



CQII's Online Training Program Concept Paper - *QI Learning Lab*

A) Overview

Introduction

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 advanced QI training programs, virtual affinity sessions, and its inaugural virtual QI training programs (as part of the end+disparities ECHO Collaborative and the Boot Camp), CQII is currently in the process of expanding its training modalities by launching a new virtual QI training program, called *QI Learning Lab*. Aligned with the HRSA goals to "improve patient care, patient health outcomes, and patient satisfaction," the Learning Lab is comprised of multiple independent courses, including Beginner QI 101, Intermediate QI, Advanced QI, Expert QI, and Experience-based Co-Design (EBCD) in QI Learning Labs. By June 2020 (Year 1), CQII plans to launch the Beginner, Advanced, and EBCD Learning Labs, while the Intermediate and Expert Labs will be implemented in Year 2 (July 2021-June 2022).

Each Lab will be offered independently every four months on a pre-determined annual schedule; for instance, the Beginner Lab will start March 2021, June 2021, and November 2021. Each Lab lasts 3-months and consists of six 90-minute virtual sessions every two weeks, and an orientation session. Participants register for the most relevant Lab based on their individualized training needs; some will opt to take the Beginner Lab first before registering for the Intermediate Lab, while others may only take the Advanced QI Lab given their prior QI experience. All Labs are fully integrated into other CQII offerings; for example, recipients with HIV/AIDS Bureau (HAB)-approved technical assistance requests are encouraged to enroll in the next available course that best meets their QI needs, CQII collaborative participants in need of additional QI training are assigned to the most appropriate upcoming Learning Lab.

Registration

HIV providers at RWHAP-funded agencies and PWH are encouraged to sign up for upcoming sessions. PWH are encouraged to register 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.

Participants register for a Lab via CQII's online registration portal (SurveyMonkey). The registration form will request basic demographic and contact information about the learner and his/her HIV agency, the individual commitment and the level of agency leadership support to complete all Lab assignments, involvement in current and past QI projects, and personal goals for completing the training. A standardized QI assessment tool is being used across all Labs to assess the individual QI proficiency and – for the 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 entire Lab-specific curriculum, which outlines expectations, session dates, pre-work assignments, Zoom links, assignment due dates, and any other pertinent information. In addition, all participants gain automatic access to shared QI folders on Glasscubes. The curriculum is outlined below for each Lab, including agenda topics for each session and homework assignments. Web cameras are provided as needed for the duration of the course to ensure that all learners can actively participate via Zoom.

Each Lab is limited to up to 15 participating agencies, with a minimum of 5 agencies; except for EBCD in QI with 10 participating agencies. Each agency is encouraged to sign-up as a cross-functional team, which includes a data person and an individual with lived experience. 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, they are automatically enrolled in the next Lab, starting four months later. Waiting lists are maintained for each Lab in case a participant drops out before the start of the Lab.

Learning Lab Details

Each 90-minute session (six in total for each Lab) is highly interactive, uses case-based learning with real-world HIV examples addressing gaps along the HIV care continuum, includes a review of participant homework assignments, and allows sufficient time for discussions with Lab faculty members and peer participants. All participants directly apply the course materials by launching a QI project within the context of a RWHAP agency or using provided HIV data sets for the Beginner Lab.

Each participant is expected to actively participate in all Lab sessions and complete all deliverables. The course design requires participants to prepare their assignments and report back at every session. If participants miss a session, they have access to the recorded session and are provided with instructions on any assignments that need to be completed. All registration information, assignment submissions, and attendance information are tracked using spreadsheets and are routinely reviewed.

To sustain the impact beyond the Lab, a post-training session is scheduled 6 months after the onset of each Lab for the final report-back of QI projects to ensure the application of the training content in RWHAP-funded agencies. In addition, all graduates are invited to join future report backs from other classes to hear about innovative QI presentations by peer Lab graduates.

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

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.



To evaluate the impact of the Learning Lab, the CQII evaluator (UCSF) will outline an evaluation plan focusing on increased QI capacity building among participants, the effectiveness of QI efforts as evidenced by the successful implementation of their QI project, and active participation in Learning Lab activities. Pre-/Post-Lab QI competency tests and post-session surveys are routinely conducted. After the first year of CQII funding (after June 2021), UCSF will conduct a more detailed qualitative evaluation to further assess its impact and opportunities for improvement.

Learning Lab Overview

The following table provides an overview of the CQII Learning Lab offerings, including the purpose of the Lab, deliverables to have met 6 months after the onset of each Lab, targeted audiences, and implementation dates. The outlines are presented later in this document.

Table: Learning Lab Overview

Purpose	Deliverables	Target Audiences
Beginner QI 101 Learning Lab		
<ul style="list-style-type: none"> - To familiarize individuals with the basic concepts and practices of quality improvement - To assist participants in understanding performance data - To develop a simple QI project using presented QI tools 	<ul style="list-style-type: none"> - Increased individual QI capacity - Formation of an agency-specific QI team - A completed basic QI project using facility-level performance data or provided HIV data sets 	Providers or PWH new to QI; individuals need a refresher; agencies with low viral suppression rates; and referrals by HAB/CQII
Intermediate QI Learning Lab		
<ul style="list-style-type: none"> - To strengthen a working QI knowledge to implement an agency-specific QI project - To implement a multidisciplinary QI project that benefits their facility and clients 	<ul style="list-style-type: none"> - A completed QI project that focuses on the gaps along the HIV care continuum and is relevant for the agency - A data drill using facility-level performance data - A completed storyboard of the QI project 	Providers or PWH with a basic understanding of QI; familiarity with the Model for Improvement and PDSA Cycles; and routine access to their own performance data for their QI project
Advanced QI Learning Lab		
<ul style="list-style-type: none"> - 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 	<ul style="list-style-type: none"> - 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 Voice of the Customer Techniques to identify areas for improvement - A gap analysis by analyzing collected data and how these results compare to an ideal state - A completed QI storyboard with a focus on dissemination of results and sustainability 	Providers or PWH with strong QI proficiency; responsibility for the implementation of local QI projects; and past successful experience in applying QI principles and methodology to improving patient care
Expert QI Learning Lab		
<ul style="list-style-type: none"> - To build expertise in managing communities of learning (i.e., collaboratives, regional groups, cross-agency QI partnerships) 	<ul style="list-style-type: none"> - A completed coaching 360 and self-assessment and a personalized improvement plan to outline individual QI goals 	Providers or PWH with demonstrated high QI proficiencies; past experiences in successfully managing QI projects; familiarity of working



