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# Module 10 – Day 2

8:00 – 8:30 am (30 min)

## Welcome to Day 2

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## Agenda – Day 2

- 8:00 Welcome & Warm-up Activity
- 8:30 Group Learning Activity – “Win All You Can”
- 9:30 Building Effective QI Teams
- 10:45 Meeting Effectiveness and Facilitation Skills
- 12:30 Lunch
- 1:30 Quality Management Program Assessment
- 4:00 Action Plan
- 4:30 Mini Presentations: Facilitation Nightmares
- 5:00 Aha! Moments, Evaluation

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## Icebreaker '2 Truths & A Lie'

1. Individually spend 1 minute writing on a piece of paper 3 facts about you: 2 must be the truth, one can be a lie
2. Ask for volunteers: share your three 3 facts about you and all participants should guess which one is not true

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# Parking Lot Review & Discussion

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# National Quality Center (NQC)

212-417-4730

NationalQualityCenter.org

Info@NationalQualityCenter.org

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# Group Decision Making Activity

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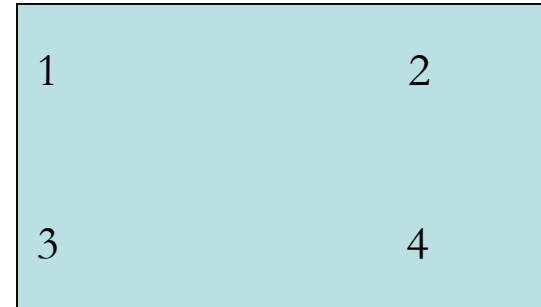
# Learning Objectives

Participants will be able to explain 3 key learning's from this activity about group decision making

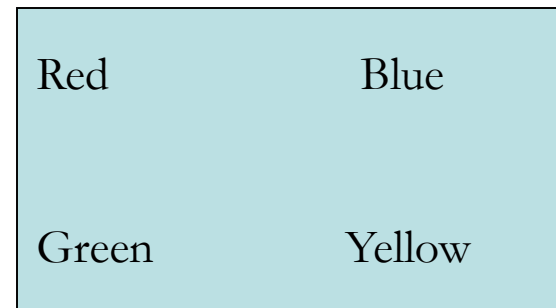
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# Group Decision Making Activity

- Four Teams
  - Count off 1- 4
  - Move to your corner



- Hand Out Supplies
  - Change Team Name
    - Red Team
    - Blue Team
    - Green Team
    - Yellow Team





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Win All You Can

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# Over All Instructions

## Exercise Instructions

- There will be six (6) rounds of the exercise.
- In each round you will be asked to choose either an “x” or a “y” and write it on a slip of paper the color of your team.
- Rounds 3, 5, and 6, respectively are bonus rounds where winnings and losses will be multiplied 3, 5, and 10 times respectively.
- Before each bonus round teams may discuss strategy by spending 3 minutes with a representative from each of the four teams in negotiation; and then have one minute more to discuss the vote within the team before turning in the ballot.

---

# Over All Instructions

## Exercise Rules

- You may not confer with other teams unless you are told you may do so
- You may not share your vote with any other team before you turn your vote into the scorekeeper
- If you have been through this exercise before( poll) the you are an observer. Observers will take notes on group decision making skills of the participants.

---

# The Pay Off's

4 X'S = Each Team *Loses* 1\$

3 X's = *Win* 1\$ Each

1 Y = *Lose* 3\$

2 X's = *Win* 2\$ each

2 Y's = *Lose* 2\$

1 X's = *Win* 3\$

3 Y's = *Lose* 1\$ each

4 Y'S = Each Team *Wins* 1\$



VIRTUAL PRETEND MONEY

	VOTE				SCORE			
Round	Red	Yellow	Blue	Green	Red	Yellow	Blue	Green
1								
2								
(sum)								
confer								
3								
(sum x 3)								
4								
(sum)								
confer								
5								
(sum x 5)								
confer								
6								
13 (sumx10)					Center for Quality Improvement and Innovation			

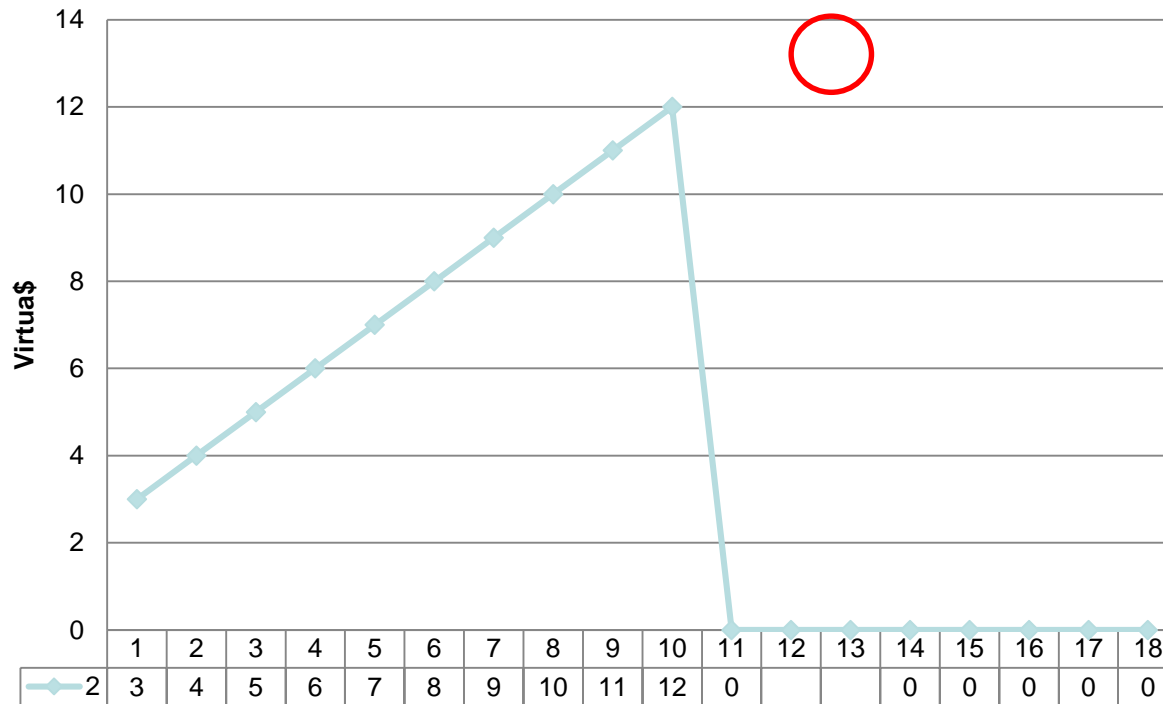
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# Debrief



- How did you define win all you can?
- What was won? What was lost?
- What would be required for the 4 teams to function as one system and optimize the whole?
- Did the strategy ever shift from your team winning to making the other team(s) lose?
- How does this apply to “real life organizations”?

## WAYC Data: Total Virtual \$ for all 4 Teams



power  
of  
structure



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# Change Hats!



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**Module 12 – Day 2**  
**9:30 am – 10:15 am (45 min)**

**Building Effective Quality Improvement  
Teams**

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Why are teams important to  
QI efforts?

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# Teams Outperform Individuals When..

- The task is complex
- Creativity is needed
- The path forward is unclear
- More efficient use of resources is required
- Fast learning is necessary
- High commitment is desirable
- The implementation of a plan requires the commitment of others
- The task or process is cross-functional

Peter Scholtes et. al, The Team Handbook.

---

## Bottom Line

*“Teams outperform individuals  
in settings like those that  
provide HIV care”*

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How many of you have  
struggled with team related  
issues in your QI work?

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## Learning Objectives: You will learn about...

- Introduction to how teams can improve HIV care
- Promising practices for high performing teams
- Ways to clarify roles and responsibilities of those who are participating in teams
- Issues which disrupt team effectiveness
- Tips for how teams can best work together

---

# Story.....

Think about all the teams you have lead, participated in or just observed. Which ones were most successful?





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# Story.....

....Now .. Of those that were successful ....there is one that stands out from the others. It comes clearly to mind because it was so remarkably successful



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## Share (briefly) your stories ..

What happened, when and where did it happen, why did it happen and who was involved?

## Reflect a bit on the stories...

Do you think the experience of others on your team was similar?

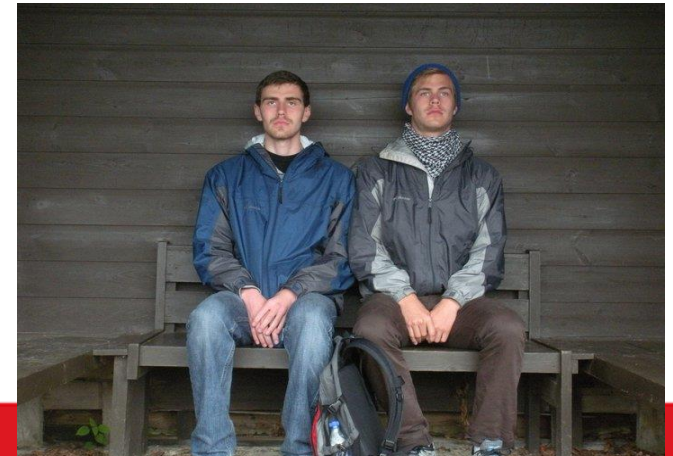
What was it about the event that made you feel so good...

