Remote Control QI: Using Visual Tools to Collaborate Virtually

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2022

NATIONAL RYAN WHITE CONFERENCE ON HIV CARE & TREATMENT

Learning Objectives

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1. Identify and be able to apply facilitation and collaboration techniques to effectively manage a CQM program with virtual elements

2. Describe the skills needed to facilitate QI tools in a virtual environment

3. Explain key elements to ensure virtual collaboration is interactive and promotes asynchronous QI exchange

Virtual Problems & Opportunities

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- **Problems:**
  - New skill sets to develop – e.g., project management, technology, design.
  - Audiences have variable skills and familiarity with virtual tools and technologies
  - Reduced focus and attention of participants due to non-stop nearly identical video conferencing meetings
  - More preparation needed, facilitators doing double duty as host, notetaker, and discussion leader.
- **Opportunities:**
  - Bridge geographic divides
  - Efficiently uses time and resources
  - Multi-modal interactions for diverse learning styles
  - Increased control of content
  - Increased convenience

Virtual Burnout

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- Reality of home office – you're always in the office
- More flexibility can mean more expectations
- Exhaustion of always being on camera; every move recorded
  - Videoconferencing went from fun change of pace to 8+ hours a day non-stop in the spotlight
- Monitoring chats, shared screens, and colleagues faces simultaneously.
- Sitting in one place instead of walking around an office, facility, or campus to go to meetings.

How can we address these challenges?

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- We need to change the following to accommodate new ways of working!
  - Our skillsets
  - Our methods
  - Our environments
  - Our plans

Don't try and recreate the in-person experience virtually – instead, structure your meetings to take advantage of virtual opportunities while minimizing challenges

Before getting started…

Key Question:

Does this need to be a meeting?

Virtual Strategy | Working Asynchronously

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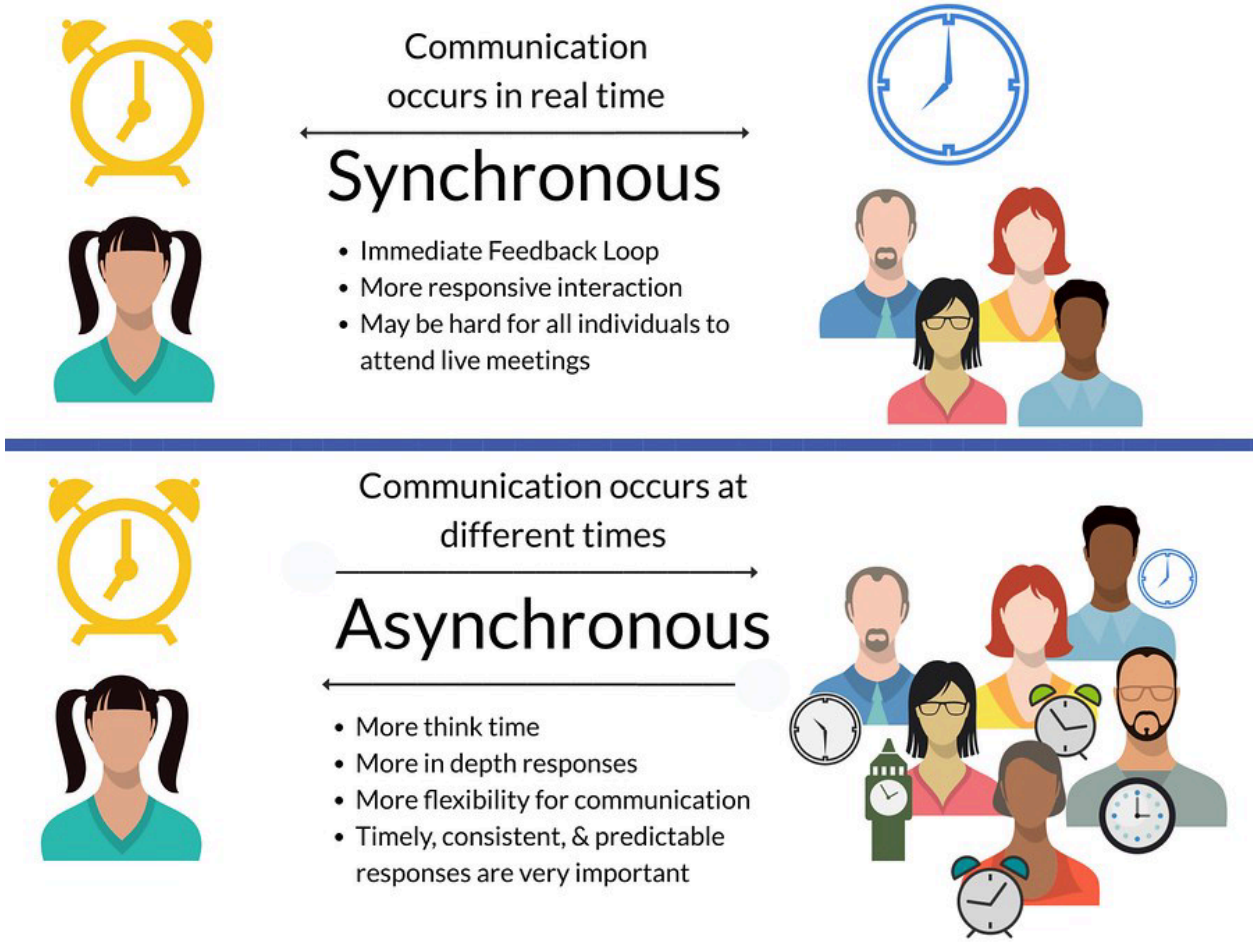
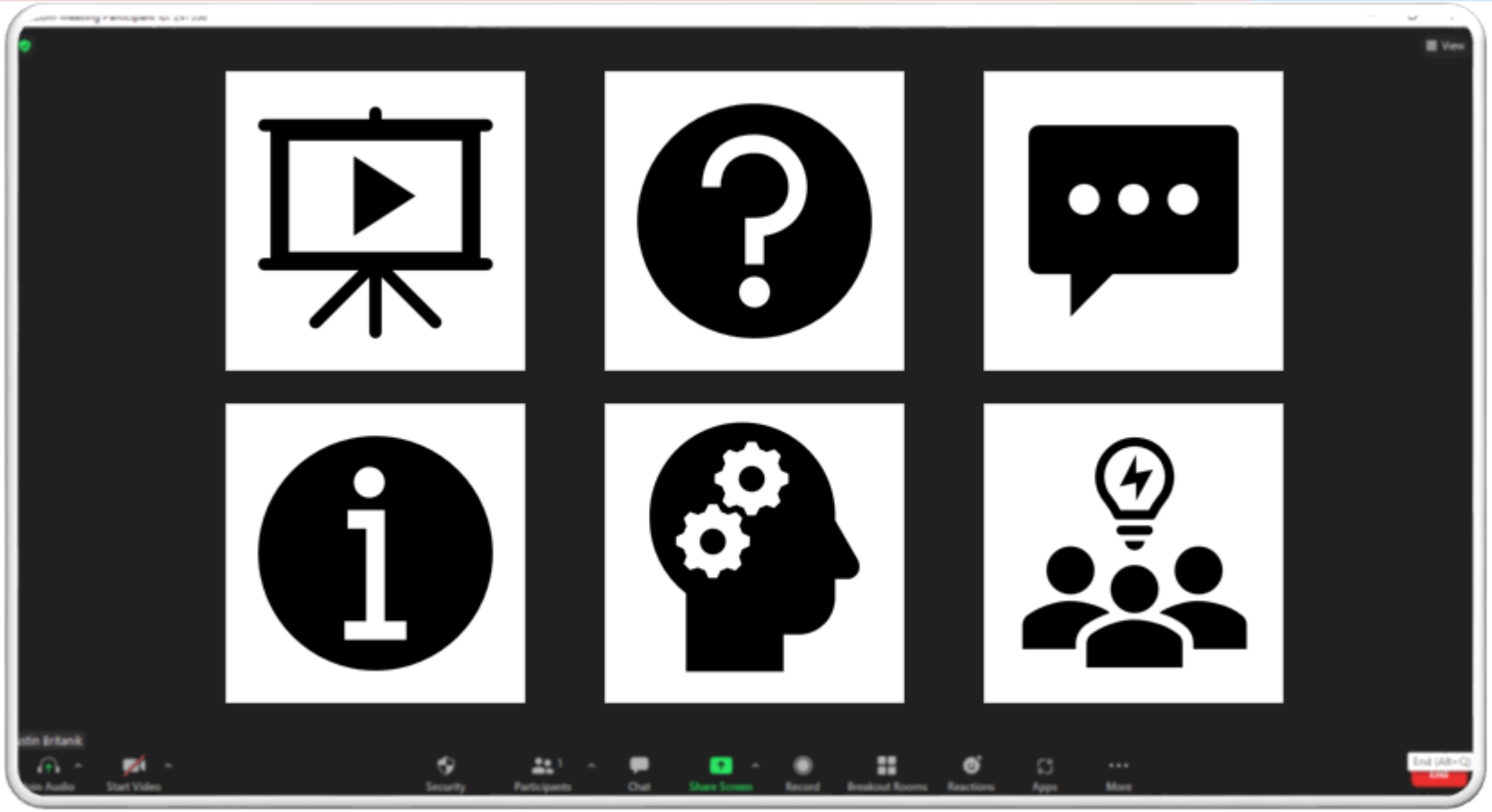
- Instead of another meeting consider using tools that allow for collaboration when people have a few spare minutes such as:
  - Moving QI tool templates to a centralized place where teams and family partners can edit use comments to address questions and provide feedback.
  - Use email voting or polling make decisions without a meeting
  - Record meetings (and watch them at an increased speed)



