



learning  
lab

# Learning Lab Curriculum

Your Guide for Participation in the Advanced QI Learning Lab

Learning Lab: Advanced

Session: May 2021

Faculty: Chuck Kolesar, Justin Britanik, Susan Weigl

Version: 1.0

Developed by the  
HRSA Ryan White HIV/AIDS Program  
Center for Quality Improvement & Innovation (CQII)

New York State Department of Health AIDS Institute  
For Health Resources and Services Administration HIV/AIDS Bureau



[WWW.CQII.ORG](http://WWW.CQII.ORG)



***Learning Lab Curriculum:  
Your Guide for Participation in the Advanced QI Learning Lab***

**Table of Contents**

*A) Learning Lab Overview* ..... 3

    Introduction to Learning Lab ..... 3

    Application Process ..... 3

    Expectations for Learning Lab Participants ..... 4

*B) Advanced Learning Lab* ..... 5

    Advanced Learning Lab Overview ..... 5

    Description ..... 5

    Learning Objectives ..... 6

    Outputs/Deliverables ..... 6

    Time Commitment ..... 6

    Target Audience(s) ..... 6

    Learning Lab Faculty and Key Contacts ..... 6

    Technologies ..... 9

    Using a Webcam ..... 9

*C) Session Dates and Agenda* ..... 10

    Session Dates ..... 10

    Session Agenda and Homework Assignments ..... 10

*D) Frequently Asked Questions* ..... 13



## **A) Learning Lab Overview**

Welcome to the Advanced QI Learning Lab! We hope this Curriculum provides you with a detailed outline of expectations to successfully complete this Lab, session dates, agenda topics for each session and homework assignments, Zoom links, and any other pertinent information.

### ***Introduction to Learning Lab***

The Center for Quality Improvement & Innovation (CQII) has a rich history of actively engaging HRSA Ryan White HIV/AIDS Program (RWHAP)-funded recipients/subrecipients and people with HIV (PWH) in in-person and virtual training efforts to build their quality improvement (QI) capacity. Building upon CQII's successful efforts, CQII has launched a virtual QI training program, called the QI Learning Lab, in 2021. It is comprised of multiple independent Labs categorized by various QI proficiency levels: Beginner, Intermediate, Advanced, Expert, and Experience Based Co-Design (EBCD).

Each rigorous Learning Lab is highly interactive and uses a case-based learning approach with real-world HIV examples addressing gaps along the HIV care continuum. Each lasts 3-months consisting of six 90-minute virtual sessions every two weeks, participant homework assignments, and feedback by Lab faculty members and peer participants. Participants apply for the most relevant Lab based on their individualized training needs. Each Lab will be offered independently every four months on a pre-determined annual schedule.

### ***Application Process***

HIV providers at RWHAP-funded agencies and PWH apply for an upcoming Lab via CQII's online registration portal (SurveyMonkey). PWH are encouraged to apply for any Lab, including the Beginner, Intermediate, Advanced, and Expert Lab, as long as they meet the minimum set of expectations and have the ability to complete all deliverables.

The online application form requests basic demographic and contact information about the learner and their HIV agency, the individual commitment to complete all Lab assignments, agency leadership support, involvement in current and past QI projects, and improvement goals for completing the training. Advanced and Expert Labs applicants are asked to submit additional supporting documents (e.g., recent QI storyboards) to further evaluate their past experiences. After being accepted, participants receive the Lab-specific Curriculum, which outlines expectations, session dates, pre-work assignments, Zoom links, assignment due dates, and any other pertinent information.

To maximize the learning outcome, this Learning Lab is limited to up to 15 participating agencies, representing a minimum of 5 agencies. Each agency is encouraged to sign-up as a cross-functional team, which includes a data person and an individual with lived experiences. Participants from the same agency are encouraged to participate if they work on the same QI team and project. If participants from the same agency work on two different QI projects, they will count as two participating agencies. If more than 15 agencies sign-up, CQII will automatically enroll them in the



next Lab, starting four months later. Waiting lists are maintained for each Lab in case an agency drops out before the start of the Lab.

### ***Expectations for Learning Lab Participants***

Each Learning Lab is a rigorous virtual training program with six 90-minute sessions that uses a case-based learning approach with real-world HIV examples and sufficient time for discussions with Lab faculty members and exchanges with other participants.