## Identify your learning's...

What did the choice of your stories reveal about your value system?

What is one characteristic that is important to the success of a team.

# NOW... IN PAIRS



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char·ac·ter·is·tic

defining distinguishing feature

---

# Characteristics of Higher Performing Teams

- Reward individual performance that supports the team.
- Communicate effectively
- Practice effective dialogue instead of debate
- Identify and resolve group conflicts
- Vary levels and intensity of work
- Provide a balance between work and home.
- Critique the way they work as a team, regularly and consistently
- Practice continuous improvement

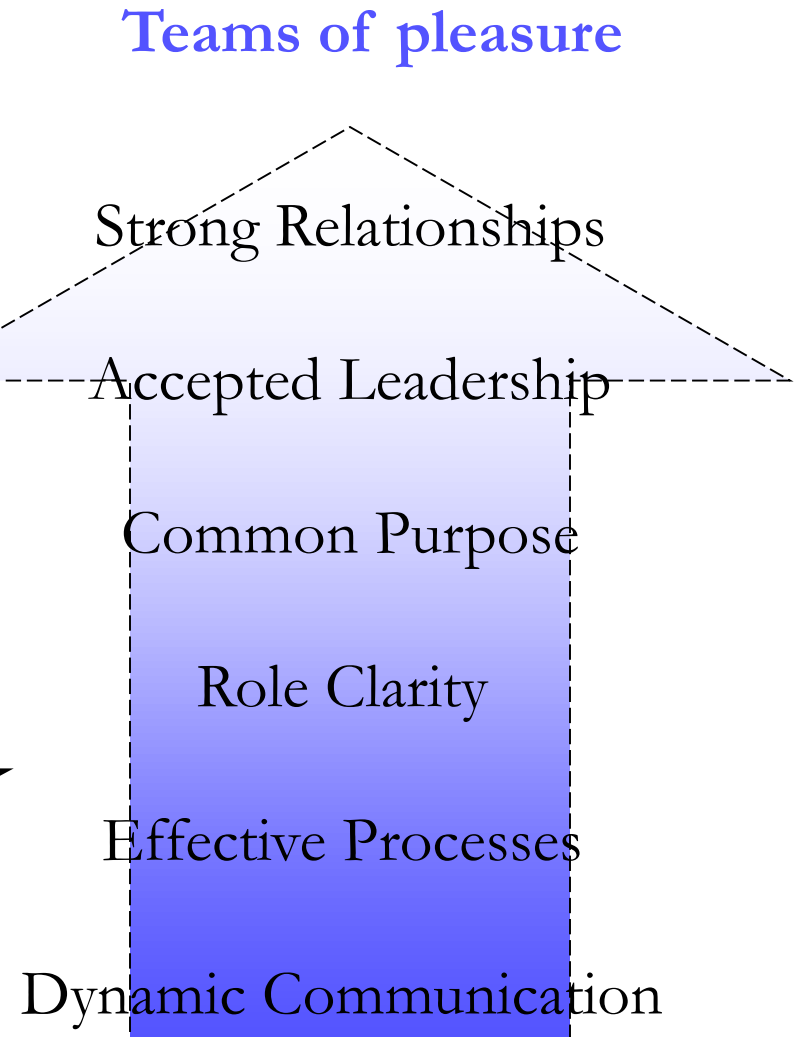
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# Characteristics of Higher Performing Teams

- Share a common purpose / goals
- Build relationships for trust and respect
- Balance task and process
- Plan thoroughly before acting
- Involve members in clear problem-solving and decision making procedures
- Respect and understand each others' "diversity"
- Value synergism and interdependence
- Emphasize and support team goals

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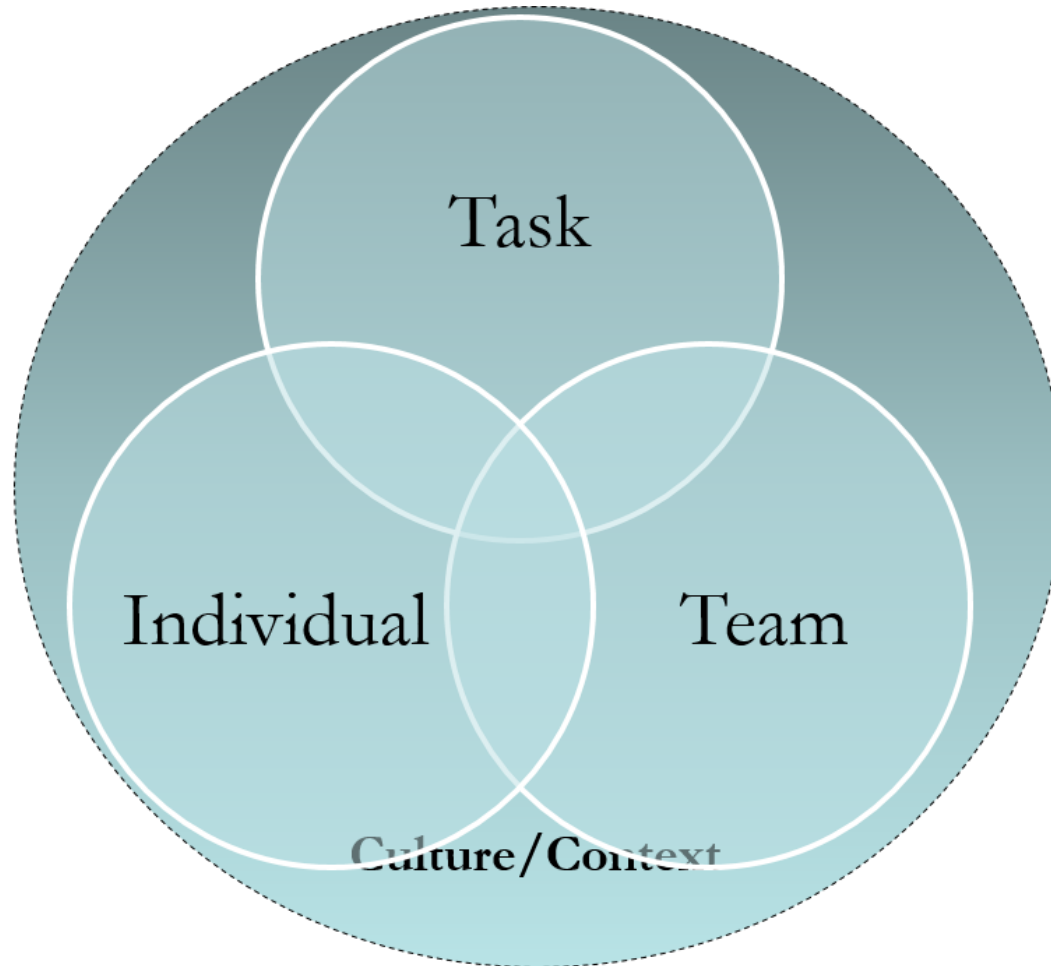
# Building Quality Teams in Your Organization

Set the stage for effective teams...

- Develop consensus in the organization what team effectiveness should look like
- Develop and communicate expectations for teams
- Conduct team assessments and provide teams feedback on strengths/weaknesses
- Hold teams accountable for poor performance
- Reward teams for successful team performance
- Work on communications practices and skill building
- Improve facilitation acumen

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# Team Diagnosis





# Points To Ponder - Task

- Is the team clear about its mission?  
Have we designed a workplan to accomplish our mission?
- Are we appropriately dividing up work assignments?
- Is the work getting done?
- Do we have adequate resources?
- Are we following our time line?



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## Points To Ponder - Team

- How cohesive is this team?
- Does everyone have an opportunity to participate?
- Are all ideas being heard?
- Is the team climate open and trusting?
- How are decisions being made?
- How does the team deal with conflict?



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## Points To Ponder - Individual

- Is each individual effectively participating on the team?
- To what extent does each team member buy into the results the team wants to achieve?
- Do team members practice effective team communication and participation skills?
- Do team members have the necessary technical skills to effectively participate/contribute?



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# Task, Team, Individual Assessment

1. Review the assessment statements, 'M12 Team Assessment'
2. Think of a recent team experience which lasted several months in which you played a part
3. Complete the assessment as indicated
4. Discuss your assessment results with others at your table

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# Topics

1. Support from the top
2. Working across disciplines
3. Team roles and responsibilities
4. Team development (Stages)

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# Topic 1: Support from the Top

*“It was so frustrating, we had all these meetings but we couldn’t ever agree on what to do. Some people were so defensive, and even when we did come up with an idea, we needed to change some people’s schedules to make it happen and no one would support us in this.”*

- A quality improvement project facilitator

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## Brainstorm

What can leaders do to help  
create more effective QI  
teams in organizations?

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Charlton Ogburn  
*"Merrill's Marauders"*  
Harpers Magazine  
January 1957





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## Topic 2: Working across Disciplines

Who knows what really goes on, day-to-day, in your clinic?