Alternatives to Another Meeting



Video Presentation

- Most benefits of a video conference, but can be accessed on demand
  - Loss of real-time interactivity does lead to increased need for coordination and follow-up afterwards
- Works well when the transfer of information is one way such as updates and didactics
- Perfect for situations where the information will need to be repeated
- Great for training modules

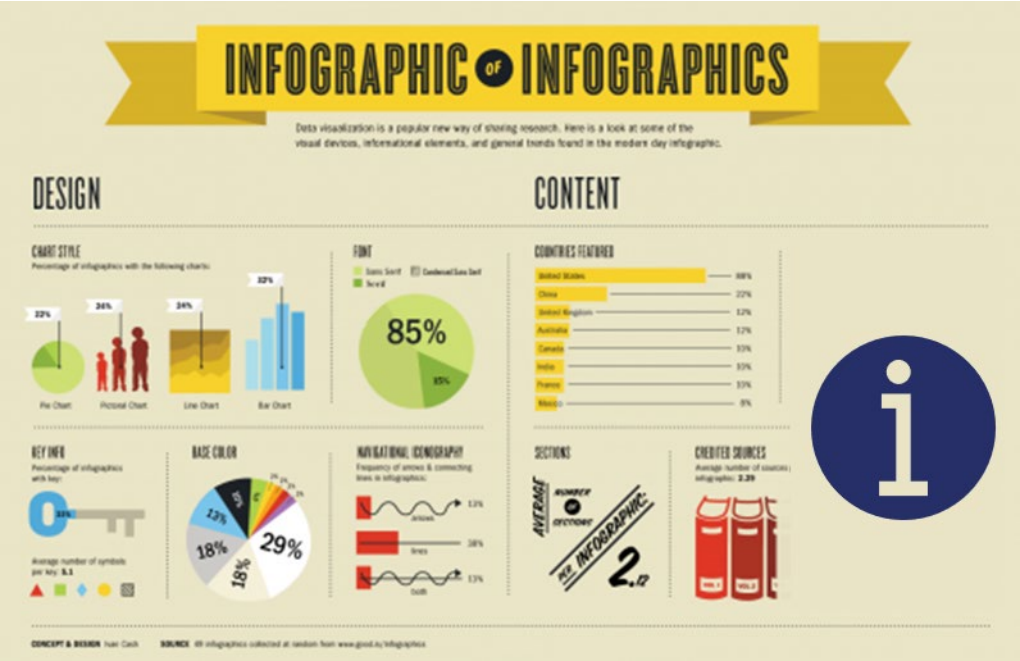
FAQ sheets

- Written documents that capture 80 – 96% of questions needs etc.
  - In addition to, not replacing human contact
- They improve meetings by addressing the needs of new stakeholders

Instant Messaging

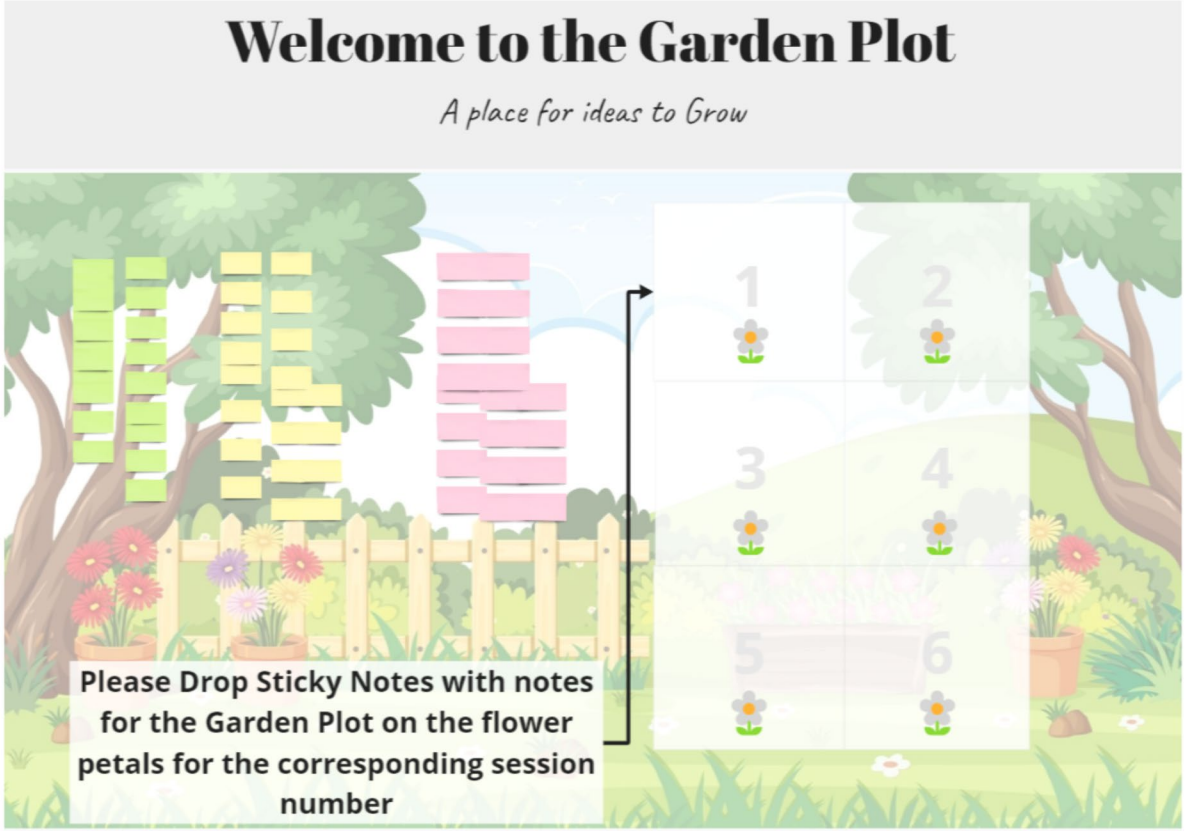
- Most benefits of real-time communication without the legwork of a meeting.
- Get answers to burning questions and a transcript of discussion.
- Informal and targeted discussion

