Criteria for Selecting a Project	**Does the Potential Project Meet These Criteria?**
Chronic-How chronic is the problem? Explain.	
Significance-Will the results be significant? Explain.	
Size-Is the project manageable size? Explain.	
Measure of Potential Impact-Will the project help retain and attract customers, reduce costs of poor quality, provide return on investment, enhance customer satisfaction, and enhance employee satisfaction?	
Urgency-Is the project urgent to the organization? Explain.	
Risk-Is it risky? Explain.	
Potential Resistance to Change-Might the project create resistance to change? Explain.	
The Project Should Be a Sure Winner-Are there any obstacles? Explain.	
The Problem Must Be Measureable-Is the problem measureable? Explain.	

Project Nomination 1: The State wants the DMV to reduce its overhead costs while increasing its productivity.

Criteria for Selecting a Project	Does the Potential Project Meet These Criteria?
Chronic-How chronic is the problem? Explain.	
Significance-Will the results be significant? Explain.	
Size-Is the project manageable size? Explain.	
Measure of Potential Impact-Will the project help retain and attract customers, reduce costs of poor quality, provide return on investment, enhance customer satisfaction, and enhance employee satisfaction?	
Urgency-Is the project urgent to the organization? Explain.	
Risk-Is it risky? Explain.	
Potential Resistance to Change-Might the project create resistance to change? Explain.	
The Project Should Be a Sure Winner-Are there any obstacles? Explain.	
The Problem Must Be Measureable-Is the problem measureable? Explain.	

Project Nomination 2: The process for renewing a license is ineffective and inefficient. The process is time consuming, requiring that a customer stand in several lines for different clerks to complete the renewal process.

Criteria for Selecting a Project	Does the Potential Project Meet These Criteria?
Chronic-How chronic is the problem? Explain.	
Significance-Will the results be significant? Explain.	
Size-Is the project manageable size? Explain.	
Measure of Potential Impact-Will the project help retain and attract customers, reduce costs of poor quality, provide return on investment, enhance customer satisfaction, and enhance employee satisfaction?	
Urgency-Is the project urgent to the organization? Explain.	
Risk-Is it risky? Explain.	
Potential Resistance to Change-Might the project create resistance to change? Explain.	
The Project Should Be a Sure Winner-Are there any obstacles? Explain.	
The Problem Must Be Measureable-Is the problem measureable? Explain.	

Project Nomination 3: Customers do not bring the correct information or forms with them from home to complete the license renewal process, causing a return visit to the DMV.

Criteria for Selecting a Project	Does the Potential Project Meet These Criteria?
Chronic-How chronic is the problem? Explain.	
Significance-Will the results be significant? Explain.	
Size-Is the project manageable size? Explain.	
Measure of Potential Impact-Will the project help retain and attract customers, reduce costs of poor quality, provide return on investment, enhance customer satisfaction, and enhance employee satisfaction?	
Urgency-Is the project urgent to the organization? Explain.	
Risk-Is it risky? Explain.	
Potential Resistance to Change-Might the project create resistance to change? Explain.	
The Project Should Be a Sure Winner-Are there any obstacles? Explain.	
The Problem Must Be Measureable-Is the problem measureable? Explain.	

Learning Contracts and Action Planning

Learning Contract

At the end of **day one** of the Facilitating and Leading Quality Improvement Teams, please complete the learning contract below. This will assure that you personally apply the program content to your own quality improvement project team.

1   My key learnings from today's workshop include:

2   I can apply this knowledge and skills in the following ways:

3   I plan to further develop my skills in this area:

4   The following individuals can help me as I apply this knowledge and skills:

Learning Contract

At the end of **day two** of the Facilitating and Leading Quality Improvement Teams, please complete the learning contract below. This will assure that you personally apply the program content to your own quality improvement project team.

1   My key learnings from today's workshop include:

2   I can apply this knowledge and skills in the following ways:

3   I plan to further develop my skills in this area:

4   The following individuals can help me as I apply this knowledge and skills:

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Learning Contract

At the end of **day three** of the Facilitating and Leading Quality Improvement Teams, please complete the learning contract below. This will assure that you personally apply the program content to your own quality improvement project team.

1   My key learnings from today's workshop include:

2   I can apply this knowledge and skills in the following ways:

3   I plan to further develop my skills in this area:

4   The following individuals can help me as I apply this knowledge and skills:

Learning Contract

At the end of **day four** of the Facilitating and Leading Quality Improvement Teams, please complete the learning contract below. This will assure that you personally apply the program content to your own quality improvement project team.

