



HRSA Ryan White HIV/AIDS Program

**CENTER FOR QUALITY
IMPROVEMENT & INNOVATION**

Engaging Leaders in CQM and QI

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of Health**



HRSA Ryan White HIV/AIDS Program

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Learning Objectives: You Will Learn About...

1

How leadership was engaged in CQM, QI, and lean methodology in a Part A / Part B RWHAP

2

Your role as a champion regarding leadership engagement

3

Technical and personal approaches to engage leaders in CQM

4

Tips for specific types of leaders and situations

5

An activity you try to craft a tailored message to **YOUR** leader(s)

Before We Dive in...

OPPORTUNITY |

- Is there anyone who wants to engage a leader with a tailored message by next Tuesday?



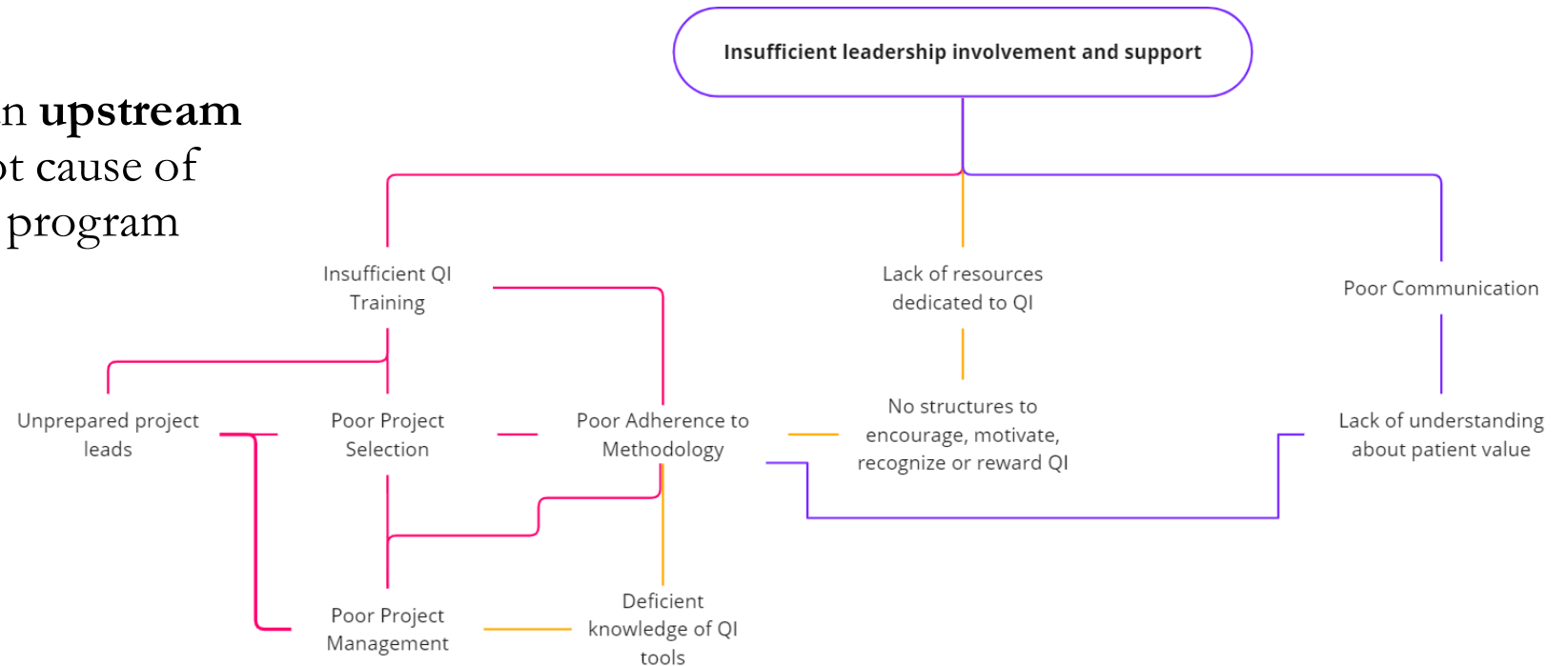
HOW IMPORTANT IS LEADERSHIP BUY-IN?