Infographic



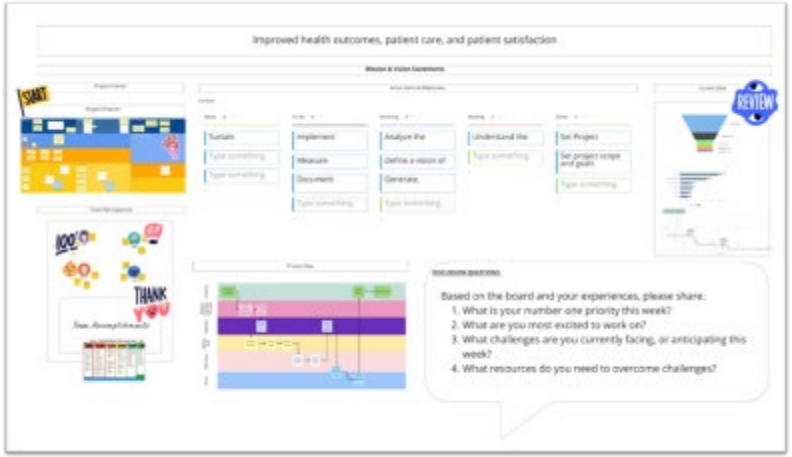
- Highlights services, data, and experiences– without much text. Images and icons are used to tell the story.
- Great for recapping accomplishments or distilling down data into digestible takeaways

Brainstorming Board



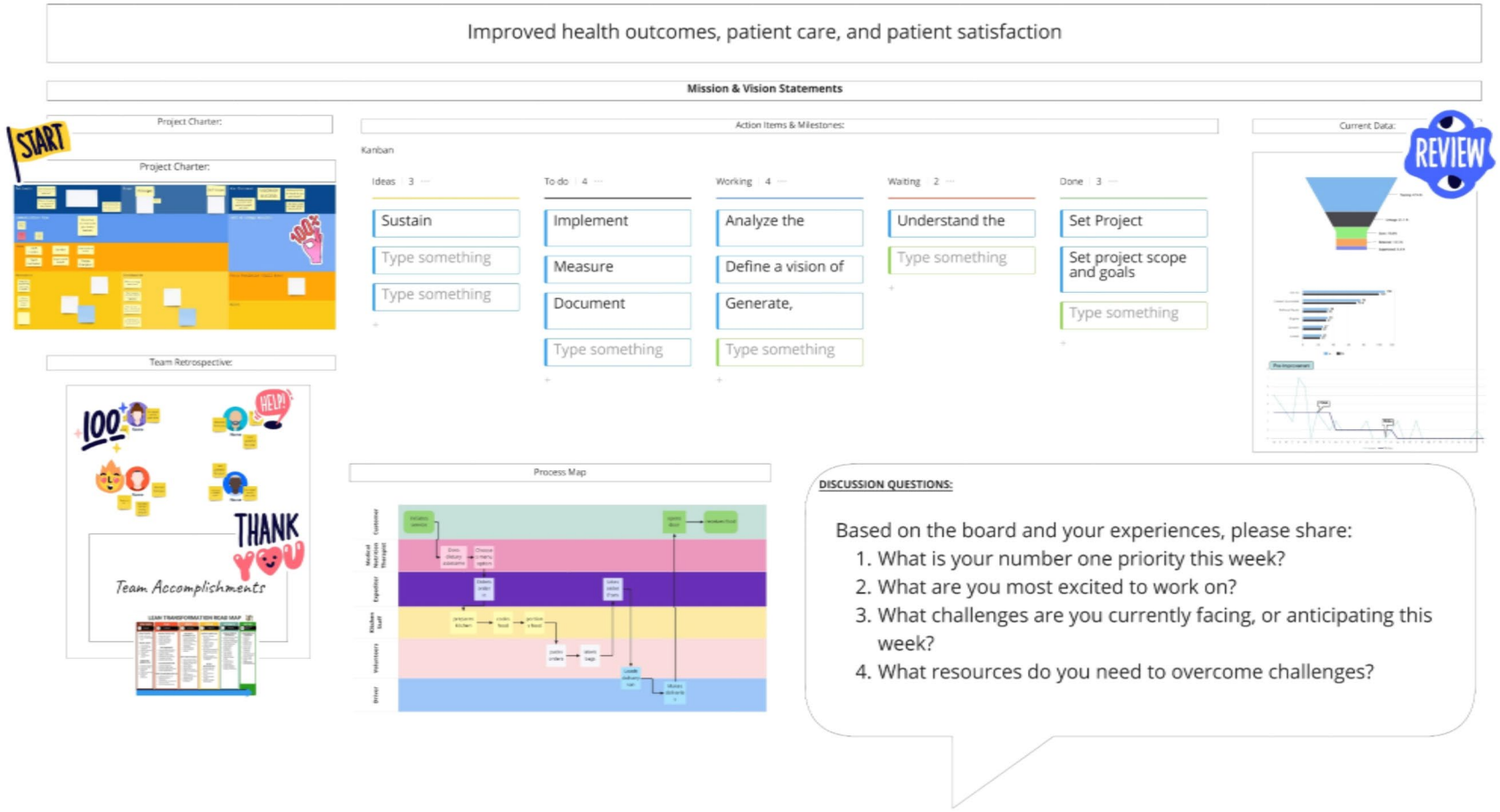
- Place for adding ideas that occur outside of meetings
  - This is a space to cultivate ideas
  - Ex – keeping a running list of agenda topics, needs, challenges, celebrations, ideas etc.
- Can be done virtually with a whiteboard application or document on a shared drive

Team Huddle Boards



- Visual management of flow through systems
  - To Do
    - Doing
      - Done
- Project management of deliverables
- Brief: focus on biggest goal or concern for the day
- Can be used both synchronously and asynchronously
  - Can facilitate status updates in real time instead of meetings going through spreadsheets

Team Huddle Boards Example



There needs to a meeting, now what?