Each participant is expected to actively participate in all Lab sessions and complete all deliverables. The course design requires participants:

- **Application**: to accurately complete the online application form and participate in any pre-work assessments. If multiple staff members of the same agency jointly apply to participate as one QI team in the Advanced Lab, please ask each QI team member to independently complete the registration survey.
- **Session Attendance**: to participate in all six 90-minute sessions, including the pre-work call to orient participants to the Lab expectations.
- **Homework Assignments**: to prepare your homework assignments and report back at every session. If participants miss a session, they have access to the recording and are provided with instructions on any assignments that need to be completed.
- **QI Project**: to launch a QI project addressing gaps along the HIV care continuum within the context of a RWHAP agency.
- **Post-Lab Session**: to report back your QI project efforts. A post-training session is scheduled 6 months after the first session for the final report-back of your QI project to ensure the application of the training content in RWHAP-funded agencies.
- **Evaluation Efforts**: to participate in any evaluation efforts by CQII and its external evaluator (UCSF) to demonstrate the increased QI capacity building among participants and the effectiveness of QI efforts as evidenced by the successful implementation of your QI projects. A post-Lab QI competency tests and post-session surveys are routinely conducted. All registration information, assignment submissions, and attendance information are tracked and routinely reviewed by the faculty and CQII staff.



Learn More |

[Learning Lab Concept Paper](#)  
[CQII Learning Lab Website](#)  
[Application Link](#)



Adv

learning  
lab

## **B) Advanced Learning Lab**

### *Advanced Learning Lab Overview*

The Advanced QI 101 Learning Lab is designed to reinforce the implementation of robust QI projects with clear documentation of measurable improvements that result in improved health outcomes. The purpose of this Lab is to increase the in-depth understanding of advanced QI methodologies and tools, and to create a pool of effective QI leaders in the community with advanced QI skills.

#### Advanced Learning Lab Overview

##### Purpose

- To reinforce the implementation of robust QI projects with clear documentation of measurable improvements that result in improved health outcomes
- To increase the in-depth understanding of advanced QI methodologies and tools
- To building effective QI leaders in the community with advanced QI skills

##### Target Audiences

- HIV providers or people with HIV (PWH) with strong QI proficiency
- Individuals with responsibility for the implementation of local QI projects
- Quality managers with past successful experience in applying QI principles and methodology to improving patient care

### *Description*

The Advanced QI Learning Lab reinforces the implementation of robust QI projects with clear documentation of measurable improvements that result in improved viral suppression or other health outcomes. In order to support improvements in health outcomes across the spectrum of HIV care providers, Ryan White HIV/AIDS Program (RWHAP)-funded providers and people with HIV (PWH) require a more in-depth understanding of advanced QI methodologies and tools. Over time, this Learning Lab builds a cadre of effective QI leaders in the provider and PWH community with advanced QI skills.

To access detailed information about other CQII Learning Labs | [CQII Learning Lab Website](#)



### ***Learning Objectives***

By the end of this Learning Lab, participants will be able to lead their QI project team to successful completion of a QI project by

- Applying QI principles and models
- Demonstrating an understanding of each step in the QI project process through peer exchange of use of QI tools
- Documenting the team's QI project via DMAIC Project Charter and storyboards
- Achieving their improvement goals

### ***Outputs/Deliverables***

- A completed QI project that utilizes key foundational tools, such as the A3 tool, SIPOC diagram
- Effective use of advanced QI tools, such as Value Stream Maps and VOC Techniques, to identify areas for improvement
- A gap analysis by assessing collected data and how these results compare to an ideal state
- A completed QI storyboard with a focus on dissemination of results and sustainability

### ***Time Commitment***

CQII estimates that each participant will spend approximately 25 to 35 hours over the course of the entire Learning Lab:

- Application: 1 hour (one time)
- Session Attendance: 4 hours a month
- Homework Assignments and QI Project: 3-6 hours a month
- Post-Lab Session: 2-3 hours for preparation and participation for this session
- Evaluation Efforts: 1 hour (one time)

### ***Target Audience(s)***

This Lab addresses the needs of providers and PWH at RWHAP-funded recipients/subrecipients with intermediate and advanced QI proficiencies who are responsible for the implementation of local QI projects and have past successful experiences in applying QI principles and methodology to improving patient care. Thus, they are ready for more in-depth training.