1   My key learnings from today's workshop include:

2   I can apply this knowledge and skills in the following ways:

3   I plan to further develop my skills in this area:

4   The following individuals can help me as I apply this knowledge and skills:

Learning Contract

At the end of **day five** of the Facilitating and Leading Quality Improvement Teams, please complete the learning contract below. This will assure that you personally apply the program content to your own quality improvement project team.

1   My key learnings from today's workshop include:

2   I can apply this knowledge and skills in the following ways:

3   I plan to further develop my skills in this area:

4   The following individuals can help me as I apply this knowledge and skills:

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Action Planning

At the end of day five, please review all of the previous learning contracts in preparation for developing an action plan for implementation back at your organization.

Please fill out the planning matrix below.

Facilitating and leading Quality Improvement Teams
Action Plan

Action Required	Responsibility	Resources Required	Target Date
1.			
2.			
3.			
4.			

Avidco: A Quality Improvement Story

Questions for Team 1

1   What information and data did the Avidco quality improvement team have available to help them to evaluate the project?

2   Is the Avidco project truly a quality improvement project versus quality planning or quality control?

3.   What is the mission statement that was given to the Avidco quality improvement team by a representative of the Quality Council, the Vice President of Sales and Marketing?

4   Does the Avidco mission statement meet the criteria of a well-written mission statement: specific, observable, measureable, and manageable?

5   What should the quality improvement team do when it receives a mission statement that does not meet the criteria of a proper mission statement?

6   How could the quality improvement team modify the mission?

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7   What did the Avidco quality improvement team do to analyze the symptoms of the problem?

8   What did the Avidco quality improvement team learn when it measured the symptoms, i.e., the number of late proposals each month?

9   What did the Avidco quality improvement team discover while creating a flow diagram of the proposal development process?

— Actually conducted

— Complexity (different than original intent)

10   What did the Avidco quality improvement team do to concentrate on the vital few causes of lateness?

By analyzing the amount of time it took for various departments to complete their sections of the proposal, they were able to focus on the R&D department which took dramatically longer than other departments. They further refined their efforts to "complex" proposals because then took the most time.

→ Construction Projects "new" + "modified" categories only

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Avidco: A Quality Improvement Story

Questions for Team 2

1. How did the Avidco quality improvement team modify the mission given to them by the Quality Council? Did your team agree that this new mission statement was realistic? A sufficient stretch?

2. What was the procedure used by the Avidco quality improvement team to generate theories about the root cause(s) of biggest time wasters?

3. What theory(s) did the Avidco quality improvement team decide to test? Where did they collect the data needed to test the theory?

4. What can we tell from the bar chart: Proposals—Number of Processing Days? What can't we tell from the bar chart?

5. Let's look at each of the histograms the quality improvement team developed to answer the questions: How long (range of days) does a proposal stay in each department before being returned to PMD for distribution to the client? What theories are supported by results? What theories are eliminated by results? Are any new theories suggested by the results?

6. The Avidco quality improvement team learned that complex proposals required extensive research, adding to the length of time it took to develop a proposal. A team equated length of a proposal with complexity and developed a scatter diagram. What does the scatter diagram suggest?

Avidco: A Quality Improvement Story

Questions for Team 3

1   What were the alternative remedies considered by the Avidco team?

2   The team evaluated each of the alternative remedies against the criteria to evaluate remedies. What were the results that the team expected from the chosen remedies as a result of their analysis?

3   It is important to consider all those affected by the remedy. Who did the Avidco team include in the process of redesigning the proposal development process?

4   How did the Avidco quality improvement team overcome resistance to change?

5   How did the Avidco quality improvement team test the effectiveness of the remedy?

6   How did the team assure that the remedy was effective over time?

7   What should be done if the number of late proposals starts climbing again?

Team Interaction Skills: Role Plays

This packet will serve a team of three or four participants through all three rounds of role play.

For a team of three, the distribution is as follows:

Participant	Round 1	Round 2	Round 3
A	Facilitator	Observer	Team Member
B	Observer	Team Member	Facilitator
C	Team Member	Facilitator	Observer

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For a team of four, Round 3 will not have an Observer. The distribution is as follows.

Participant	Round 1	Round 2	Round 3
A	Facilitator	Observer	Team Member
B	Observer	Team Member	Facilitator
C	Team Member	Observer	Facilitator
D	Observer	Facilitator	Team Member

Designate participants in your group as A through C (or D as the case may be) by writing names next to the appropriate letter in the table, distribute the role plays, and have fun!