- a) The doctors, of course, because they see the patients
- b) The clinic manager, I mean, she's in charge, right?
- c) The social workers are the only ones who ever really talk to the clients
- d) The nurses see all the patients
- e) The front desk workers, they see everything
- f) All of the above

---

# What are the challenges to working across disciplines?

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## Topic 3: Team Roles and Responsibilities

### Roles:

- Leader
- Facilitator
- Member
- Timekeeper
- Recorder



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# Responsibilities

- **Leader:** first among equals; guides the team and represents its work
- **Facilitator:** coach, helps keep things working well
- **Member:** equal participant, provides information and helps make good decisions
- **Timekeeper & Recorder:** rotating roles to help with meetings and record-keeping

---

# Team Functions – Different Look at Teams...

- Dreamers
- Designers
- Doers
- Doubters
- Data Gatherers
- Documentors
- Demonstrators



Charlene Doria-Ortiz, Texas

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# Additionally Make Use of GRPI

An engagement tool designed to help the group discuss 4 critical and interrelated aspects of teamwork on a frequent basis

Review the Team Goals, Roles, Processes and Interpersonal Relationships (GRPI) Handout

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# Topic 4: Team Development



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# Stages of Team Development

- Forsyth (1990) indicates that there are over 100 group formation models.
- Most however highlight Tuckman's stages

Forming	Storming	Norming	Performing
---------	----------	---------	------------

Forming	Storming	Norming	Performing	Adjourning
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## Topic 4: Team Development

- **Forming:** getting to know each other; teams will be cautious, and polite
- **Storming:** it's starting to get real; team members will protect their point of view
- **Norming:** beginning to trust each other; teams will begin to cohere and really work together
- **Performing:** progress! ..and team satisfaction

---

# Issues which Disrupt Team Development

- New members to the team
- People who lack authority to contribute to team decisions
- People who miss meetings
- People who arrive late
- People who leave early
- Others?

Question: What can you do about these issues?

---

# Closing

- What we need to do is learn to work in the system, by which I mean that everybody, every team, every platform, every division, every component is there not for individual competitive profit or recognition, but for contribution to the system as a whole on a win-win basis.

**W. Edwards Deming**  
**(1900 - 1993)**

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## References

- Scholtes, Peter R., et.al., *The Team Handbook*. For more information see: <http://www.orielinc.com>
- Tools for Recipients from the Health Resource and Service Administration's HIV/AIDS Bureau:  
<http://hab.hrsa.gov/tools.htm>
- Howick Associates, Communicating for Results course for teams. For more information see:  
[www.howickassociates.com](http://www.howickassociates.com)
- Howick Associates, Assessment Services, see  
[www.howickassociates.com](http://www.howickassociates.com)
- Howick Associates, The New COMPLEAT Facilitator, available through [www.howickassociates.com](http://www.howickassociates.com) for an NQC price of \$20.00

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**Break** 😊

**Today's Mini presentation Volunteers please come forward 😊**

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# National Quality Center (NQC)

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Module 05 – Day 1

Facilitation 8

1:00 – 2:00

Improvement Alert!

Now Doing M 5 and M 6 on Day 2 in Reverse Order  
Together Shortened and Improved 😊

Day 1

Effectiveness

2:00 – 3:00 pm (60 min)

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**Module 06 – 05 Day 2**  
**10:45 – 12:30 (105 mins)**

**Meeting Effectiveness  
and  
Facilitation**



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# Learning Objectives: You will learn about...

## Meeting Effectiveness

- Understand the importance of planning and designing effective meetings
- Share tools to improve meeting effectiveness
- Understand the importance of a well designed agenda and experience the process of designing a meeting agenda
- Consider how environmental issues affect meeting planning

## Facilitation

- Understand the importance of facilitation when planning and designing group activities
- Explore the necessary skills needed for effective facilitators and apply them during the session
- Understand the roles and responsibilities of facilitators

# Are you lonely?

Tired of working on your own?

Do you hate making decisions?

## HOLD A MEETING!

*You can —*

- See people
- Show charts
- Feel important
- Point with a stick
- Eat donuts
- Impress your colleagues

All on company time!



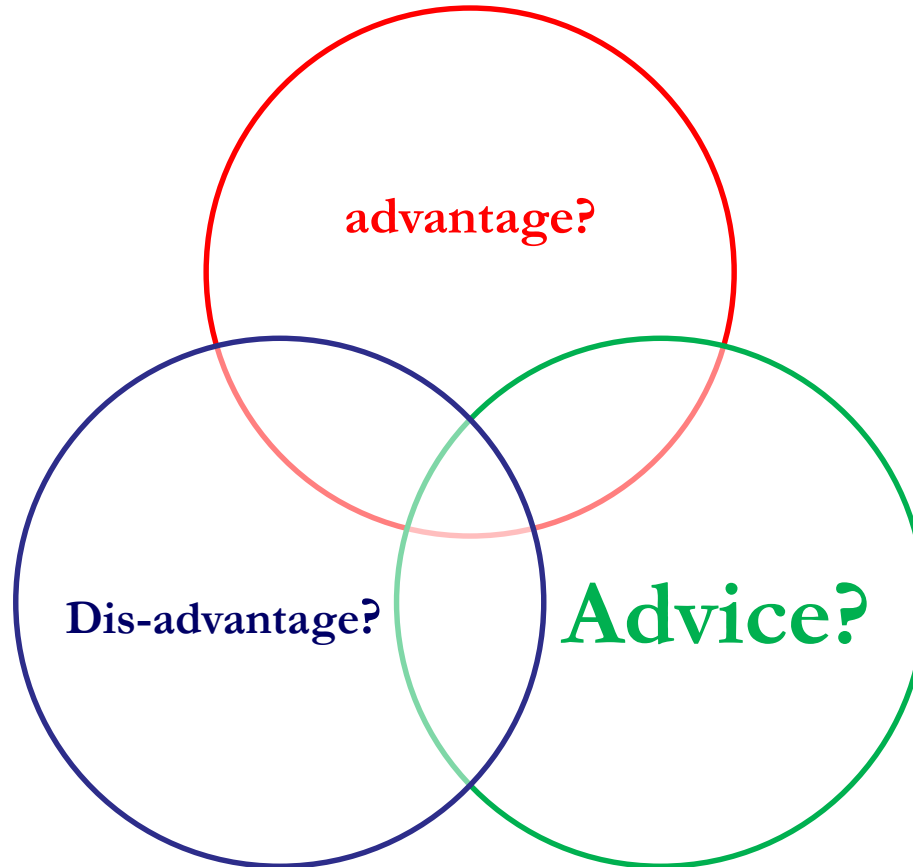
## MEETINGS

THE PRACTICAL ALTERNATIVE TO WORK



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# Virtual Meetings



# On Leading Well

Ken Cochrum explores spiritual and strategic leadership

CLOSE

LEADING WELL  
ACROSS DISTANCE  
AND CULTURES

[Home](#) / [Leadership](#) / [How to Improve Any Virtual Team Meeting](#)

## How to Improve Any Virtual Team Meeting

July 28, 2011 — [2 Comments](#)

*This fourth post in our series on Distance Leadership comes from my good friend Erik Butz, VP of Global Operations for Cru.*

### How to Improve Any Virtual Team Meeting

We all know that running an effective meeting is tough, even with a group from the same culture that is sitting in the same room. But even more things can trip you up when you're trying to lead a virtual meeting with people across multiple locations, time zones, languages and cultures.



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# How to Improve Any Virtual Team Meeting

( <http://www.onleadingwell.com/2011/07/28/improve-virtual-team-meeting/> )

- 1. Establish a strong foundation of relationship and trust** by having initial (and occasional ongoing) face-to-face meetings with your virtual team.
- 2. Develop and follow virtual meeting norms. Involve all participants in virtual meetings.** If all participants have a specific role in the meeting, I find they will be more engaged overall.
- 3. Keep priorities and action points visible to all and promote group accountability.** Leveraging shared document technology like Google docs can really help your team communicate and focus
- 4. Leverage collaboration tools to save discussion time.** We often think of virtual meetings as being less efficient as being face-to-face. However, in some cases, a team can gather information and “think together” more quickly using online tools.
- 5. Test your meeting technology and tools.** My teams and others I’ve observed have wasted WAY too much time on IT issues at the start of meetings
- 6. Train your team on meeting technology and collaboration methods.**
- 7. Adjust for language and cultural issues.**



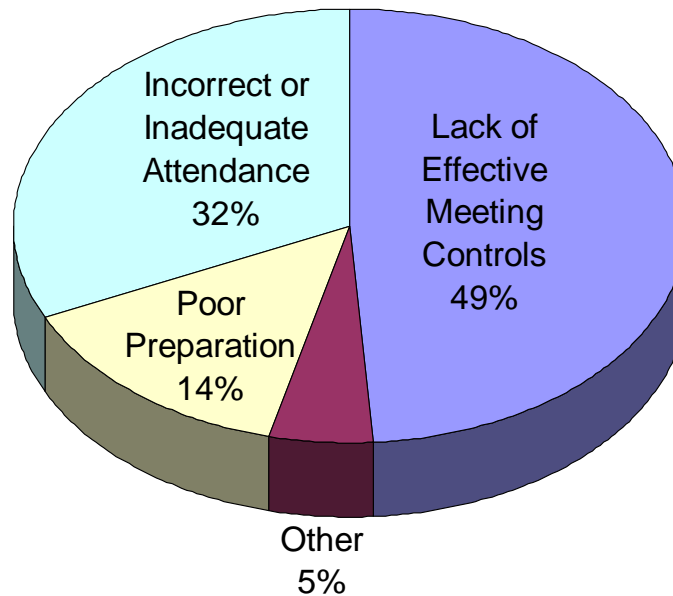


It was the best time.... it was the worst time....