- To enhance the participants' expertise in coaching other HIV providers across a network or subcontractors	- A work plan for an upcoming or existing community of learning (e.g., collaborative, regional group, cross-agency QI partnership) - Completion of virtual/in-person QI exercises to build QI capacity among staff and PWH	with HIV providers across a network (i.e., Part A, Part B) or region (i.e., Regional Group); ideally, participants have extensive QI coaching experiences
Experience-based Co-Design (EBCD) QI Learning Lab		
- To build capacity among RWHAP staff and PWH to utilize a modified experience-based co-design methodology to understand and improve the experience of HIV care and services, by both those who provide care and receive care	- An equal number of interviews between staff and client stakeholders - Identification of "touchpoints" within the experience of the process area of focus - At least one workshop using the modified-EBCD methodology - One QI initiative based on the needed improvement of a touchpoint - Evidence of a more equitable and inclusive QI method using modified EBCD	Training teams that are comprised of PWH and providers in the same agency that has a foundation of working with PWH around QI; past TCQPlus graduates; and referrals by HAB/ CQII

Implementation

The following Table outlines the milestones to plan and implement the *Learning Lab* in Year 1 (by June 2021), which includes the launch of three Labs: Beginner QI 101, Advanced QI, and Experience-based Co-Design (EBCD) in QI. To further expand CQII's virtual training offerings, CQII will launch the remaining Learning Labs (Intermediate and Expert QI Labs) in Year 2 (July 2021-June 2022).

Table: Year 1 Learning Lab Milestones

<i>Month/Year</i>	<i>Activity</i>
Jul 2020	Faculty Planning Group Meeting across all Labs
Jul 2020	Assignment of Faculty Members for each Lab
Aug 2020	Concept Paper Development and Submission to HAB for Approval
Sep 2020	Initial Outline of Each Lab based on Concept Paper and Alignment across Lab Courses
Aug-Dec 2020	Development of Course Materials by Course Faculty: registration form, slides, handouts, homework assignments, presentation templates for report backs
Oct 2020	Submission of Learning Lab Concept Paper to HRSA HIV/AIDS Bureau
Jan-Feb 2021	Submission of Learning Lab slides and handouts to HRSA HIV/AIDS Bureau for approval
Feb 2021	Announcement of QI 101 Lab to RWHAP community and Initiation of Registration
Mar 2021	Launch of QI 101 Lab
Mar 2021	Announcement of Advanced QI Lab to RWHAP community and Initiation of Registration
Apr 2021	Launch of Advanced QI
May 2021	Announcement of EBCD in QI Lab to RWHAP community and Initiation of Registration
May 2021	Launch of EBCD in QI

Over the course of four years, CQII hopes to conduct up to 44 Learning Labs to reach approximately 615 participants across all Learning Labs.

Year	Length	# of Participants	Session Dates
Beginner QI 101 Learning Lab			



Year 1	3-month Lab with 6x Sessions [10 Labs: 2x Year 1; 3x Year 2; 3x Year 3; 2x Year 4]	15 agencies per course; 150 participants in total Years 1-4	Mar 21; Jul 21; Nov 21; Mar 22; Jul 22; Nov 22; Mar 23; Jul 23; Nov 23
Intermediate QI Learning Lab			
Year 2	3-month Lab with 6x Sessions [8 Labs: 2x Year 2; 3x Year 3; 3x Year 4]	15 agencies per course; 120 participants in total Years 2-4	TBD
Advanced QI Learning Lab			
Year 1	3-month Lab with 6x Sessions [9 Labs: 1x Year 1; 3x Year 2; 3x Year 3; 2x Year 4]	15 per course; 135 participants in total Years 1-4	Apr 21; Aug 21; Dec 21; Apr 22; Aug 22; Dec 22; Apr 23; Aug 23; Dec 23
Expert QI Learning Lab			
Year 2	3-month Lab with 6x Sessions [8 Labs: 2x Year 2; 3x Year 3; 3x Year 4]	15 per course; 120 participants in total Years 1-4	TBD
Experience-based Co-Design (EBCD) QI Learning Lab			
Year 1	3-month Lab with 6x Sessions [9 Labs: 2x Year 1; 3x Year 2; 3x Year 3; 1x Year 4]	9 per course; 90 participants in total Years 1-4	May 21; Sep 21; Dec 21 May 22; Sep 22; Dec 22 May 23; Sep 23; Dec 23

B) Learning Lab Descriptions

The following Learning Labs are outlined in detail below:

- [Beginner QI 101 Learning Lab](#)
- [Intermediate QI Learning Lab](#)
- [Advanced QI Learning Lab](#)
- [Expert QI Learning Lab](#)
- [Experience-based Co-Design \(EBCD\) in QI Learning Lab](#)



1) Beginner QI 101 Learning Lab

Purpose of Course/Brief Description: A working knowledge of quality improvement (QI) basics is essential for the implementation of efforts to improve HIV care. The Beginner QI 101 Learning Lab is designed to familiarize individuals with the basic concepts and practices of QI. The purpose of this Lab is to build the capacity among HIV providers and people with HIV (PWH) using basic QI methodologies, tools, and techniques, and to conduct a QI project at local Ryan White HIV/AIDS Program (RWHAP)-funded agencies using facility-level performance data or provided HIV data sets. A mock case study is used throughout this Lab to illustrate the implementation of an HIV-specific QI project. The assigned Learning Lab faculty assists participants to understand their performance data and to develop a simple QI project.