### ***Learning Lab Faculty and Key Contacts***

Each Lab is supported by an assigned faculty, who leads the sessions, facilitates discussions, reviews all assignments, and provides feedback to participants before and during each session. The faculty includes a CQII staff, one to two QI content experts, and assigned support staff.

Here are the biographical sketches of the faculty:

**Charles Kolesar, RN, MPH**, is a healthcare professional with over 25 years of experience in clinical care and health care operations – with a focus on HIV care and prevention, global health, and QI.



Chuck began his work in HIV in the early 1990's with the Pediatric AIDS Clinical Trials Group at St. Jude Children's Research Hospital in Memphis, TN as a pediatric oncology nurse specialist. After several years at St. Jude, he served as the charge nurse of the emergency department in a busy urban hospital. In the late 1990's, Chuck took his combined experience in HIV care, hospice, and emergency medicine to Haiti, working with multiple organizations to strengthen, align, and integrate existing resources for medical care. He later founded a nonprofit organization dedicated to serving poor rural children in the region. In 2015, inspired by his experiences in HIV care and QI in Haiti, he decided to work with the RWHAP in the Memphis TGA as a QI manager, simultaneously serving as Project Director for an innovative Community Health Worker program. He recently joined CQII as the Manager of Communities of Learning and has been charged with guiding and managing the effective implementation of the end+disparities ECHO Collaborative.

**Justin Britanik** is an experienced healthcare professional with a background in quality management in both primary care and public health settings. As a certified Lean Six Sigma practitioner, he has a passion for helping teams reach their project goals by improving processes through removing waste and reducing variation. He is responsible for regional collaboration, performance measurement, leading and convening QI activities, and sustaining internal CQM infrastructure in the Washington, DC metropolitan area. Currently, he has the pleasure of working with over 40 subrecipients to improve service delivery, client satisfaction, and health outcomes. His favorite part of working in quality improvement is seeing teams and individuals reach their full potential and empowering them to embrace data in order to take on difficult challenges with precision and innovation. Previously, he managed the Ryan White HIV/AIDS Program at a large Part C funded Federally Qualified Health Centers (FQHC) in Maryland. He has been working to improve the quality of care for those living with HIV for over a decade. Justin has been part of the CQII consultant quality coach team since 2016. In his consulting work he shares his expertise by coaching regional quality groups to do improvement work and sustain capacity in their quality management programs. He has also worked with a variety of clients including State and Local health departments, Hospital systems, FQHC and other Community Health Centers (CHC) and Community Based Organizations. This work has also afforded him the opportunity to participate in numerous learning collaboratives across the nation using the Institute for Healthcare Improvement (IHI) Breakthrough model. He was actively involved in the CQII end+disparities ECHO learning collaborative as both a coach and a participant. He has served as a member of the DC EMA Cross-Parts Quality Collaborative Response Team since its inception in 2011 and has served as the team leader for a majority of that time. Justin has a proven track record of mentoring and coaching high-performing teams through all phases of quality improvement including: building infrastructure, training in person and virtually, project management, producing useful data and applying analytical techniques to inform tactical decisions, as well as managing change and sustaining improvements.

**Susan Weigl**, Healthcare and Non-Profit Management Consultant: Susan began her career in research at Rockefeller University's Immunology and Cellular Physiology Department. She was also one of the first female volunteers at the Community Health Project in New York City, a volunteer-staffed episodic program, housing the nation's first community-based HIV clinic. Her experience since spans nearly thirty years in research, advocacy, and public health care administration, as well as in the delivery, evaluation and improvement of healthcare and supportive services. For 15 years, first, as the Director of Continuous Quality Improvement and subsequently as Associate Executive Director, at the Callen-Lorde Community Health Center – New York City's first federally qualified health center dedicated to the LGBTQ communities and people living with HIV/AIDS - Susan had the opportunity to collaborate with individuals and teams from various disciplines and community arenas. In addition, as a consultant to the non-profit and public health sectors, she has provided extensive technical assistance and capacity building expertise to a diverse range of supportive service and medical providers. She uses a framework for quality management that includes three primary components – performance measurement, quality management infrastructure, and quality improvement. This work includes training on proven quality