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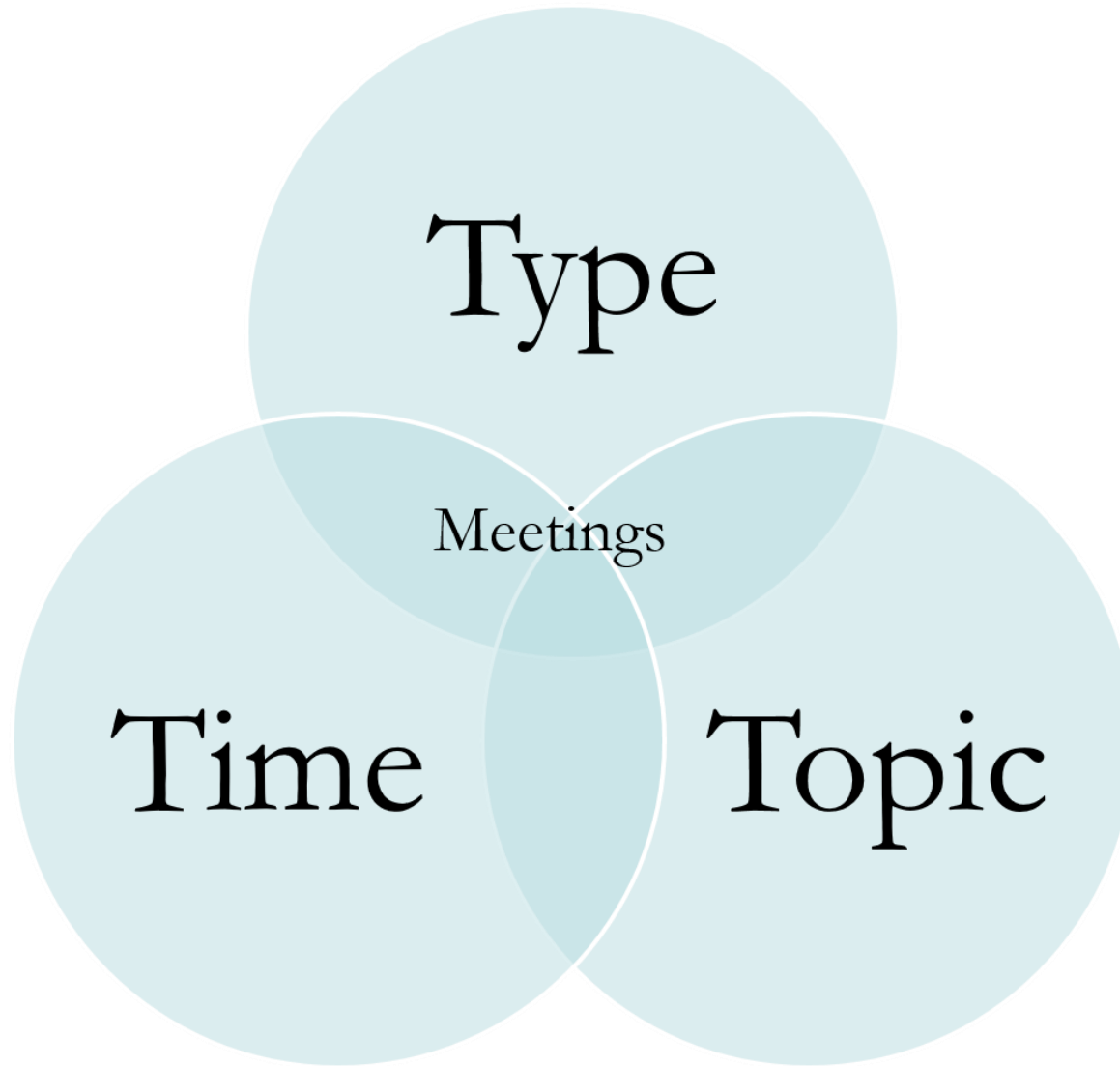
# The Gap

## Causes of Meeting Ineffectiveness



Source: Resource Alliance. Survey of Project Managers. June 2006





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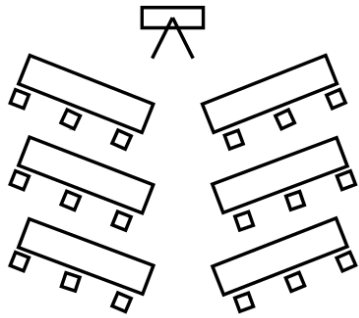
# Planning Considerations – The Environment

The environment matters – be aware: You will never win!

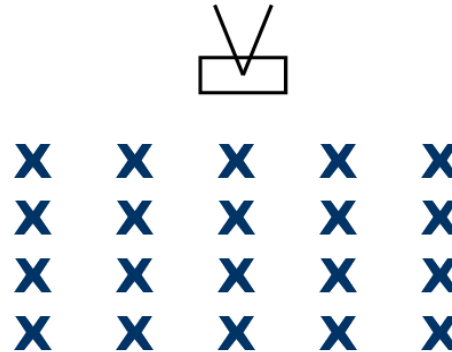
- Room size, room layout, adequate chairs & tables
- Meeting location options, ease of travel
- Other access issues, i.e., building security
- Availability of training equipment, flipchart/whiteboard
- Availability of space to post items on the walls
- Free from interruptions
- Functioning equipment, speaker phone, computer, projector
- Other?

# Physical Environment – You never win!

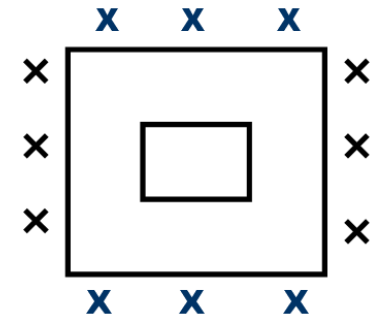
Chevron



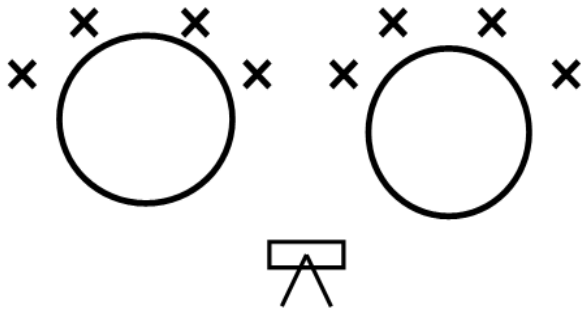
Theater Style



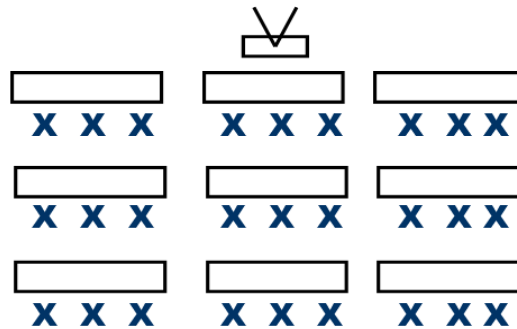
Hollow/Solid Square



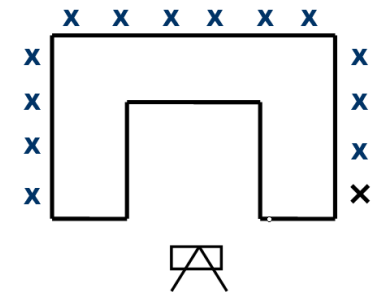
Half-Circle



Classroom Style



U-Shaped



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# Preparation - Prior to the first meeting, you should...

- Define the expectations
- Ensure that the right people are involved
- Understand the context
- Key questions:
  - What are the objectives and team member roles?
  - What are the group timetable expectations?
  - What physical or financial resources are available?
  - What skills do members bring?
  - What is the meeting frequency?
  - What challenges or constraints can be expected?
  - What is the past history of this group?

---

# Preparation

- Establish group framework
- Develop detailed meeting agenda
- Suggest ground rules
- Plan, plan, plan

Time	Issue	Lead	Format	Materials	Objective
Start and end of activity	What to expect	Who will lead	Discuss Decide Table group	Flipchart Markers	

---

## Tools..... **COOL TOOLS!**

- Icebreakers
- Ground Rules
- Parking Lot
- ...
- Agenda
- Team Meeting Record
- Action Planning Form
- Meeting De-briefing

# Agenda

What?

Who?

When?

How?



---

# Sample Agenda

**Facilitator: John Expert**

WHO	WHAT	OBJECTIVE	TIME
Everyone	Check In	Warm up	8:15 - 8:45
Everyone	Review Ground Rules	Ensure buy-in and reduce conflict	8:45 – 8:50
Abby	Effective Meeting Management	Opening instruction	8:50 – 9:00
Small Groups	Activity: Leader Intervention pg. 18-19	Practice. Engagement beyond awareness	9:00 – 9:30
Everyone	Break		9:30 – 9:45



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## An Approach: The 6-Step Meeting Agenda

1. Clarify the purpose of the meeting
2. Designate or assign the roles of the meeting
3. Work through agenda
4. Plan next steps
5. Plan next meeting agenda
6. Evaluate the meeting

Adapted from the 7 Step Meeting process – Executive Learning, Inc.