Learning Objectives: Participants of this Learning Lab will learn how to...

- Develop and conduct a basic QI project in their facility using their own performance data or provided HIV data sets
- Increase individual QI capacity to use basic QI tools and techniques
- Increase understanding of the external QI mandates and their application, including PCN #15-02
- Form an agency-specific QI team

Outputs/Deliverables:

- Increased individual QI capacity
- Formation of an agency-specific QI team
- A completed basic QI project using facility-level performance data or provided HIV data

Target Audience(s): This Lab addresses the training needs of providers and PWH at RWHAP-funded recipients/subrecipients who are new to quality improvement, individuals needing a QI refresher, representatives from newly funded RWHAP organizations, agencies with low viral suppression rates committed to design and implement a QI project, and referrals by HIV/AIDS Bureau or CQII.

Selection Criteria for Participation:

- Commitment to attend all six classes
- Access to a webcam and Microsoft Office software products, such as Excel
- Access to local performance data set – derived from their agencies' data collection system
- Completion of all homework assignments and submission to faculty as required

Faculty: Kevin Garrett, Julia Schlueter, Jane Caruso

Support Staff: Zainab Khan



Beginner QI 101 Lab	Topics/Agenda	Homework Report Back	Next Homework Assignment
Pre-Work	<ul style="list-style-type: none"> • Discuss the purpose and goals of the Learning Lab • Introduce faculty and participants • Discuss expectations of conducting a QI project • Discuss the expectations of using Zoom technology 	[NA]	<ul style="list-style-type: none"> • Review the PCN 1502 (on your own) and complete a brief quiz • Examine your data and determine if you have access to enough data to report on a QI project, • Sign up for Glasscubes
1. Introduction to QI	<ul style="list-style-type: none"> • Setting the Stage • Policy Clarification Notice (PCN) #1502 <ul style="list-style-type: none"> ○ Infrastructure ○ Performance Measurement ○ Quality Improvement (QI vs QA; system vs process) • Introduction to Data: What are they telling you? How to collect the data, store, and use them? (qualitative vs quantitative) • Basic QI Tools <ul style="list-style-type: none"> ○ Run Chart – when to use them (one thing over time) ○ Pie Chart ○ Bar Chart 	[NA]	<ul style="list-style-type: none"> • Create a Run Chart, Pie Chart, and Bar Chart (using agency data or provided data set)
2. Defining Your QI Project Structure	<ul style="list-style-type: none"> • Review Homework Assignment • Model for Improvement: Use of a mock case study • What Are We Trying to Improve? <ul style="list-style-type: none"> ○ Aim Statement ○ Project Charter • How Do We Know our Change is an Improvement? <ul style="list-style-type: none"> ○ Performance measurement – relevant measures ○ What makes a “good” measure? ○ Why is it so important in this step? ○ Outcome vs Process measures • What Change Can We Make that will Lead to an Improvement? <ul style="list-style-type: none"> ○ Brainstorming ○ Priority Matrix ○ 5 Whys 	Report back of charts made	<ul style="list-style-type: none"> • Develop an Aim Statement • Develop Project Charter
3. Introducing the PDSA Cycle	<ul style="list-style-type: none"> • Introduction of the PDSA Cycle (starting small, iterative cycles, briefly define each step) • Plan Cycle: <ul style="list-style-type: none"> ○ Share what we think goes in the Plan step 	Report back of Aim Statement and Project Charter	<ul style="list-style-type: none"> • Create a Data Collection Plan • Create a Timeline

	<ul style="list-style-type: none"> ○ Develop a data collection strategy: who collects what, where is it stored, how often is it collected, who can retrieve and run it? ○ What are the measures? What data collection tool will be used? ○ Define infrastructure – team roles and responsibilities ○ Develop project work plan 		
4. “DSA” of the PDSA Cycle	<ul style="list-style-type: none"> ● Do and Document Cycle: Check Sheet and Observations ● Study Cycle (use a tool or study technique after the first cycle vs a different tool as more data to work with; use a mock case study to provide different examples of tools) <ul style="list-style-type: none"> ○ Line Chart, Pie chart if enough data ○ Using Excel templates ● Act Cycle: <ul style="list-style-type: none"> ○ Using your data to guide actions ● Documenting your completed PDSA Cycle 	Report back of data collection plan and timeline	<ul style="list-style-type: none"> ● Complete PDSA Template: ● Complete one Cycle or use the mock case study example ● Be specific in the Study Cycle: share your own data and demonstrate a tool to use, justify the application ● In your own project, how does the Study Cycle impact how you “act” and what the data told you ● Or use past QI project to revitalize or put into the PDSA Cycle as described
5. Sharing and Sustaining Your Gains	<ul style="list-style-type: none"> ● Data Visualization concepts and guidelines ● Sustainability and What It Means ● How to Communicate the Impact of Your QI work to PWH 	Report back on your completion of a PDSA template	<ul style="list-style-type: none"> ● Use the Sustainability Toolkit and choose 1 of the 12 domains to focus on. Create a plan to implement it.
6. Evaluation of QI Projects	<ul style="list-style-type: none"> ● Different Methods of Evaluating QI Project ● What are the important components of a thorough evaluation? ● Using QI Project evaluation Check Sheet and other Tools 	Report back on 1 Sustainability Toolkit domain.	<ul style="list-style-type: none"> ● Present the proposed QI project to the faculty 1 month after the completion of session 6 ● Present the completed QI project in six months to the class ● Evaluate using Red light, yellow light, green light
Post-Work (after 6-month)	<ul style="list-style-type: none"> ● QI project follow-up case presentations ● Completion of Post-Lab QI Competency 	Report back of QI projects	