Setting a virtual agenda

Purpose | Start with "why"

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A GREAT OBJECTIVE

- Specific, Measurable, Action Oriented, Realistic, Time-bound
- indicates when outcome will be reached
- Reminds participants of importance of meeting
- Aligned with well-crafted agenda
- **Example:** to develop five new tactics for communicating across teams virtually to implement by next meeting.

A GREAT AGENDA

- Describes a path to achieving the meeting's stated objectives
- Answers the question: what will be covered by who and when?
- Is flexible – a quick 20 minute 1:1 meeting may only require two bullet points

Objective + Agenda = Objenda

Song, M., Halsey, V., & Burress, T. (2009). *Hamster revolution for meetings: How to meet less and get more done*. Bennett-Koehler Publishers, Inc.

Objenda

1. Know the material.
2. Ensure the order flows properly.
3. Time each section.
4. Ensure every bullet point has a purpose, and each purpose is met.
5. Use technology and interactivity to achieve the objectives, not obscure them.

Virtual Activities to Accomplish Objectives

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1. Establish the meeting flow
2. Break the ice
3. State the objective
4. Get a pulse
5. Prioritize
6. Collaborate
7. Determine Next Steps
8. Celebrate

This is a menu – not a checklist.

Generally these are in order, but things can certainly move around to meet the objectives, or mesh with team dynamics

Practical Tips

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- **Assign meeting roles**
  - Recorder
  - Timekeeper
  - Technology/ chat monitor
  - Facilitator
- **Remember size and scope**
  - Tailor the sophistication and preparation to the needs of the audience
  - Smaller meetings with regular participants may have their own norms; despite less structure
  - ***Don't overengineer it!***

Icebreaker | Emoji Continuum

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How are you feeling about this presentation so far? Put an emoji in the chat!

Icebreakers & Exercises

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- Setting the tone with interactive activities is a great way to increase the energy – especially in virtual meetings.
- Give full instructions; ensure full understanding before participants start.
- Select an icebreaker that:
  - Fits within your time;
  - Works with the number of people you have;
  - Lays a foundation for upcoming topic; and
  - Is FUN!

Round Robin Report Out

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What's going well? 🎉
What are you proud of, excited about, energized by?

- Internal Meeting weekly
- Case Presentation
- QI Didactics

What's not going well? ⛔
What are you disappointed in, frustrated about, and drained by?

- Data Challenges SNAFUs, CW Helpdesk
- Temporary coverage for Grants Admin staff
- Recruiting people with lived experience for co-design event

Resources Needed? 📈
What do you need to overcome challenges and address next steps?

- Help with data collection
- Lived experience liaisons
- Help with control chart analysis
- Co-Design Training
- Resources on sentiment analysis

What are you focused on? 🤩
Where are you spending most of your energy?

- Slides for next month's presentation
- Performance Measures
- Fixing logic in Surveys
- Recruiting people with HIV

What are our next steps? 💪
What are we going to do now, how do we get to a shared win?

- Prioritizing QI Projects Didactic Topic for CQM Meeting
- HREP so many people - how can be utilize them most effectively?

What else? 🕶
Is there anything else you wanted to discuss or share?

We need to update our workplan to reflect this months changes

Taking a Pulse | Report out

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- **Thoughts and Feelings**
  - Use emojis and sticky notes
- **Current Status**
  - Is the team on target to meet the projected deadline?
  - Have any changes impacted the design of tests?
- **Challenges**
  - Any barriers encountered this month?
- **Resources**
  - Requests or needs to facilitate resolution of challenges?
- **Timing**
  - This can be done async ahead of time and then reported out during the meeting

Brainstorming | Breakouts & Sticky Notes

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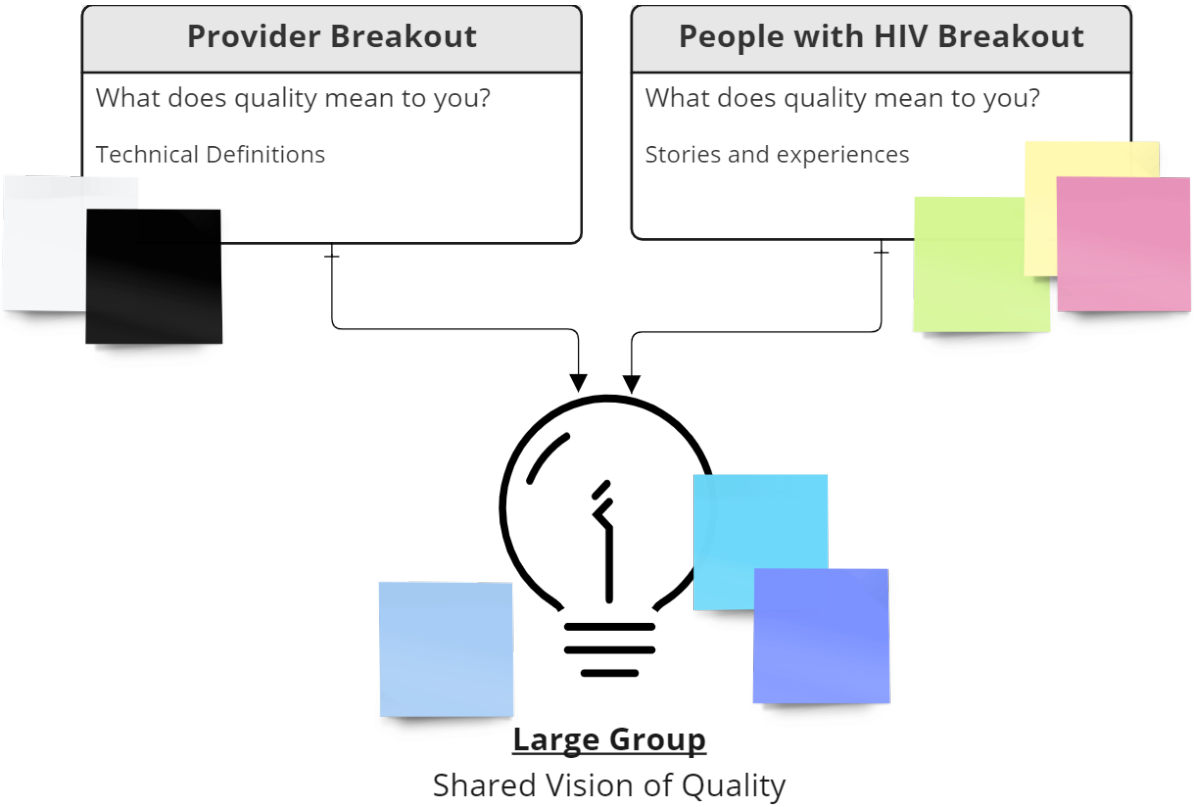
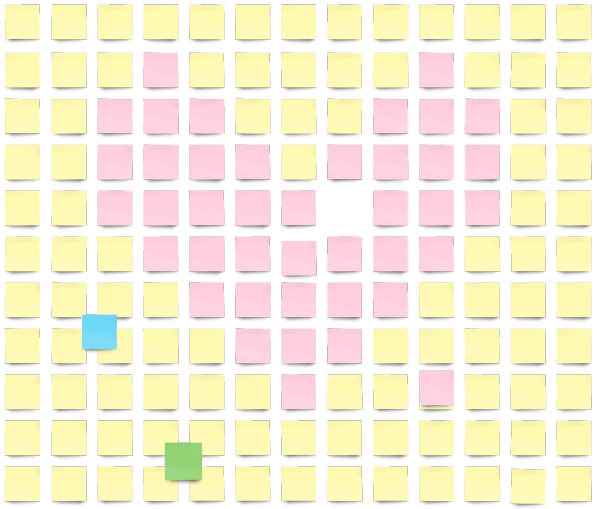
Example: Breaking out providers and people with lived experience receiving services.