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# Group Exercise

Small Group Exercise – 20 min:

- Identify group facilitator
- Review the scenarios and decide on one for developing an agenda (pg. 114 in Guide) or could use your own if someone has a meeting coming up they would like to use.
- Complete the Agenda handout (page 10 - 12 HOH)
- Report back to the larger group
- Provide constructive feedback to facilitator (2 min)

---

# Facilitation.....

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# What is the difference .....

## Facilitation



## Facilitator



---

# When

## Facilitation

- Aim of group facilitation: to establish and maintain an environment within which learning is created and common goals are achieved
- ‘When a group is masterfully facilitated people say, “We did it ourselves!”’

## Facilitator

- When to add a facilitator: ‘*low certainty + low agreement = facilitated meeting!*’
- Other ideas....

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# Roles



<b>Facilitator</b>	<b>Leader</b>
Facilitates	Directs
Process focused	Result focused
Asks questions	Provides solutions
Guides to solutions	Solves problems
Remains neutral	Voice opinions
Challenges the team to meet groups goals	Sets the goals and requires the team to meet them
Helps the team “graduate” and become self-sufficient	Has long-term relationship with team

---

# Tips from the Trade – Facilitator and Leader...

- Discuss with the group the differences: be authentic
- Tell people when you are in one role or another
- Be clear which role you are in when decisions or choices are being made
- Make conscious choices about which role you need to play and when to play it
- Other ideas?

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# Brainstorming

*What are behaviors of successful facilitators that you have experienced?*





Coach



Teacher

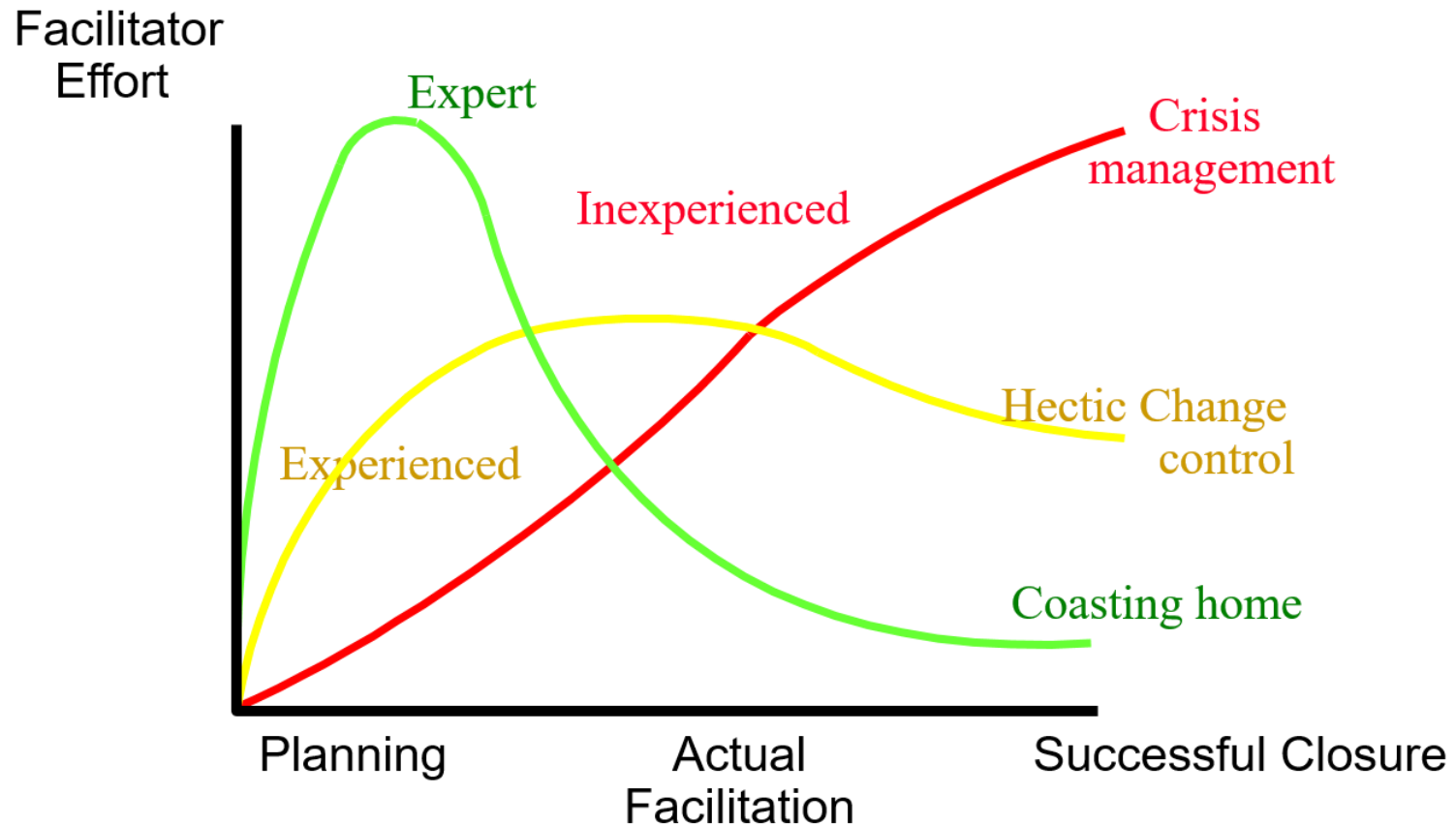


Conductor



Catalyst

# Facilitator Planning Skills



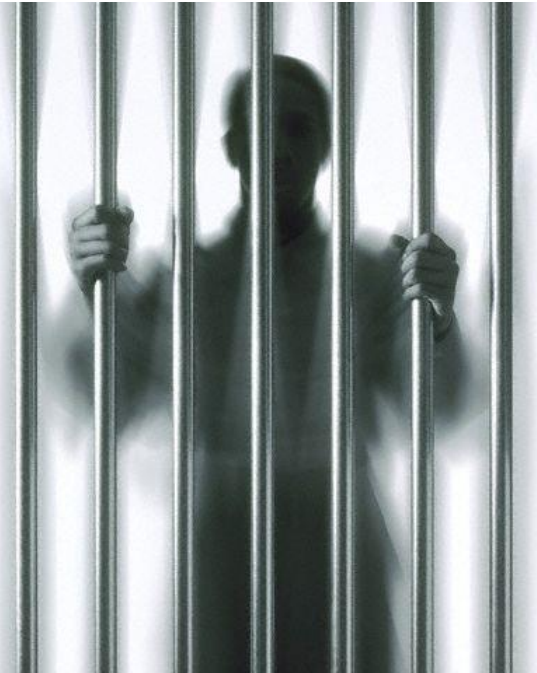
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# Tips from the Trade - Before you get started?

- ‘Get at least half of the work done in advance’
- Try to avoid designing to suit yourself based on your own assumptions and preferred working/learning style
- Within 10min, get all participants to talk
- Choose a decision-making method before you need it
- Know the group expectations
- Be aware of environmental factors, individuals and group dynamics (e.g., projection, transference, groupthink)
- Reach out to ‘special’ participants
- Be aware of your own biases

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# Types of Participants

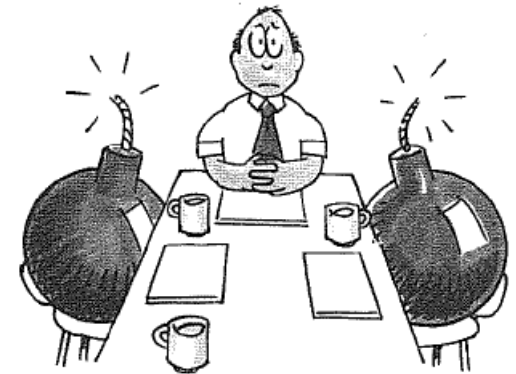


# Personality Types of Participants



Ramblers

## Complainers and Negativists

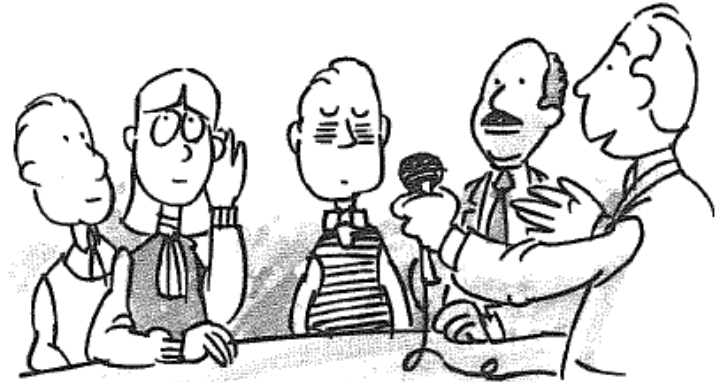


Flounders



# Personality Types of Participants

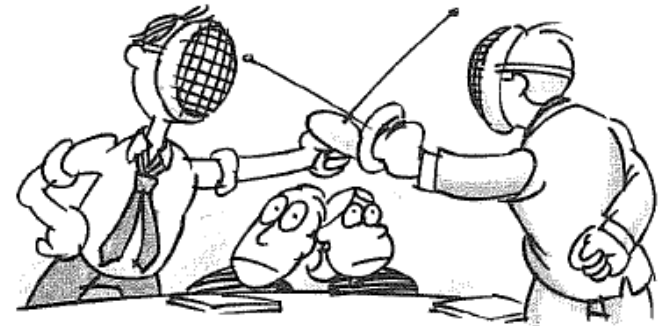
Indecisives/Silent-unresponsives



Super-agreeable



Hostile-aggressives



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# Group Exercise – Personality Types

Small Group Exercise – 7 minutes:

- Identify group facilitator
- Brainstorm how to engage the assigned personality types and make them productive group members
- Provide constructive feedback to facilitator (2 min)

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# Tips from the Trade – Advice from Facilitators!