2) Intermediate QI Learning Lab

Purpose of Course/Brief Description: Continuously improving the working quality improvement (QI) knowledge is essential for any HIV-care focused organization. The purpose of this Intermediate QI Learning Lab is to further strengthen the QI capacity among Ryan White HIV/AIDS Program (RWHAP)-funded providers and people with HIV (PWH) using intermediate QI methodologies, tools, and techniques and to implement a multidisciplinary QI project with measurable improvement goals that benefit local RWHAP agencies and clients. Individual feedback is provided by the Learning Lab faculty to discuss ideas for QI projects and adequate infrastructure/internal supports, and to assist QI projects throughout the Lab.

Learning Objectives: Participants of this Learning Lab will learn how to...

- Develop, conduct, and complete a multidisciplinary QI project using local performance data on a topic that focuses on local gaps along the HIV care continuum and is relevant to the agency
- Conduct a data drill using facility-level performance data
- Complete a storyboard of the QI project by showing performance data over time, completed PDSA Cycles, and impact/evaluation of the improvement efforts

Outputs/Deliverables:

- A completed QI project using local performance data on a topic relevant to the agency
- A multidisciplinary QI team that has fully executed multiple PDSA Cycles
- An agency-specific data drill down using local performance data
- A completed storyboard of the QI project using a provided template

Target Audience(s): This Lab addresses the needs of providers and PWH at RWHAP-funded recipients/subrecipients who have conducted a QI project in the past regardless of QI methodology. Participants have familiarity with the Model for Improvement and PDSA Cycles, the necessary leadership support to design and implement a QI project, and routine access to their performance data.

Selection Criteria for Participation:

- Commitment to attend all six classes and homework assignments
- Routine access to local performance data set that is derived from the agency's data collection systems
- Commitment to conduct a local QI project that addresses gaps along the HIV care continuum
- Necessary support by agency leadership to meet all Lab expectations

Faculty: Kevin Garrett, Julia Schlueter, Jane Caruso

Support Staff: Zainab Khan



Intermediate QI Learning Lab	Topics/Agenda	Homework Report Back	Next Homework Assignment
Pre-Work	<ul style="list-style-type: none"> • Discuss the purpose and goals of this Learning Lab • Introduce faculty and participants • Discuss expectations of conducting a local QI project • Review the timeline and homework schedule • Inform participants how to set up a time to meet with faculty to discuss ideas for the QI project • Schedule a meeting with their internal QI team 	[NA]	<ul style="list-style-type: none"> • Sign up for Glasscubes
1. Diving Deeper into Your Data	<ul style="list-style-type: none"> • Using QI Tools to better understand your data: <ul style="list-style-type: none"> ○ Drilling Down Data ○ Deeper stratification ○ Introduce the Disparity Calculator ○ Histograms (simple histogram) - link to past presentations on TargetHIV • Variation Concepts • Qualitative data including PHW feedback 	No report back	<ul style="list-style-type: none"> • Build a histogram • Stratify your performance data by at least 2 categories (e.g., Black MSM) • Plug stratification into the Disparity Calculator
2. Defining Your QI Project Structure	<ul style="list-style-type: none"> • What Are We Trying to Improve? <ul style="list-style-type: none"> ○ A3 – simplified ○ Aim Statement ○ Including data collection plan • How Do We Know a Change is an Improvement? <ul style="list-style-type: none"> ○ Performance Measures ○ Outcomes/Process/Sub-process ○ Measurement Tree – simple version 	Report back of histogram, stratified data, and Disparity Calculator results	<ul style="list-style-type: none"> • Begin to fill out A3 • Write an Aim Statement • List 2 performance measures for QI project
3. What Change Can We Make that will Lead to an Improvement	<ul style="list-style-type: none"> • Identifying Root Causes: <ul style="list-style-type: none"> ○ Fishbone ○ Pareto Chart ○ Current Process Map • Selecting your Interventions and Identifying Improvements: <ul style="list-style-type: none"> ○ Affinity Diagram ○ Building consensus – voting, fists of five ○ Priority Matrix ○ Force Field 	Report back of A3, Aim Statement, and two performance measures	<ul style="list-style-type: none"> • Pick one tool to identify Root Causes • OR • Pick one tool to identify improvement interventions
4. PDSA Cycle Revisited and Focus on Planning	<ul style="list-style-type: none"> • Recap of the PDSA Cycle: <ul style="list-style-type: none"> ○ Emphasize iterative nature ○ Reach the goal, raise the bar ○ It is continuous! • Focus on Planning a QI Project: <ul style="list-style-type: none"> ○ Infrastructure and QI Team 	Report back of tool Root Causes or improvement interventions	<ul style="list-style-type: none"> • Construct a more detailed team, roles/responsibilities, who do you need to make this QI project successful OR