management and quality improvement tools and methodology, on-site and virtual technical assistance, and development, implementation and facilitation of collaborative quality learning networks –designed to accelerate improvements and spread best practices in HIV care and outcomes. Susan’s work spans across multiple systems from individual agencies, staff and consumers, to city, county, state and national learning collaboratives and networks all aimed at ending the HIV epidemic. Her current work focuses on priority areas including – measuring and eliminating HIV related and intersectional stigma and disparities in access to and outcomes in medical care and services; creating metrics and systems for the implementation and evaluation of interventions addressing social determinants of health (including food security, nutritional health and housing stability), reducing emergency department utilization and improving outcomes in HIV medical care; improving the integration of substance use treatment and harm reduction services for people living with HIV via a network level approach; expedited access to and ongoing integration of behavioral health services within a statewide system of care for people living with both a co-occurring HIV and behavioral health diagnosis. Susan holds a certificate in Executive Non-Profit Management from Columbia University Graduate School of Business and a Bachelor of Science degree in Biology and is an Institute for Healthcare Improvement (IHI) trained Quality Improvement Advisor.

Learning Lab Contacts			
Faculty			
Chuck Kolesar	Manager of Communities of Learning, CQII	<a href="mailto:Charles.Kolesar@health.ny.gov">Charles.Kolesar@health.ny.gov</a>	212-417-4768
Justin Britanik	Consultant, CQII	<a href="mailto:justin@cqii.org">justin@cqii.org</a>	202-671-4844
Susan Weigl	QI Coach	<a href="mailto:sweigl@yahoo.com">sweigl@yahoo.com</a>	929-318-3318
CQII Staff			
Clemens Steinbock	Director, CQII	<a href="mailto:clemens.steinbock@health.ny.gov">clemens.steinbock@health.ny.gov</a>	212-417-4730
Kevin Garrett	Senior Manager, CQII	<a href="mailto:kevin.garrett@health.ny.gov">kevin.garrett@health.ny.gov</a>	212-417-4541
Shaymey Gonzalez	Administrative Aid, CQII	<a href="mailto:Shaymey.Gonzalez@health.ny.gov">Shaymey.Gonzalez@health.ny.gov</a>	212-417-4730
Zainab Khan	Public Health Specialist	<a href="mailto:Zainab.Khan@health.ny.gov">Zainab.Khan@health.ny.gov</a>	973-650-8493

The contact information of all participants of this Learning Lab can be found on Glasscubes. Use the formation to reach out and network with your peers.

In case a participant or graduate of any Lab requires additional support beyond the scope of this training and/or exceed a reasonable amount of technical assistance by the faculty, the participant agency will be asked to submit a request for on-site technical assistance to HRSA HIV/AIDS Bureau.





## *Technologies*

The following tested virtual communication technologies are used in this Learning Lab.

**Zoom** – Routine access to this virtual communication platform is vital to participate in the Learning Lab. Participants are expected to have routine access to a webcam to connect with faculty and participants.

**Glasscubes** - A password-protected online forum (called Glasscubes and accessible at **CQII.Glasscubes.com**) has been created for registered users of the Learning Lab to gain access to all Learning Lab materials, upload completed homework assignments, listing of previously recorded sessions, etc. All Learning Lab participants are automatically enrolled into Glasscubes.

## *Using a Webcam*

It is critical that each participant in the Learning Lab uses a web camera. Seeing each other on the screen helps to maximize the opportunity to create a virtual community of learners. If a webcam is needed, CQII can provide one for the duration of the Learning Lab to ensure that all learners can actively participate via Zoom. Here are a few scenarios that can prevent a participant from using a webcam and how to overcome them:

<b>Barriers and Potential Solutions to Using a Webcam</b>	
I don't have a webcam.	I have a webcam on my computer/laptop, but I don't know how to get it to work.
CQII will provide you with a webcam, if needed, for the duration of the Learning Lab so that you can virtually join the sessions.	First, contact your IT department and ask to help you. It is an expectation to join our virtual sessions and to use a webcam. CQII will try to assist you to the best of our abilities to help you.
I use a webcam, but it is not working with Zoom.	We are not allowed to install webcams on my computer.
First, check out the Zoom website at <a href="http://www.support.zoom.us">www.support.zoom.us</a> to address the problem. Contact CQII and we will try to troubleshoot the issue with the help of our IT colleagues at Project ECHO at the University of New Mexico.	Try the following options: <ul style="list-style-type: none"> <li>- use a laptop with a camera</li> <li>- arrange to meet as a group/team in a location where a webcam is available</li> <li>- meet with colleagues who have working cameras</li> <li>- use your mobile device, including your phone</li> <li>- If no other options exist, dial-in by using the provided phone number and meeting code since we do not want you to miss the important sessions</li> </ul>



## C) Session Dates and Agenda

### *Session Dates*

Please mark your calendars! The Advanced Learning Lab meets virtually twice a month. Each meeting is 90-minutes long using the same Zoom link. The meeting dates and the corresponding due dates for the homework assignments. Note that all times are ET.

Advanced QI Learning Zoom Link		
Zoom Link: <a href="#">to be inserted</a>		
Session	Dates and Times (ET)	Homework Due Dates
Pre-Work Orientation Session		
1. QI Project Define		
2. Measure Phase I: Describe a Process		
3. Measure Phase II		
4. Analyze		
5. Improve		
6. Sustain and Control		
Post-Work Presentations (after 6-month)		

### *Session Agenda and Homework Assignments*

The following table outlines all Learning Lab sessions, agenda items, and homework assignments.

Session	Topics/Agenda	Homework Report Back	Next Homework Assignment
<b>Pre-Work Orientation Session</b>	<ul style="list-style-type: none"> <li>Set the stage and expectations for Lab</li> <li>Introduce faculty, participants, and virtual technologies</li> <li>Complete Pre-Lab QI Competency Assessment</li> <li>QI Principles and DMAIC Framework</li> <li>Define Improvement Opportunity</li> <li>QI Tools: DMAIC Project Charter</li> <li>Context, Rationale and Problem Statement</li> <li>Q&amp;A about the Lab</li> <li>Next steps</li> </ul>	[NA]	<ul style="list-style-type: none"> <li>Complete Pre-Lab QI Competency Assessment</li> <li>Agree on improvement area of the upcoming QI project</li> <li>Set up the QI team and membership</li> <li>Bringing consumers and other stakeholders to the table</li> <li>Start DMAIC Project Charter by completing a preliminary assessment of</li> </ul>