- Be positive, supportive and approachable; often compliment the group
- Always be respectful and don't take sides; be calm in time of emotion...
- Cope with uncertainty and allow disagreement; remove distractions and be aware of groupthink
- Actively listen – summarize/paraphrase; 'do not make assumptions, challenge them'
- Use language familiar with the group
- Observe non verbal communications; think about pace
- Be clear about your role
- Don't talk to much; 'facilitate NOT participate'



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**MORE INFORMATION....**

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# The Role of “Traffic Cop”

**Specific words and phrases useful in directing traffic:**

- **Observing** “There seems to be concern about...”
- **Clarifying** “What I hear you saying is...”
- **Focusing** “Getting back to the agenda...”
- **Stimulating** “What ideas can we come up with...?”
- **Balancing** “Does anyone else have another viewpoint?”
- **Summarizing** “To review the key points we’ve heard today...”

See Mod 5 Handout for more details
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# Tips from the Trade - What to do about silence?

- Don't assume consent or disagreement by silence; quickly poll group before major decisions
- In your head, count till 10 to allow for audience to respond
- For key questions, write them down for everyone to read
- If no response, simply say, "Turn to the person next to you and discuss!"
- Stray from agenda when necessary

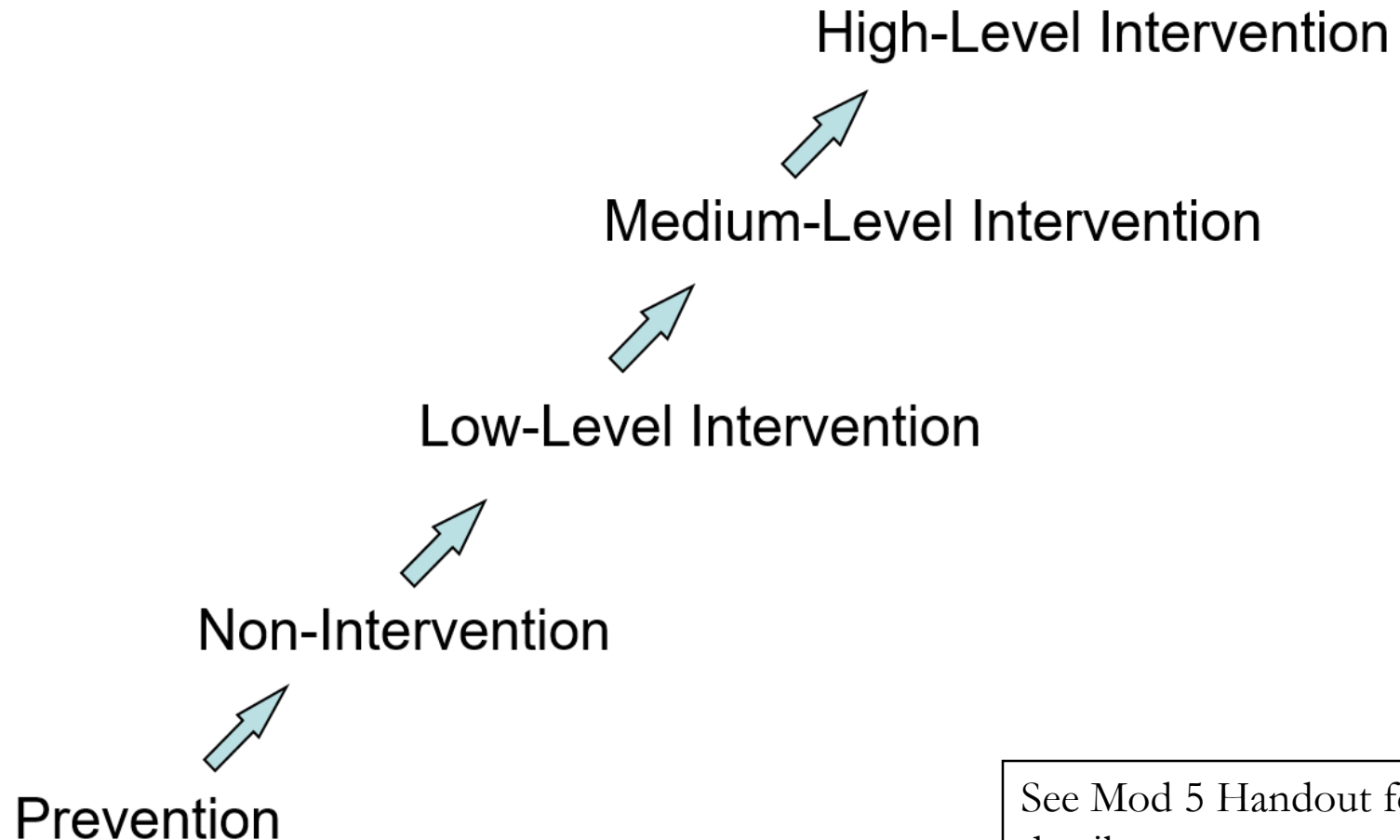
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# Dealing With Difficult Behaviors



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# Intervention Strategies

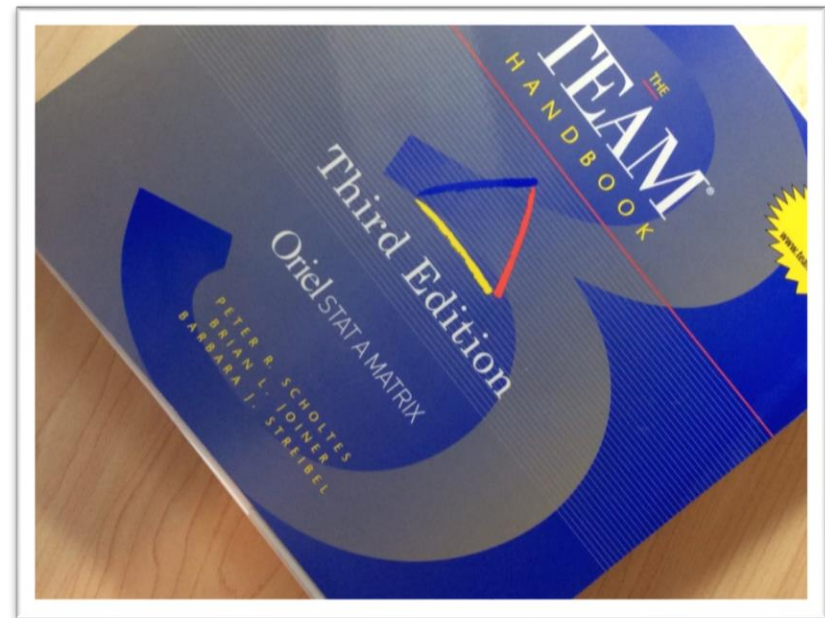
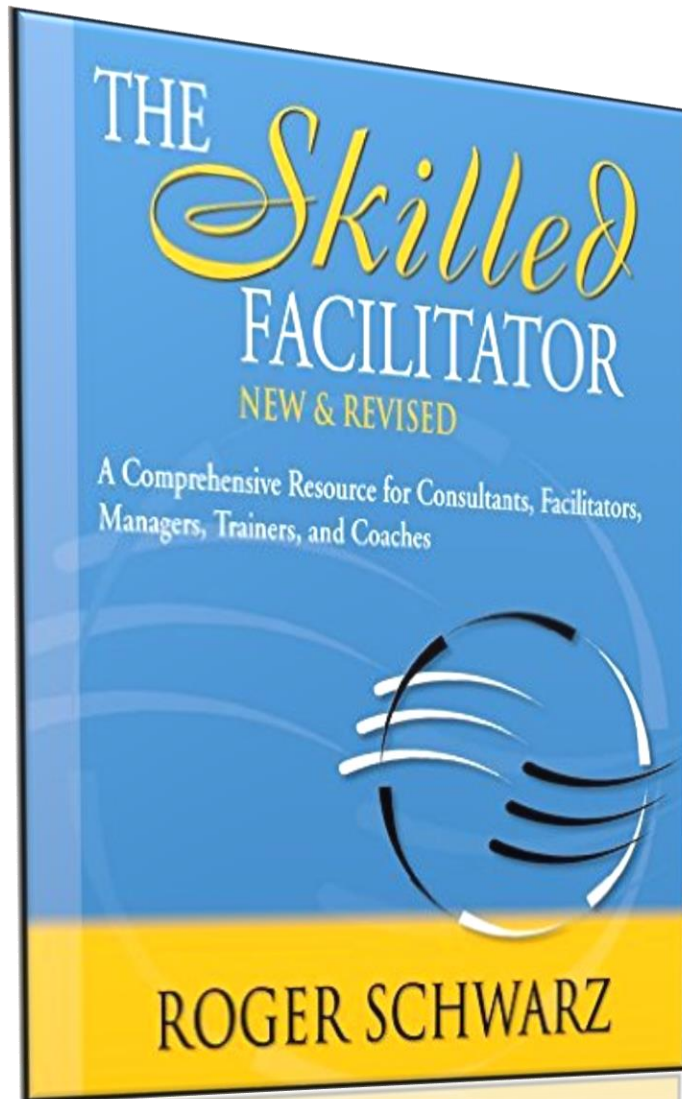