	<ul style="list-style-type: none"> ○ QI Team selection matrix guide ○ Planning Tools ○ Continue to fill out A3 ○ Data collection plan, including sub-process measures ○ Gantt Chart (ASQ template) ○ Future process map 		<ul style="list-style-type: none"> ● Construct a future process map
5. “Do/Study/Act”	<ul style="list-style-type: none"> ● Do Cycle: <ul style="list-style-type: none"> ○ Documentation (CMS template) ○ Gantt chart review ● Study Cycle: <ul style="list-style-type: none"> ○ Process measures/sub-process measures ○ Importance of having on-going dataset over time ○ Variation ○ Picking the right tool for data analysis <ul style="list-style-type: none"> ▪ Stacked bar chart ▪ Run chart ● Act Cycle: <ul style="list-style-type: none"> ○ Adapt <ul style="list-style-type: none"> ▪ During initial PDSA cycles ▪ Expand to a few more patients, staff, etc. ○ Adopt (changing the way you do business) <ul style="list-style-type: none"> ▪ Standardization across agency ▪ Visualization ▪ Storyboards ▪ Based on your audience ▪ Sharing your outcome measures ○ Abandon <ul style="list-style-type: none"> ▪ Never abandon after the first or second PDSA cycle 	Report back of team or future process map	<ul style="list-style-type: none"> ● Document your first PDSA Cycle using the templates
6. Evaluation	<ul style="list-style-type: none"> ● Evaluate the success of your QI project <ul style="list-style-type: none"> ○ QI project evaluation form ● Celebrate <ul style="list-style-type: none"> ○ Identify the big and small ways to celebrate. It’s not just a pizza party! ● Sustainability <ul style="list-style-type: none"> ○ Continue to monitor your performance from your last QI project with less frequency ○ Previous TA call info on sustainability/sustainability elements ● Future <ul style="list-style-type: none"> ○ Applying what you have learned to future QI projects 	Report back of PDSA Cycle	<ul style="list-style-type: none"> ● Reconvene in 1 month for lightning round slides ● Present QI project plan and what data supports your QI project selection ● Reconvene in 6 months to review your completed QI project ● Celebrate your accomplishments
Post-Work (after 6-month)	<ul style="list-style-type: none"> ● QI project follow-up case presentations 	Report back of QI projects	



	<ul style="list-style-type: none">• Completion of Post-Lab QI Competency		
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3) Advanced QI Learning Lab

Purpose of Course/Brief Description: The purpose of the Advanced QI Learning Lab is to reinforce 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.

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

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.

Selection Criteria for Participation:

- Completion of formal QI training courses offered by CQII, hospitals, State Departments of Health, or private vendors (e.g., IHI)
- Demonstration of successful completion of past QI projects that include the use of basic and intermediate QI tools, such as fishbone diagram, flowcharting, brainstorm, priority setting
- Demonstrated experience with performance measurement as evidenced by
 - Experience with submitting performance data reports
 - Experience with data collection and data tools, including working with a data manager, use of disparity calculator
 - Experience with data analysis
 - Experience with developing quality measures – quantitative and qualitative



- Commitment to attend all classes, homework assignments with the QI project team, and meetings with faculty members
- Commitment to complete a QI project that is already in progress or is newly initiated as part of this Lab to improve viral suppression outcome

Faculty: Chuck Kolesar, Justin Britanik, Susan Weigl, Nanette Brey (planning only)

Support Staff: Alejo Carbajal

Advanced QI Learning Lab	Topics/Agenda	Homework Report Back	Homework Assignments
Pre-Work Orientation Session	<ul style="list-style-type: none"> • Set the stage and expectations for Lab • Introduce faculty, participants, and virtual technologies • Complete Pre-Lab QI Competency Assessment • QI Principles and DMAIC Framework • Define Improvement Opportunity • QI Tools: DMAIC Project Charter • Context, Rationale and Problem Statement • Q&A about the Lab • Next steps 	[NA]	<ul style="list-style-type: none"> • Complete Pre-Lab QI Competency Assessment • Agree on improvement area of the upcoming QI project • Set up the QI team and membership • Bringing consumers and other stakeholders to the table • Start DMAIC Project Charter by completing a preliminary assessment of organizational context/issues • Become familiar with Zoom and sign up for Glasscubes
1. QI Project Define	<ul style="list-style-type: none"> • Review • Check-In & Peer Exchange • Refining QI Project Focus • Completing a SIPOC Diagram— Stakeholders, Input, Process, Output, Customers • Scoping your project • Next Steps 	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"> • Meet with your QIP team • Familiarize the team with the use of DMAIC Project Charter and begin filling out background information and data • Complete a SIPOC diagram • Scope your QI Project • Document QI Project Scope on your DMAIC Project Charter QI Project
2. Measure Phase I: Describe a Process	<ul style="list-style-type: none"> • Group Exercise • Check-In & Peer Exchange • Planning Your Gemba Walk • Voice of the Customer • Techniques and Tools • Opportunities for Improvement • Action 	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"> • Meet with your QI Project Team • Plan a Gemba Walk and implement after Session 3 • Discuss and select at least one new technique and tool to gather data