Brainstorming

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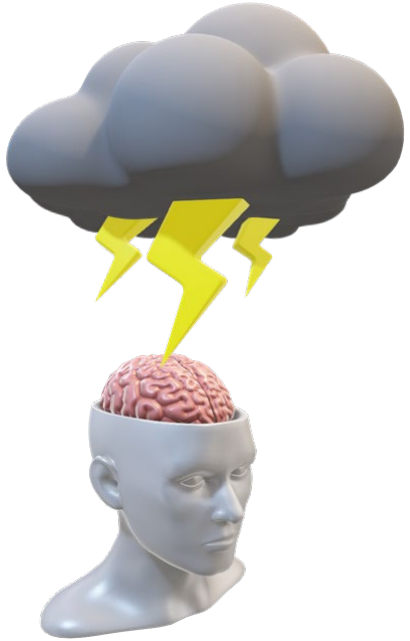
- A group problem solving technique that involves the spontaneous contribution of ideas from group members
  - **STRENGTHS**:
    - Velocity and volume of ideas generation is high
    - No wrong answers
    - Can spark creativity
    - Unlocks the wisdom of crowds
    - Flexible with a number of templates and situations
  - **WEAKNESSES:**
    - Accuracy of assumptions will need to be verified
    - May result in ideas that aren't actionable, and only crowd the field
    - Speed precludes a data driven, or even sometimes data informed process



Virtual Prioritization

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- **Steps**
  - Affinitize
  - Summarize
  - Analyze
  - Synthesize
- **Purpose**
  - Group together like concepts and ideas to distill down criteria
  - Define what is valuable
  - Establish what is feasible
  - Gain a shared vision of a path forward

Prioritization & Decision Techniques

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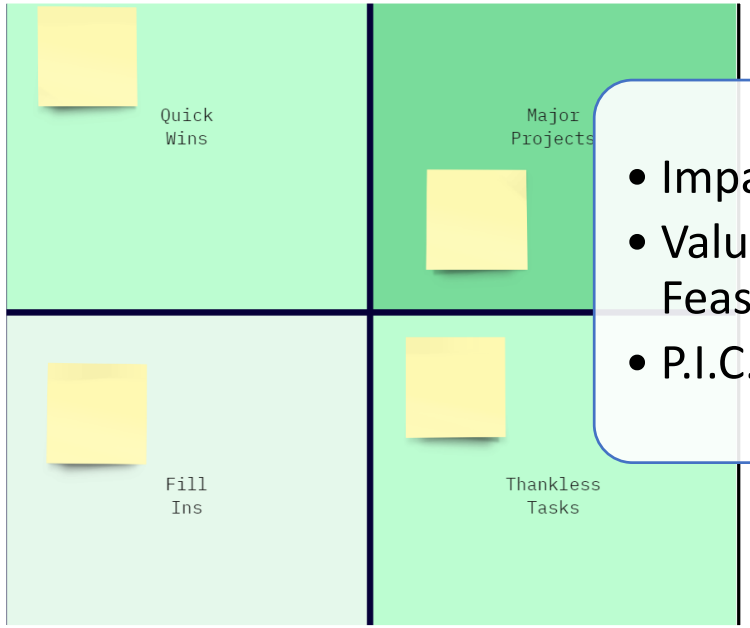
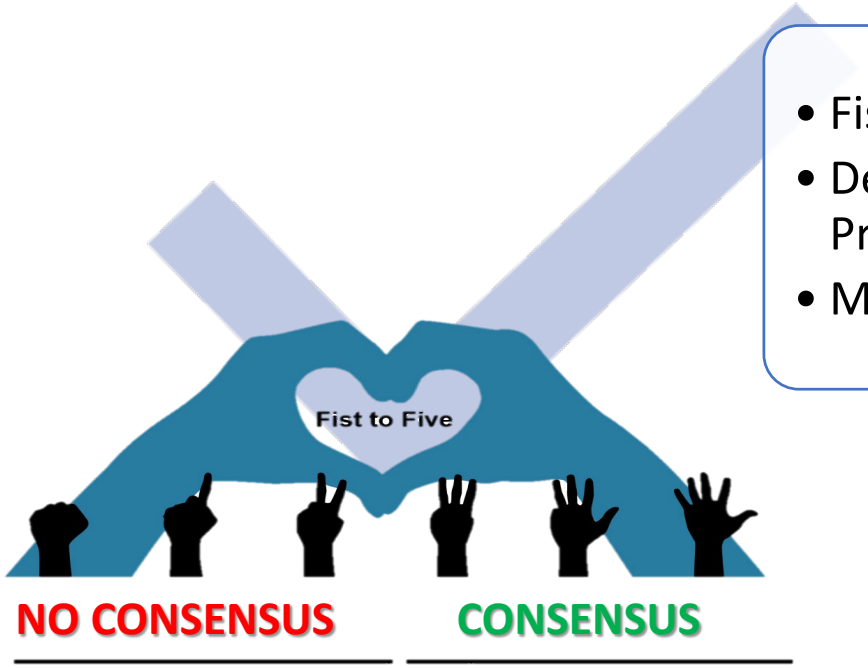
Matrices



- Impact vs. Effort
- Value vs. Feasibility
- P.I.C.K

Decision Making



- Fist-to-Five
- Delphi Process
- Multi-voting

Multi-vote Example

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Round 2:

- Optimal Linkage & Referral System for the network
- Adapt and Spread an intervention: Resources for Job Search
- Standardized Case Conferencing Tool
- Network-wide protocol for Text based adherence program
- Network-wide use of Youth Peer Navigators
- HIV and Aging Project
- Black MSM
- Black Trans Women
- Intersectional stigma project

Round 1:

- Continue with Youth/Adolescent/ Young Adult Focus
- Something entirely different

Data:

Viral Suppression (HAB) Overall Performance Average: 89.1%				
	Black Transgender	Older Adults (>50)	Black MSM	Youth & Young Adults(<24)
Population Sample	92	875	759	166
Pop Performance	76.09%	90.51%	88.14%	72.29%
Absolute Disparity	YES DISPARITY	NO DISPARITY	NO DISPARITY	YES DISPARITY
Relative Risk	UNDEFINED RESULT	UNDEFINED RESULT	UNDEFINED RESULT	UNDEFINED RESULT
Comparative Disparity	UNDEFINED RESULT	UNDEFINED RESULT	UNDEFINED RESULT	UNDEFINED RESULT
Odds Ratio	YES DISPARITY	NO DISPARITY	NO DISPARITY	YES DISPARITY
Absolute Impact	12	17	10	29