See Mod 5 Handout for more details

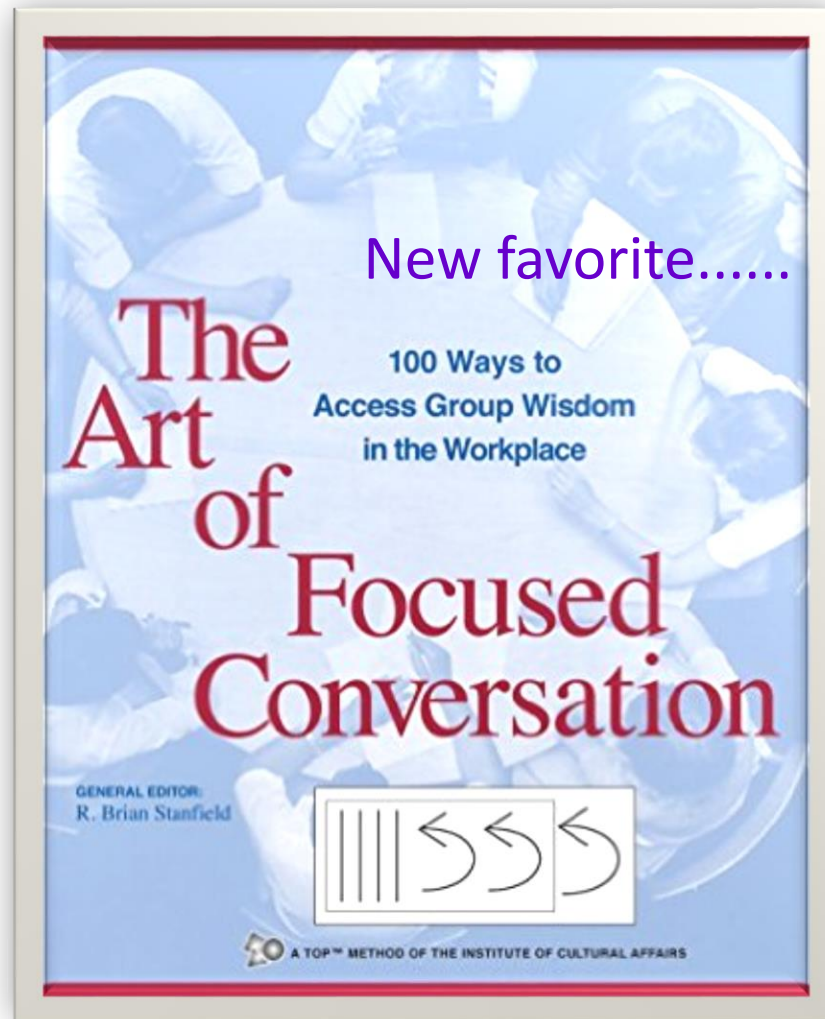
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# Tips from the Trade – Dealing with conflicts?

- Prevention over intervention
- Maintain your neutral position
- Help the group be mindful of its ground rules
- Intervene immediately if members launch into personal attacks
- Let group members know they have been heard by paraphrasing and summarizing the points of view being expressed
- Check in often with group members to make sure they feel they have been heard correctly and feel understood
- Work with the group to expand participants' understanding of one another's viewpoints
- Help the group decide whether and how to deal with the issue



New favorite.....





---

# References

- [Ingrid Bens](#) (Author); Facilitating with Ease!; Jossey-Bass ; [ISBN 0-7879-7729-2](#) (New & Revised Feb 2005)
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# Let's Do Lunch!



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**Module 14 – Day 2**  
**1:30 – 4:00 pm (150 min)**

**Quality Management Assessment**

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# Objectives

- Reinforce the importance of assessment, gap analysis and action planning as part of the quality management environment
- Increase the confidence of participants in conducting a quality management program assessments and summarizing key assessment findings
- Receive assessment feedback from another participant on their quality management program

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# Basic Tasks & Timeframes

- Introduction and identification of pairs – 10 min
- Conducting an assessment of your partners' program – 70 min
- Break – 20 min
- Key Findings – 20 min
- Discussion on how to conduct organizational assessments – 20 min
- Q&A – 10 min

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# Quality Program Assessment Tool

- Part-specific Organizational Assessment Tools to assess the HIV-specific quality program
- Benefits of using these tools include:
  - increased inter-rater reliability due to standardized scoring tools
  - allowing for comparisons over time
  - comparisons with other HIV programs

# Quality Program Assessment Tool

- Available for each Part
- Series of key questions to assess quality plan, quality infrastructure, performance measurement, staff/consumer involvement and quality activities
- Scoring instrument from 0 (rudimentary) to 5 (advanced)
- Written scoring instructions

## NQC Part B Quality Management Program Assessment Tool

State: \_\_\_\_\_  
 Contact Person: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Quality Management Plan					
A.1. Is a comprehensive HIV-specific, statewide quality management plan in place with clear definitions of leadership, Part B roles, resources and accountability?					
Score 0	Score 1	Score 2	Score 3	Score 4	Score 5
Score 0	Part B program has no or minimal written quality plan in place; if any in existence, written plan does not reflect current day-to-day operations.				
Score 1	Part B program has only loosely outlined a quality management plan; written plan reflects only in part current day-to-day operations.				
Score 2					
Score 3	A written statewide quality management plan is developed describing the quality infrastructure, frequency of meetings, indication of leadership and objectives; the quality plan is shared with staff; the quality plan is reviewed and revised at least annually; some areas of detail and integration are not present.				
Score 4					
Score 5	A comprehensive and detailed HIV-specific, statewide quality management plan is developed/refined, with a clear indication of responsibilities and accountability across DOH, quality committee infrastructure, outline of performance measurement strategies, and elaboration of processes for ongoing evaluation and assessment; engagement of other DOH department representatives is described; quality plan fits within the framework of other statewide QI/QA activities; staff and providers are aware of the plan and are involved in reviewing and updating the plan.				
Comment:					
A.2. Are appropriate performance and outcome measures selected, and methods outlined to collect and analyze statewide performance data?					

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# How to Best Use These Tools...



- Comparison against ‘golden standard’
- Identification of program priorities
- Evaluation of your quality program



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# Assessment Instructions

1. Pair up with another participant whose funding and program size are similar to yours
2. Identify your appropriate Part-specific NQC/HIVQUAL Organizational Assessment Forms in the Guide
3. Each person in the pair will take turns interviewing each other using the appropriate assessment form
4. Each interview should take 20 minutes or less
5. After the interviews, start with the break

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Pair up and let's go!

Return by X:XX

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## Key Findings Instructions

1. Summarize your findings and recommendations for your partners program based on the previous assessment discussion and complete the M14 Organizational Assessment Comment Sheet (pg 153) – 10 min
2. Share your summary recommendations with your partner and answer any questions – 10 min (take turns)

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# How to Conduct an Organizational Assessment

## Framing Questions:

- What are your best practices and suggestions to set the appropriate environment before the assessment?
- How can you engage providers to be honest assessing their quality management program?
- How can you best link assessment findings with improvements to the quality management program?

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# How to Conduct an Organizational Assessment

- Share the tool in advance with those you conduct the assessment
- Clarify the expectation for the assessment as an opportunity for improvement (and diffuse any anxiety)
- Ask providers to self-assess in advance of meeting
- Ask open ended questions (and score) vs question by question scoring
- Always go back to the scoring tool
- Share scoring and major findings at the end of the assessment

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# Resources

- NQC/HIVQUAL Quality Program Assessment Tools; [NationalQualityCenter.org](http://NationalQualityCenter.org)
- ‘HIVQUAL Workbook’ A guide for HIV providers to learn about quality management and quality improvement. A publication of the New York State Department of Health, AIDS Institute, 2006

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# National Quality Center (NQC)

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NationalQualityCenter.org

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**Module 15 – Day 2**  
**4:00pm – 4:30pm (30 min)**