			<p>on customers' perspective</p> <ul style="list-style-type: none"> • Add Customer's perspective to your DMAIC Project Charter
3. Measure Phase II	<ul style="list-style-type: none"> • Group Exercise • Check-in, Peer Exchange and Reflection • Overview – Measure II Phase • Data Collection Plan • Measuring Systems and Types of Measures • Measuring a Process • Tools: Value Stream Mapping • Advanced Metrics • Measuring Improvement Cycles • Next Steps 	<p>Report back of Updated A3 Define Phase Gemba Walk Customers/Stakeholders Customer Requirements</p>	<ul style="list-style-type: none"> • Meet with your QI Project Team • Complete measures in your SIPOC Diagram • Create a data collection Plan • Analyze results of your Gemba Walk with QIP Team • Create a VSM with measures • Update your progress on your DMAIC Project Charter Project Charter
4. Analyze	<ul style="list-style-type: none"> • Group Exercise • Check-in, Peer Exchange and Reflection • Overview - Analysis Phase <ul style="list-style-type: none"> • Key steps and DMAIC Project Charter Questions • Data Analysis • Process Analysis • Root Cause Analysis • FMEA – Failure Mode Effects Analysis • Next Steps 	<p>Report back of Updated A3 Assessment of Current Condition Picture of VSM – Value Stream Map Data Collection Plan</p>	<ul style="list-style-type: none"> • Meet with your QI Project Team • Create visual tools to display your data • Analyze all data collected from Gemba Walk, VSM, VOC • Determine root causes (fishbone, FMEA) • Update your progress on your DMAIC Project Charter Project Charter
5. Improve	<ul style="list-style-type: none"> • Group Exercise • Check-in, Peer Exchange and Reflection • Improve and Implement Phase • Key Steps and DMAIC Project Charter Questions • Tools (priority matrix, risk assessment, challenges) • Future State VSM • Solutions and small tests of change • Implementation work plan • Try a simple Kanban Board • Taking Action 	<p>Report back of Updated A3 – Analysis Root Cause Analysis</p>	<ul style="list-style-type: none"> • Meet with your QI Project Team • Discuss and respond to Improve Phase DMAIC Project Charter questions • Application of Tools • Results of your prioritization, FMEA analysis (risk assessment) and challenges
6. Sustain and Control	<ul style="list-style-type: none"> • Group Exercise • Check-in, Peer Exchange and Reflection • Control and Sustain Phase • Key Steps and DMAIC Project Charter Questions 	<p>Report back of Updated A3 - Improve Solutions -Future State Process -Implementation Plan</p>	<ul style="list-style-type: none"> • Meet with your QI Project Team <ul style="list-style-type: none"> - Continue each QIP Phase - Discuss and respond to Control and Sustain Phase DMAIC Project Charter questions



	<ul style="list-style-type: none"> • Tools (Statistical Control - Control Charts; Process Control - Visual Controls • Sustain and Standardize Work (Standard Operating Procedure (SOP) • Training Plan • Taking Action 		<ul style="list-style-type: none"> - Application of Tools and update your DMAIC Project Charter • Create a control and sustain plan <ul style="list-style-type: none"> - Control Charts, Visual Controls - Gap analysis between actual and desired performance, Team Kanban Huddles - Standardize work (SOP), Training Plan - Update your progress on your DMAIC Project Charter Project Charter
Post-Work Storyboard Presentations (after 6-month)	<ul style="list-style-type: none"> • Celebrate Success • Dissemination of Results • Completion of Post-Lab QI Assessment 	N/A	<ul style="list-style-type: none"> • Dissemination of QI project results • Next QI project steps



4) Expert QI Learning Lab

Purpose of Course/Brief Description: The purpose of this Expert QI Learning Lab is to enable Ryan White HIV/AIDS Program (RWHAP)-funded providers and people with HIV (PWH) to enhance their already high QI competencies and apply their expertise in managing communities of learning (i.e., collaboratives, regional groups, cross-agency QI partnerships) and in coaching other HIV providers across a network or subcontractors. Participants of this Lab have to demonstrate the successful implementation of local QI projects prior to being accepted.

Learning Objectives: Participants of this Learning Lab will learn how to...

- Develop a personalized improvement plan to set individual QI goals
- Develop or update a work plan for an upcoming or existing community of learning (e.g., collaborative, regional group, cross-agency QI partnership)
- Build knowledge and experience conducting virtual/in-person QI exercises that increase interactivity to build QI capacity

Outputs/Deliverables:

- Completed a 360 coaching self-assessment and reflections
- Developed a personalized improvement plan to outline individual QI goals
- Developed or updated a work plan for an upcoming or existing community of learning
- Conducted virtual/in-person QI exercises to increase interactivity to build capacity for QI

Target Audiences(s): This Lab targets individuals who have demonstrated high QI proficiencies, past experiences in successfully managing QI projects, and familiarity of working with a group of HIV providers across a network (i.e., Part A, Part B) or region (i.e., Regional Group). Ideally, participants have extensive QI coaching experiences and manage a network of HIV providers.

Selection Criteria for Participation:

- Demonstration of a high level of QI proficiency
- Successful completion of Advanced QI Learning Lab or equivalent
- Successful management of all aspects of a QI project
- Access to a network of HIV providers or subrecipients, including Part A or Part B network, Regional Group, regional collaborative, cross-agency QI partnership
- Ability to apply Expert QI Learning Lab course material to HIV providers across a provider network or region
- Commitment to attend all classes, homework assignments with the QI project team, and meetings with faculty members

Faculty: Chuck Kolesar, Justin Britanik, Susan Weigl, Nanette Brey, Clemens Steinbock