Multi-Voting in Stages

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Round 2:

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vote 1

Round 1:

- Continue with Youth/Adolescent/ Young Adult Focus — ~~19~~ +
- Something entirely different — − 11 +

Top 3 results

Optimal Linkage & Referral System for the network	9 votes
Network-wide use of Youth Peer Navigators	8 votes
Standardized Case Conferencing Tool	5 votes

Multi-Voting

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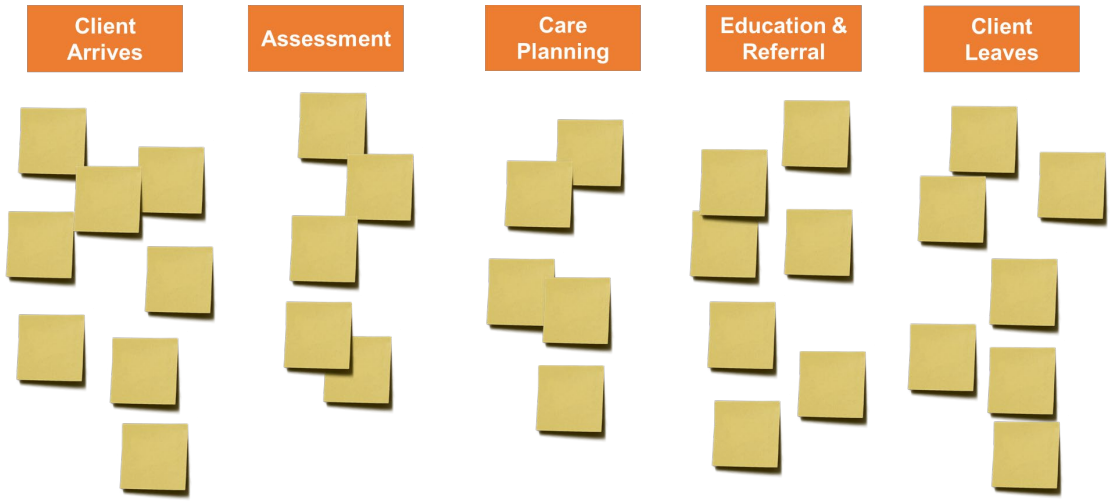
What	Why	When	How
• A way for a group to quickly narrow a list down to a few options for deeper analysis or final decision. It uses preference by majority to establish consensus • Each person gets the same number of votes they can apply as they wish.	• Enables quick decisions • Eliminate options that there isn't strong affinity for • Consensus through a democratic process • Everyone has an equal stake in the decision	• You have a long list of options you need to narrow down for more focused discussion or analysis. • There is a need to prioritize multiple options based on popularity • The decision needs to be both made quickly and accepted by a group	1. Determine who should be at the table 2. Bring your team together virtually. 3. Determine parameters – e.g. top 3 ideas go forward etc. 4. Create or share the existing list of options. 5. Briefly recap each option. 6. Allocate the same number of votes to each participant. This can be done manually, with 'dot' stickers, or using collaboration platforms 7. Vote!