			organizational context/issues <ul style="list-style-type: none"> <li>• Become familiar with Zoom and sign up for Glasscubes</li> </ul>
<b>1. QI Project Define</b>	<ul style="list-style-type: none"> <li>• Review</li> <li>• Check-In &amp; Peer Exchange</li> <li>• Refining QI Project Focus</li> <li>• Completing a SIPOC Diagram– Stakeholders, Input, Process, Output, Customers</li> <li>• Scoping your project</li> <li>• Next Steps</li> </ul>	Report back on DMAIC Project Charter sections in the Define Phase: Organizational context/issues, QI Project rationale and problem statement, improvement area	<ul style="list-style-type: none"> <li>• Meet with your QIP team</li> <li>• Familiarize the team with the use of DMAIC Project Charter and begin filling out background information and data</li> <li>• Complete a SIPOC diagram</li> <li>• Scope your QI Project</li> <li>• Document QI Project Scope on your DMAIC Project Charter QI Project</li> </ul>
<b>2. Measure Phase I: Describe a Process</b>	<ul style="list-style-type: none"> <li>• Group Exercise</li> <li>• Check-In &amp; Peer Exchange</li> <li>• Planning Your Gemba Walk</li> <li>• Voice of the Customer</li> <li>• Techniques and Tools</li> <li>• Opportunities for Improvement</li> <li>• Action</li> </ul>	Report back of Updated A3 – DMAIC Project Charter Progress on SIPOC Diagram Project Scope – In bounds, Out of bounds	<ul style="list-style-type: none"> <li>• Meet with your QI Project Team</li> <li>• Plan a Gemba Walk and implement after Session 3</li> <li>• Discuss and select at least one new technique and tool to gather data on customers’ perspective</li> <li>• Add Customer’s perspective to your DMAIC Project Charter</li> </ul>
<b>3. Measure Phase II</b>	<ul style="list-style-type: none"> <li>• Group Exercise</li> <li>• Check-in, Peer Exchange and Reflection</li> <li>• Overview – Measure II Phase</li> <li>• Data Collection Plan</li> <li>• Measuring Systems and Types of Measures</li> <li>• Measuring a Process</li> <li>• Tools: Value Stream Mapping</li> <li>• Advanced Metrics</li> <li>• Measuring Improvement Cycles</li> <li>• Next Steps</li> </ul>	Report back of Updated A3 Define Phase Gemba Walk Customers/Stakeholders Customer Requirements	<ul style="list-style-type: none"> <li>• Meet with your QI Project Team</li> <li>• Complete measures in your SIPOC Diagram</li> <li>• Create a data collection Plan</li> <li>• Analyze results of your Gemba Walk with QIP Team</li> <li>• Create a VSM with measures</li> <li>• Update your progress on your DMAIC Project Charter Project Charter</li> </ul>
<b>5. Improve</b>	<ul style="list-style-type: none"> <li>• Group Exercise</li> <li>• Check-in, Peer Exchange and Reflection</li> <li>• Improve and Implement Phase</li> <li>• Key Steps and DMAIC Project Charter Questions</li> <li>• Tools (priority matrix, risk assessment, challenges)</li> <li>• Future State VSM</li> <li>• Solutions and small tests of change</li> <li>• Implementation work plan</li> <li>• Try a simple Kanban Board</li> <li>• Taking Action</li> </ul>	Report back of Updated A3 – Analysis Root Cause Analysis	<ul style="list-style-type: none"> <li>• Meet with your QI Project Team</li> <li>• Discuss and respond to Improve Phase DMAIC Project Charter questions</li> <li>• Application of Tools</li> <li>• Results of your prioritization, FMEA analysis (risk assessment) and challenges</li> </ul>



<b>6. Sustain and Control</b>	<ul style="list-style-type: none"> <li>• Group Exercise</li> <li>• Check-in, Peer Exchange and Reflection</li> <li>• Control and Sustain Phase</li> <li>• Key Steps and DMAIC Project Charter Questions</li> <li>• Tools (Statistical Control - Control Charts; Process Control - Visual Controls)</li> <li>• Sustain and Standardize Work (Standard Operating Procedure (SOP))</li> <li>• Training Plan</li> <li>• Taking Action</li> </ul>	Report back of Updated A3 - Improve Solutions -Future State Process -Implementation Plan	<ul style="list-style-type: none"> <li>• Meet with your QI Project Team               <ul style="list-style-type: none"> <li>- Continue each QIP Phase</li> <li>- Discuss and respond to Control and Sustain Phase DMAIC Project Charter questions</li> <li>- Application of Tools and update your DMAIC Project Charter</li> </ul> </li> <li>• Create a control and sustain plan               <ul style="list-style-type: none"> <li>- Control Charts, Visual Controls</li> <li>- Gap analysis between actual and desired performance, Team Kanban Huddles</li> <li>- Standardize work (SOP), Training Plan</li> </ul> </li> <li>• - Update your progress on your DMAIC Project Charter Project Charter</li> </ul>
<b>Post-Work Storyboard Presentations (after 6-month)</b>	<ul style="list-style-type: none"> <li>• Celebrate Success</li> <li>• Dissemination of Results</li> <li>• Completion of Post-Lab QI Assessment</li> </ul>	N/A	<ul style="list-style-type: none"> <li>• Dissemination of QI project results</li> <li>• Next QI project steps</li> </ul>



## D) Frequently Asked Questions

Frequently Asked Questions	
Question	Answer
<b>Where can I learn more about the other Learning Labs?</b>	Please visit our website to learn more about the other Learning Labs, their expectations and whether you should apply for them. The Learning Lab Concept paper also outlines a detailed description for each Lab – see the CQII website.
<b>What should I do when I have to miss a class?</b>	All participants are expected to join every session. In case you need to miss one, please reach out to your faculty before and download the session materials. The recording will be made available on Glasscubes. Do not forget to submit your homework on time.
<b>Whom should I contact when I have a question about my homework assignment?</b>	Reach out to your faculty to ask your questions – see the contact list in this Curriculum for the contact information.