Support Staff: Alejo Carbajal



Expert QI Learning Lab	Topics/Agenda	Assignment Discussion	Next Assignment
Pre-Work	<ul style="list-style-type: none"> • Setting the stage and expectations for Lab • Introduction to Faculty, participants and virtual technologies • Completion of Pre-Lab QI Competency Assessment • Completion of QI Coaching 360-Assessment • Q&A about the Lab 	[NA]	<ul style="list-style-type: none"> • Complete Pre-Lab QI Competency Assessment • Complete QI Coaching Self-Assessment • Send CQII 3 names to assess your QI Coaching Competency • Become familiar with Lab technologies, (Zoom, Glasscubes)
1. QI Coaching	<ul style="list-style-type: none"> • Welcome and Introduction • Overview of Lab • QI Interactive Exercise (TBD) • Frameworks for Coaching Quality Improvement Work • QI Self-Assessment/360 Assessment Results • Development of Individualized Improvement Plan • Homework Assignment 	Sharing of 360 QI Coaching Assessment Results	<ul style="list-style-type: none"> • Writing an Individualized Improvement Plan
2. Managing a Community of Learning	<ul style="list-style-type: none"> • Managing a Community of Learning • Collaborative Frameworks • Planning and Setting up a Collaborative, Regional Group, Cross-Agency QI Partnerships • Performance Measurement and Evaluation • Running Virtual Communities of Learning • Past HIV Collaboratives and Regional Groups • Homework Assignment 	Report back on Individualized Improvement Plan	<ul style="list-style-type: none"> • Outlining a Community of Learning Workplan (using a provided template) • 4-5 Volunteers to Play a QI Game (from a pre-determined list of interactive exercises)
3. Virtual/In-Person Interactive Exercises to Enhance QI Capacities	<ul style="list-style-type: none"> • Using Interactivity to Teach QI • Overview of QI Games and Virtual QI Exercises • Key QI Games by Volunteer Facilitators • Debriefing Virtual/In-Person Interactive Exercises • Homework Assignment 	Report back on Community of Learning Workplans QI Games by Volunteer Facilitators	<ul style="list-style-type: none"> • Assessing a Network of HIV Providers or Subrecipients (using a provided assessment tool) •
4. Managing a Network of QI Teams or Subcontractors	<ul style="list-style-type: none"> • QI Networks and PCN 15-02 • Establishing Partnerships and Contracts with Network/Subrecipients • Assessing QI Activities with Subcontractors • Identifying Subcontractors' TA and Training Needs • QI Monitoring vs QI Coaching 	Report back on Network QI Assessment	<ul style="list-style-type: none"> • Collecting the Necessary Information for Use in Expert QI Tools (using a provided data tool)



	<ul style="list-style-type: none"> • Running Network-wide QI Projects and Performance Measures • Homework Assignment 		
5. Expert QI Tools	<ul style="list-style-type: none"> • Introducing three Expert QI Tools • Expert SIPOC Diagram - KPIV, KPOV, Analysis • Expert Control Charts – such as EMWA, CuSum • Expert Metrics and Measurement Trees • Homework Assignment 	Sharing of Expert QI Tool Data	<ul style="list-style-type: none"> • Selecting and Using one Expert QI Tool with Local Data • 4-5 Volunteers to Present Their Expert QI Tools
6. Change Management	<ul style="list-style-type: none"> • Change Management Overview • Dealing with Resistance • Different Participants Behaviors and Interventions • Case Presentations • Group Facilitation Skills • Increasing Meeting Effectiveness • Homework Assignment 	Report back on Expert QI Tools	<ul style="list-style-type: none"> • Completing the 6-Month Presentation Template Slide Set
Post-Work (after 6-month)	<ul style="list-style-type: none"> • Report Back on QI Coaching • Report Back on Community of Learning Activities 	Report back of Slide Set and Experiences	[N/A]



5) Experience-based Co-Design (EBCD) QI Learning Lab

Purpose of Course/Brief Description: The purpose of this Experience-based Co-Design (EBCD) QI Learning Lab is to build capacity among people with HIV (PWH) and Ryan White HIV/AIDS Program (RWHAP)-funded providers to utilize a modified experience-based co-design methodology to understand and improve the experience of HIV care and services, by both those who provide care and receive care. Training teams that are comprised of PWH and providers from the same agency are the building blocks for this Learning Lab and the foundation of working with PWH around quality improvement (QI) going forward.

Learning Objectives: Participants of this Learning Lab will learn how to...

- Identify change ideas through modified EBCD methods to improve patient and provider experiences
- Build stronger partnerships between providers and PWH and strengthen QI projects and initiatives, which further impact and improve HIV-related healthcare outcomes and services
- Conduct qualitative interviewing to better understand patient and staff experiences during care and utilize methodologically appropriate coding qualitative interviews and data to identify key themes
- Synthesize and present qualitative findings to stakeholders on the experience of the process area of focus
- Identify key touchpoints and ideas for change to foster improvement in the experience of receiving and giving care in the process area of focus
- Create a more equitable and inclusive quality improvement method using modified EBCD in RWHAP-funded agencies

Outputs/Deliverables:

- A completed PDSA Cycle as a method to test one change idea from the modified-EBCD workshop
- A QI project presentation using a standardized reporting template and storyboard
- Several qualitative interviews between staff and client stakeholders
- Identification of several “touchpoints” within the experience of the process area of focus
- A workshop using a modified-Experience-based Co-Design Methodology
- Identification of one QI initiative based on the needed improvement of a touchpoint in the process area of focus

Target Audience(s): This Lab targets training teams that are comprised of PWH and providers from the same agencies that have a QI foundation of working with individuals with lived experiences. All training team members have demonstrated a sound QI background and familiarity with QI project methodologies. Past TCQPlus graduates are encouraged to participate.