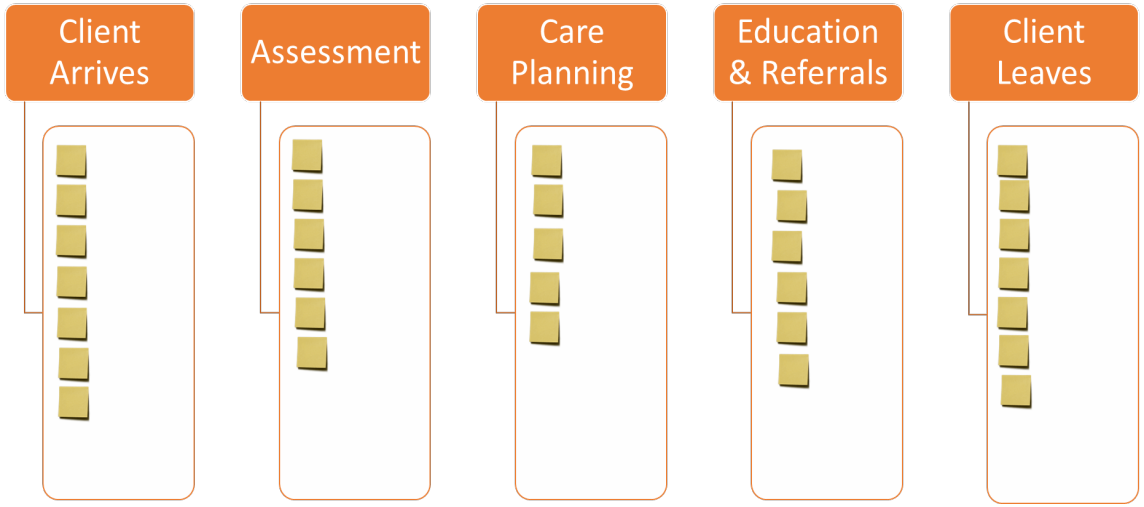
Collaboration |Virtual QI Tools

Flow Chart

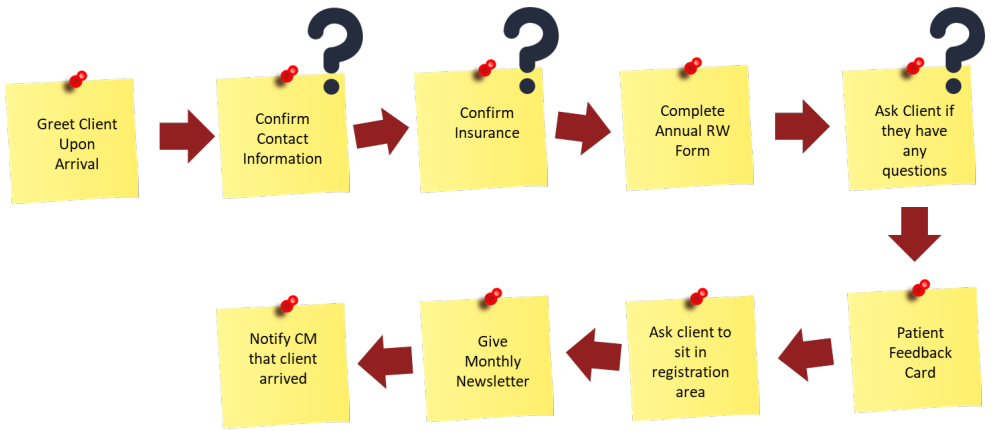
Root Cause Analysis

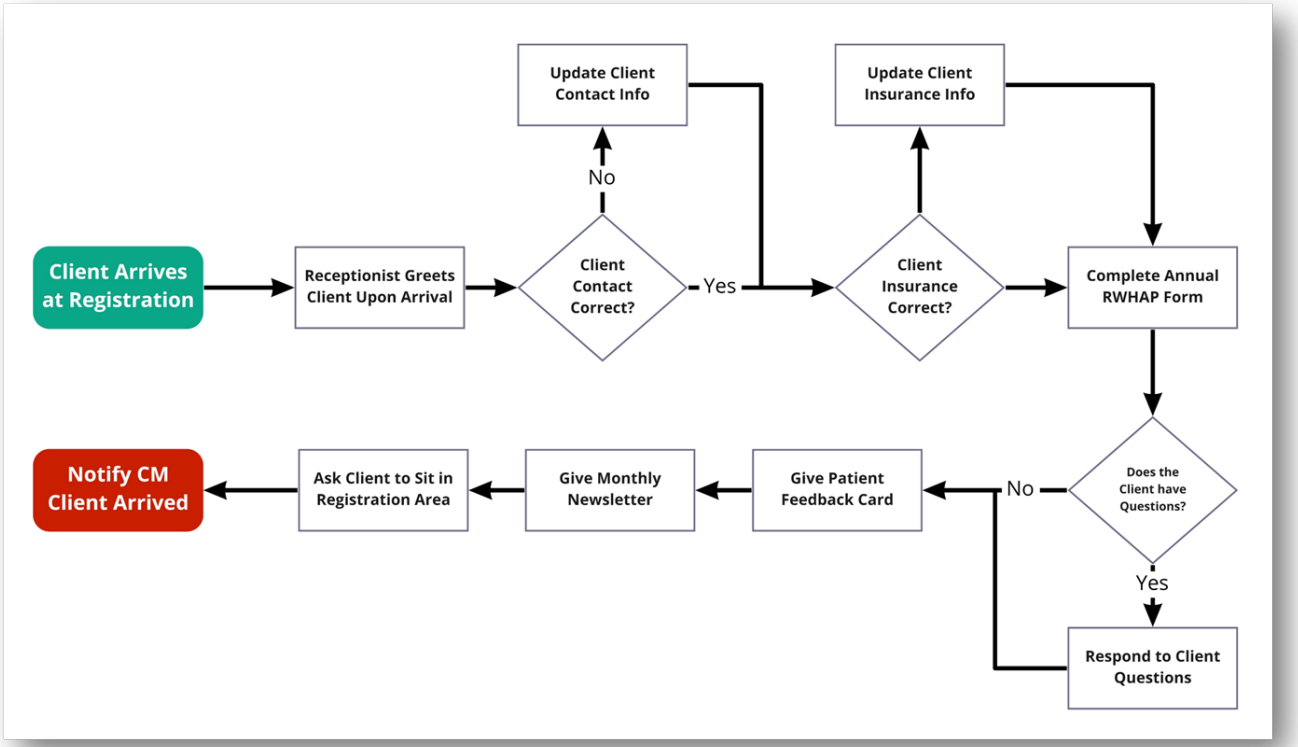
Flowchart Iteration | A Journey of Visual Evolution