**Action Planning Practicum**

**“A journey of a thousand miles  
must begin with a single step”  
-Lao Tsu**



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# Objectives

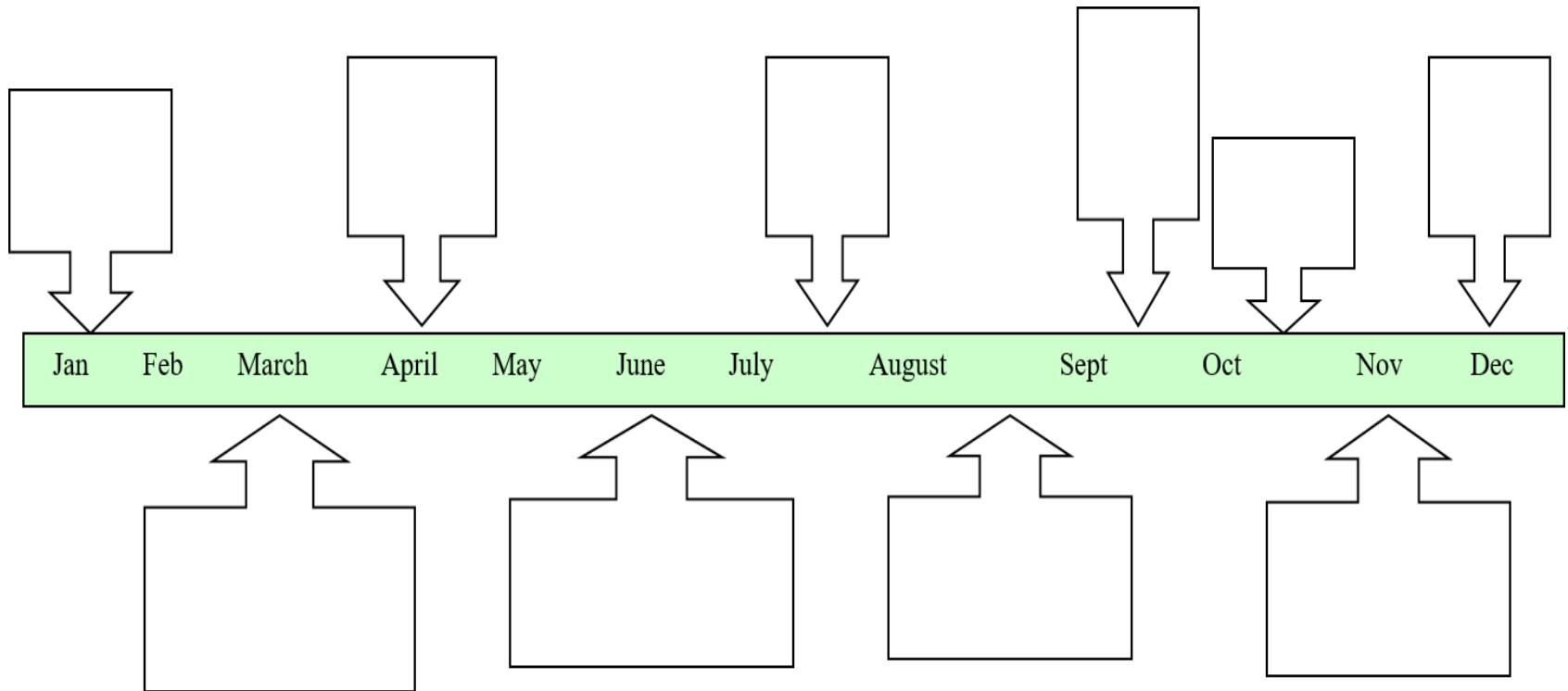
- Increase the confidence of participants around action planning for quality improvement
- Generate an action plan to improve the participant's quality management program

# Develop an Action Plan

GOAL: ESTABLISH AN EFFECTIVE HIV QUALITY MANAGEMENT PROGRAM													
2005 - 2006													
ACTIVITY	WHO	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Revise HIV quality management plan	John	X	X										
Develop annual quality workplan	John		X	X	X								
Prepare planning information (data collection, program assessment/evaluation, organizational priorities, HRSA grant) – for bimonthly meeting.	Mindy			X	X	DUE							
Review HIV quality management plan. Make changes if needed	Mindy					X	DUE						
Discuss and set annual goals	John		X			X	DUE						
Monitor implementation of plan Revise as needed	Committee			X				X				X	
Evaluate quality management program	Committee												X
Quality improvement project teams – at bimonthly meetings	Committee		X		X		X		X		X		X
Program goals	Committee		X				X						X
Annual organizational assessment	Committee	X											

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# Example: Annual QM Timeline Template Format



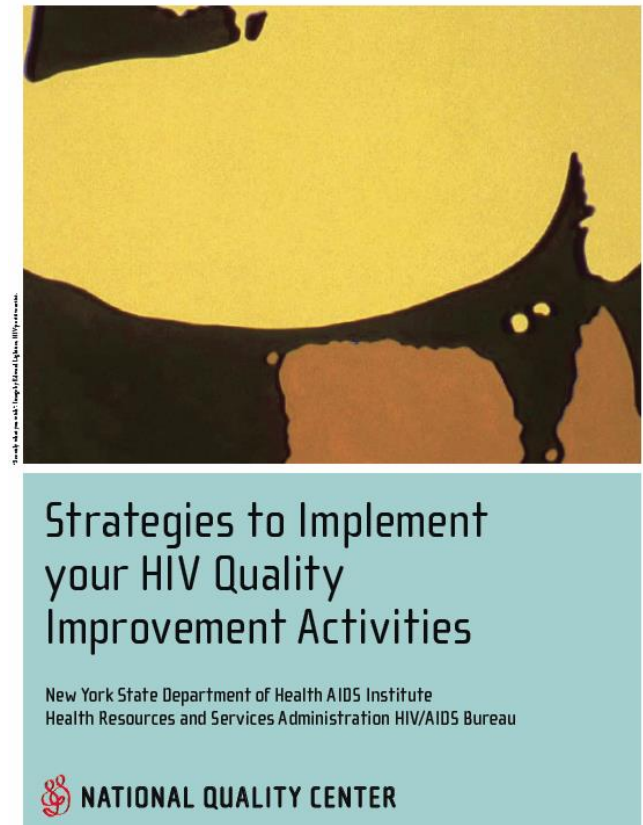
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# Individual Action Planning Instructions

1. Spend 15 minutes developing an action plan using the Quality Management Action Plan form in your guide
2. Focus on 3 main goals going forward
3. Share your action plan with your partner and get feedback; 15 mins total.

# NQC Resource

- NQC Guide: *'Strategies to Implement your HIV Quality Improvement Activities'*
- Purpose: to facilitate the translation of strategic and operational quality priorities into effective improvement actions
- Guide includes: real world examples, practical suggestions, short statements from providers in the field, actual tools, take home messages and resources



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“A good plan implemented today is better than a perfect plan implemented tomorrow.”

-George Patton

- When it is obvious that the goals cannot be reached, don't adjust the goals, adjust the action steps. Confucius
- Action is the foundational key to all success. Pablo Picasso
- “A goal without a plan is just a wish.” — Antoine de Saint-Exupéry
- “If you don't know where you are going, you'll end up someplace else.” — Yogi Berra

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**Module 16 – Day 2**  
**5:00pm – 5:30pm (30 min)**

**Nightmares and Successes in Facilitating  
Groups**

*“Success is the sum of small efforts,  
repeated day in and day out”*

**Robert Collier**



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# Introductions – Facilitation Stories

5 people have volunteered to share with the group some aspect of facilitation success they have enjoyed, or an instructive facilitation nightmare

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# Potential Facilitation Topics

- Thinking back to when you have facilitated a group process, which one is the most memorable (good or bad)? Why?
- Who is the most gifted facilitator you have experienced? Why?
- Managing a committee is often not easy. Share one story in which you experienced a barrier involving group dynamics and/or resistance to change.
- Which tools and resources have you found most helpful to manage a committee?

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# Sharing Experiences

*"If at first you do succeed,  
try not to look too surprised."*

Anonymous

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**Module 17 – Day 2**  
**5:30 – 6:00 pm (30 min)**

**Sharing of Aha! Moments &  
Day 2 Evaluation**

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## Highlights & Aha! Moments

- What have been some of your personal highlights or Aha! Moments from today's session?
- Use the next 2 minutes to reflect on today, identify a few ideas

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The way the course was delivered today was an effective way for me to learn.

- A. Strongly Disagree
- B.
- C. Agree
- D.
- E. Strongly Agree

---

My knowledge and/or skills increased as a result of  
today.

- A. Strongly Disagree
- B.
- C. Agree
- D.
- E. Strongly Agree



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How ready are you to facilitate a quality management committee and/or quality improvement team?

- A. Not Ready
- B.
- C. Mostly Ready
- D.
- E. Very Ready

---

How ready are you to conduct an organizational assessment of the QM program?

- A. Not Ready
- B.
- C. Mostly Ready
- D.
- E. Very Ready

---

## How cool are these little remotes?

- A. Awesome stuff
- B. Very cool
- C. They are okay
- D. Eh
- E. Are you kidding me?

---

# Evaluation

Went well.....

Do differently.....

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# Volunteers Needed For Tomorrow

We need 3 volunteers for the Human Diffusion Curve Exercise tomorrow. These individuals will 'sell' an innovative idea within 1 minute to the entire group during this interactive exercise. Ideas for innovations are provided....

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# Potential Innovations

- free cell phones for patients: appointment calls, medication alarms, 100 free minutes; charged at clinic, local phone provider provides them to the clinic at no cost
- device for time studies: bracelet for patients which automatically tracks times within the clinic, \$1000 per clinic
- subcutaneous HAART medication device: 100% adherence, clinical study, low risk to patient
- other innovative ideas?

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