Selection Criteria for Participating Training Teams:

- Funded as a RWHAP recipient or subrecipient; Part A/Part Bs can participate with identified subrecipient implementation sites



- Commitment by the training team to attend all activities throughout the 3-month learning engagement, including six 90-minute sessions every other week
- Commitment to conducting one experience-based co-design workshop and identify one QI initiative
- Ability and dedicated time to complete pre-work, assigned activities between sessions, and post-work activities
- Willingness to address power dynamics to create equity through improving clinical and community experiences

Faculty: Ginna Crowe, Dottie Dowdell, D’Ontace Keyes, Adam Thompson, Jennifer Lee

Support Staff: Alejo Carbajal

EBCD in QI Learning Lab	Topics/Agenda	Assignment Discussion	Next Assignment
Pre-Work	<ul style="list-style-type: none"> • Introduce faculty and virtual tools • Introduce Pre-Lab QI Competency Assessment • Provide an overview of EBCD QI Learning Lab Expectations • Respond to questions or concerns raised by participant teams 	[NA]	<ul style="list-style-type: none"> • Complete Pre-Lab QI Competency Assessment • Identify the EBCD Team and the QI Project Process Area of Interest • Become familiar with Zoom and sign up for Glasscubes
1. Introductions and Setting up an EBCD Team for QI (PLAN)	<ul style="list-style-type: none"> • Outline of expectations to conduct a joint QI project using EBCD • Introduce EBCD as a methodology for QI • Review the Roles of the EBCD Advisory Group • Share Methods to Measure EBCD QI activities • Introduce the 4 encounter areas of focus for the EBCD Learning Lab • Review generic process maps for each of the 4 areas • Review generic storyboard tool 	Report back on experiences with QI and joint QI project topics	<ul style="list-style-type: none"> • Identify touchpoints in a care delivery Case Study • Adapt templates to agency-specific process map for the selected area of focus
2. Addressing the Importance of Power Dynamics and Carrying Out Observations (PLAN)	<ul style="list-style-type: none"> • Address power dynamics among all partners for the project • Carrying out observations • Recruiting staff and patients for interviews • Share experiences working with process mapping • Identify current agency placement on The Continuum of Patient Influence (Bate & Robert) • Reflect on past QI experiences and engagement of PWH in QI projects • Evaluate EBCD Team for equity in representation 	<p>Report back on touchpoints in a care delivery case study</p> <p>Report back on agency process map for the selected area of focus</p>	<ul style="list-style-type: none"> • Select a generic process or environment, and observe and document observations (EBCD Team Observation Activity) • Recruit staff and patients for interviews

	<ul style="list-style-type: none"> • Discuss methods to address power dynamics between patients and providers • Review expectations for patient and staff recruitment for interviews 		
3. Collecting the Experience of Patients and Staff (PLAN)	<ul style="list-style-type: none"> • Eliciting story and the value of collecting experience in QI • Qualitative interviewing • Demonstrate the value of eliciting story and experience in QI activities • Practice observation versus interpretation in qualitative data collection • Introduce methods to leverage technology for qualitative data collection • Introduce an Interview Guide for use in patient and staff interviews • Provide strategies to elicit touchpoints from patients and staff • Interview Guide specific to the 4 Areas of Focus • Empathy Mapping 	<p>Report back on EBCD Team Observation Activity</p> <p>Report back on the recruitment of staff and patients for interviews</p>	<ul style="list-style-type: none"> • Conduct at least 4 PWH Interviews and 4 Staff Interviews
4. Analyzing the Experience of Patients and Staff (PLAN)	<ul style="list-style-type: none"> • Coding and synthesizing of qualitative data • Sharing qualitative data and findings with stakeholders • Introduce methodologically appropriate methods of coding qualitative data for EBCD • Introduce methods to depict and present qualitative data • Build skills to analyze qualitative data to identify touchpoints • Utilize Word Clouds and Empathy Mapping 	<p>Report back on interview experience and initial thoughts</p>	<ul style="list-style-type: none"> • Code interview data for key themes • Create a presentation identifying key findings and touchpoints for the project selected Area of Focus
5. Conducting an EBCD Workshop (DO)	<ul style="list-style-type: none"> • Format, Facilitation, and Evaluation of EBCD Workshops • Storytelling as a Key Element of EBCD Workshops • Logistics Planning • Review sample agenda for a modified EBCD workshop • Explore opportunities to integrate storytelling into workshop activities • Share key logistics and planning elements for a successful modified EBCD workshop 	<p>Report back on identifying key findings and touchpoints for the project selected Area of Focus</p>	<ul style="list-style-type: none"> • Conduct the modified EBCD QI Project Workshop • Create a plan to implement the prioritized change idea • Prepare a final presentation on experience and outcomes with modified EBCD QI Project Workshop

6. Taking Action on EBCD Workshop Findings (DO)	<ul style="list-style-type: none"> • Experience with EBCD and Change Ideas • Reflections and next steps • Share experiences with conducting a modified EBCD workshop • Share key findings and themes from a modified EBCD workshop • Discuss next steps for implementation of identified quality improvement initiatives • 6 Month Project Report Template and Storyboard 	<p>Report back on a plan to implement the prioritized change idea</p> <p>Report back on a final presentation on experience and outcomes with modified EBCD QI Project Workshop</p>	<ul style="list-style-type: none"> • Plan and Do one PDSA cycle as a method to test one Change Idea from the modified-EBCD workshop • Report back on QI Project Outcomes at 6 months
Post-Work (after 6-month)	<ul style="list-style-type: none"> • QI follow-up impact assessment • Completion of Post-Lab QI Competency • Presentation of EBCD QI project • Complete one QI Project selected from change ideas developed through a modified-EBCD workshop • Large Group Peer Sharing 	<p>[N/A]</p>	<ul style="list-style-type: none"> • Implement changes based on feedback from peers and CQII expert faculty • Implement another change idea identified in the modified-EBCD workshop • Replicate modified-EBCD workshop for additional processes • Submit TA Request for additional Short-Term TA as needed

Monthly Office Hours in Month 4 and 5:

Provide assistance and capacity building related to the implementation of the QI Project. In addition, respond to participating agencies' requests and needs to complete QI projects.