Flowchart Iteration | A Journey of Visual Evolution





Generating Flowcharts Virtually

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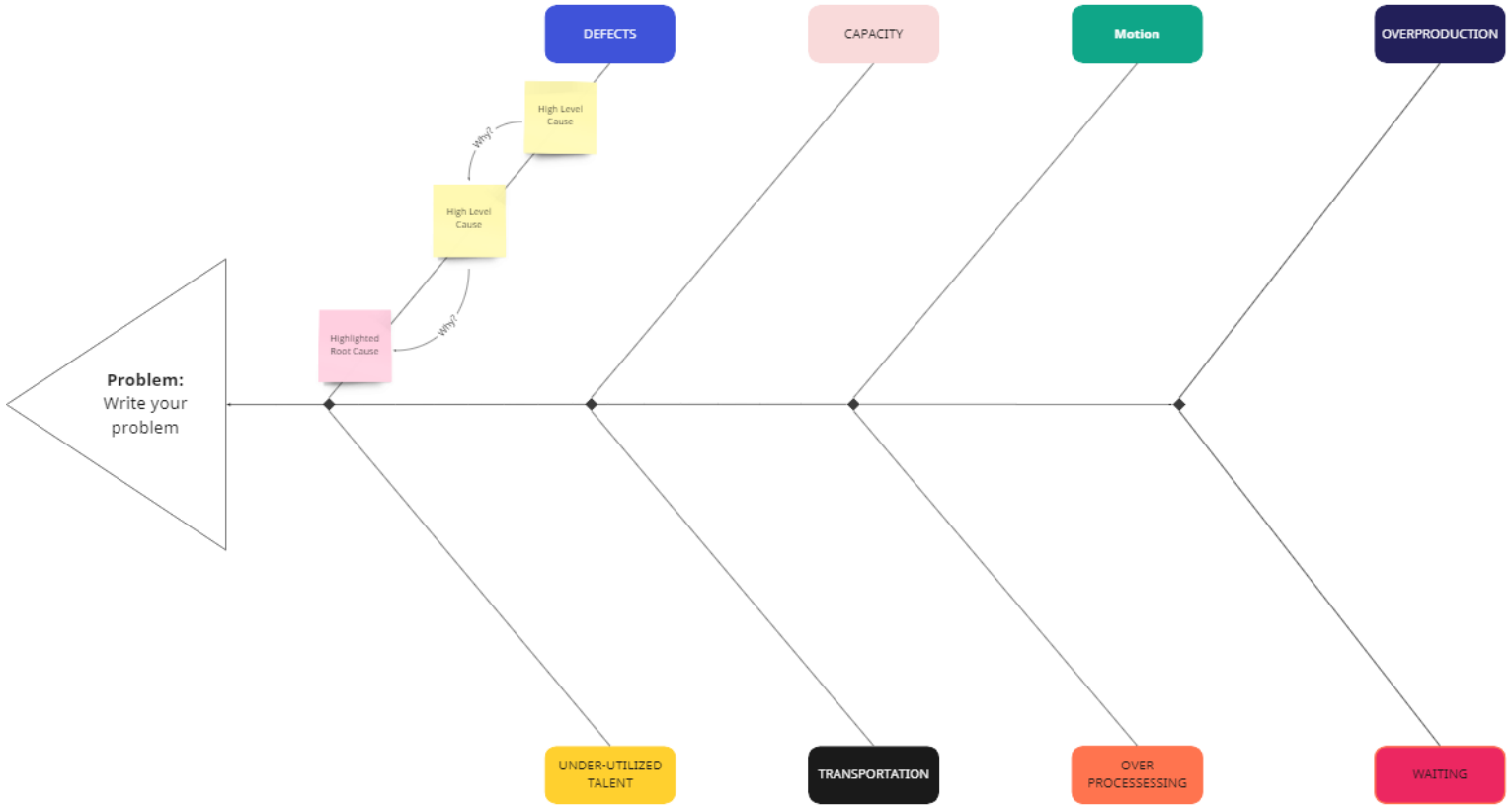
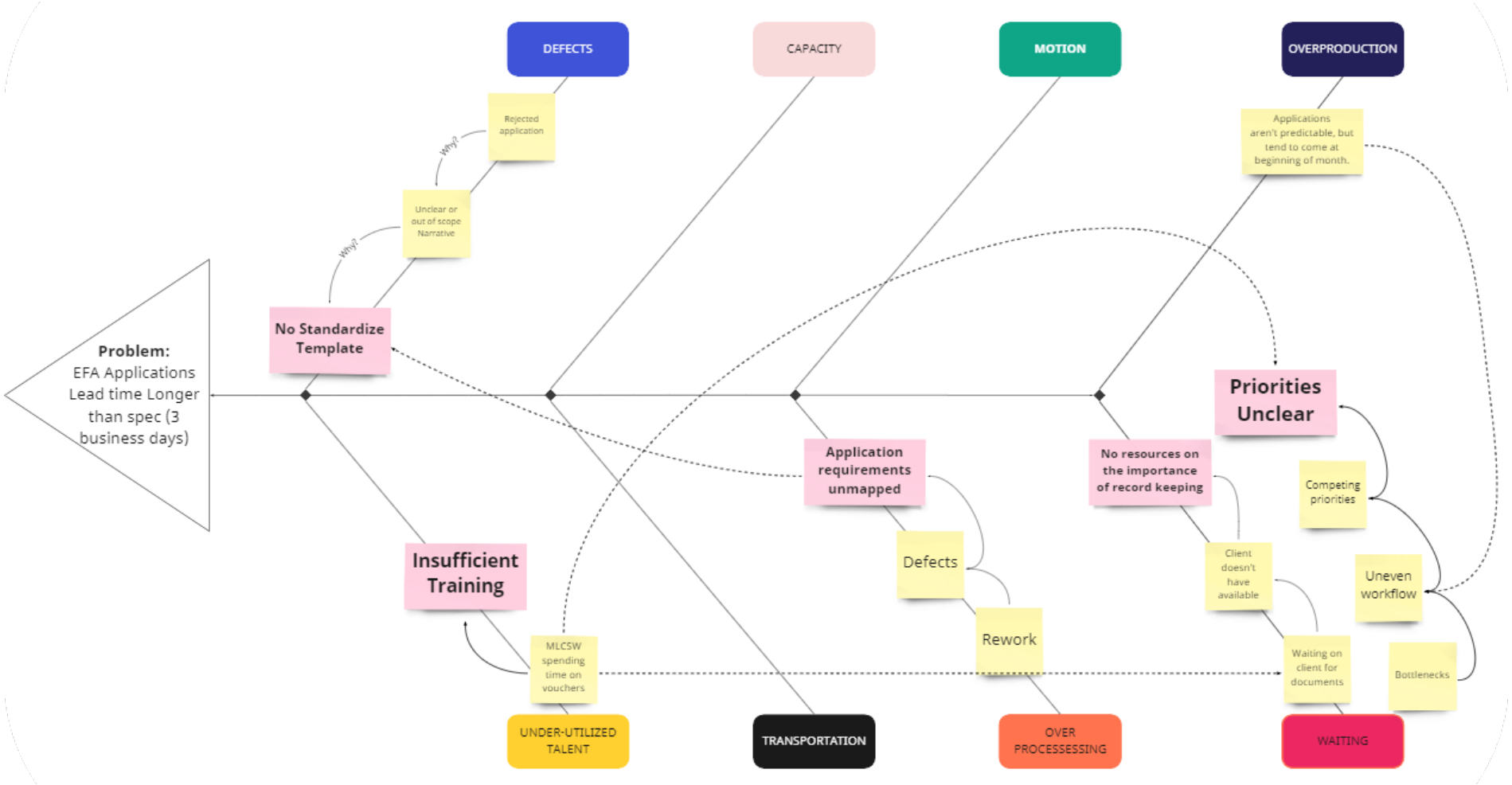
- Before beginning the virtual process mapping exercise, the facilitator should remind participants of the purpose of the process mapping exercise and the steps in the activity
- The purpose of process mapping is to create a shared mental model of the process as it is currently being implemented – NOT as we wish it were implemented
- All person's opinions on the process are critical and should be respected – consideration should be given to psychological safety and power dynamics during the exercise
- If individuals do not share when the process diverges from their perspective, the process mapping activity will miss critical information that might be creating variations leading to poor outcomes
- Clarify that the role of the facilitator is to question and clarify; in other words, interrogate the process (which can feel like interrogating people)

Fishbone Diagram Blank Template



Complete Fishbone



Virtual Root Cause Analysis

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- Have data handy, preferably in the same workspace or whiteboard
- Assign someone to record the tool, and another "scope defender", who keeps the team on track and prevents the exercise to devolving into an unstructured list.
- Mix and Match Category headers based on the problem at hand, try:
  - **Lean wastes:** 8 wastes, overburden, unevenness
  - **Critical factors:** e.g. - knowledge, communication, cultural safety, reliability, timeliness, understanding of patient needs
- Discuss each root cause and look for overlap and connections

Celebrating and Teambuilding Virtually!

Retrospective

Virtual/Hybrid Teambuilding Ideas

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- **Organize a virtual team lunch** – gift codes for food delivery apps or coffee
- **Team agreements board** – Guiding principles around teamwork, feedback, communication, needs, want, and vision of an environment that promotes excellence
- **QI Superstars** -- Team-member profiles, and a rotating featured team member with a list of accomplishments and expressions of gratitude from peers.
- **Fun Ideas**:
  - Virtual Scavenger Hunts
  - Virtual QI Project Trivia
  - Personality and Skills assessments
  - QI focused journal club
  - Morning Meditation
    - Mindfulness activities + multi-disciplinary QI huddle

Parting Tips

Ideas for virtual facilitation

Virtual Meetings | Best Practices

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- **Start on Time**
  - Encourage everyone to get on 5 minutes before the scheduled start to work out A/V issues.
- **Cameras on as much as possible**
  - Allows participants to read each other's reactions and moods, it also encourages them to pay attention and resist multitasking. Respect participants, and trust they know when they need a camera break.
- **Take short, frequent breaks**
  - Cameras on in back-to-back meetings can be draining, set your agenda for slightly less than the booked time and give your participants a gift of time to recharge and reset.
- **Use visuals to your advantage**
  - To get folks talking an engaged right off the bat
- **Use mute judiciously**
  - **PROS:** It kills engagement getting distracted by background noise and talking over each other
  - **CONS:** It kills the mood, creates awkward silences, and discourages spontaneous discussion
- **Use available features such as chat, polls, whiteboards**
  - Some participants are more comfortable giving opinions in these methods instead of talking

Lessons Learned

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- Technology can make a meeting, but it is always a wildcard
  - Ex: Identify someone else to serve as facilitator in the event you have connectivity problems
- Monitoring feedback is harder virtually, use a co-facilitator to monitor chat, reactions and raised hands, background noise etc.
- Be deliberate in developing relationships. Take time for icebreakers intros, and support with some in-person if possible.
- Make virtual engagement the norm, expect contributions and promote engagement from everyone.
- Don’t let perfect be the enemy of good
- **Mistakes will happen – *learn from them and move on!***

…one more example

Brainstorming Chatter-fall

Question: Which concept or tool are you most excited to try?

Drop the response into the chat room *but don't post just yet*

- On the count of "3" everyone will post at the same time