Let us know in the poll!



The Need for Leadership Engagement

- The top critical failure factor inhibiting sustainable continuous quality improvement efforts is deficiency in organizational top management involvement and support.
- Involving leadership in QI is an **upstream** solution that addresses the root cause of common reasons projects and program fail.



Engaged Leaders Are Critical To A Culture Of Quality


- **Selling quality to leadership:**

1. Quality solves problems and banishes waste, which helps both motivation and the bottom-line
2. Promotes experimentation and problem solving instead of tactical busy work
3. Delivers maximum value to clients and staff
4. Staff feels more engaged and works more effectively and creatively
5. Stops problems before they happen
6. Improve the quality of life at work for everyone

AN EXAMPLE

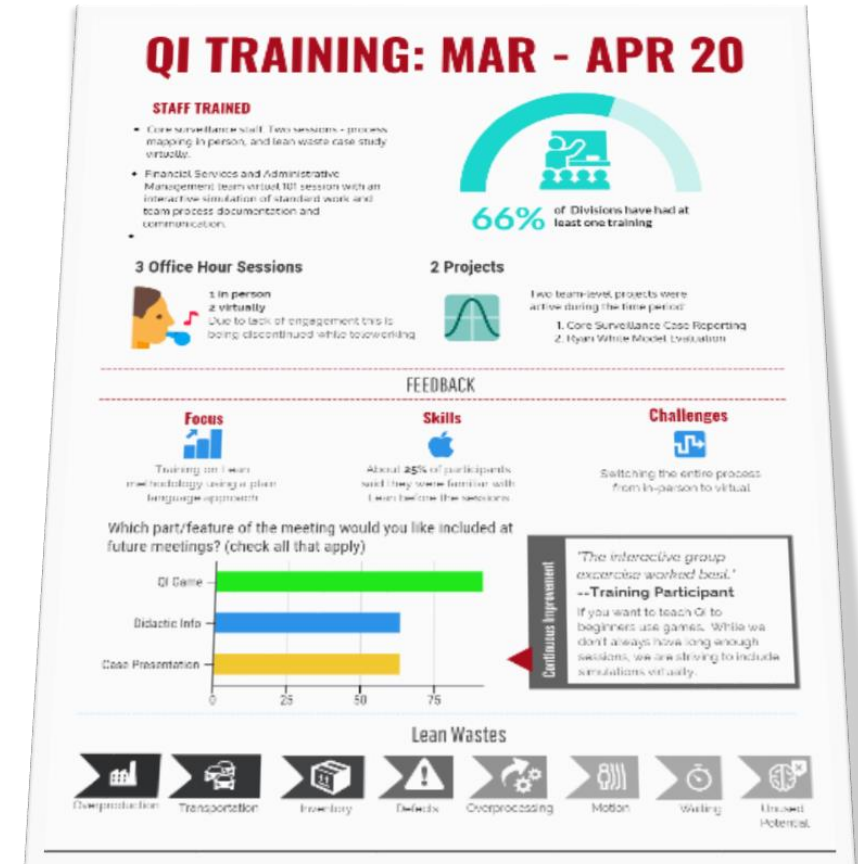
**HOW DID TWO RWHAP CQM STAFF
ENGAGE LEADERSHIP TO MAKE CQM A
ORGANIZATIONAL-WIDE PRIORITY?**

How We Engaged Leadership

- 
- Appealed to “What’s in it for me?”
 - Showed that we could address their major pain points, and challenges related to their own performance goals.
 - Showed how quality worked in other health departments
 - Provided case studies
 - Regularly communicated
 - Formal and informal meetings
 - Provided a roadmap
 - Outlined toll-gates and milestones
 - Used data to lead the conversation
 - Digestible infographics
 - Demonstrated our previous accomplishments on a smaller scale
 - Regional HIV Quality Collaborative

We Spoke Our Leaders Language | KPIs

- Goals shouldn't be set with a fear of failure
 - Develop SMART goals that produce feedback we can learn from.
- Goals should be based on data, we considered:
 - Current performance;
 - Variance from quarter to quarter, or year to year;
 - New program opportunities and threats that can affect outcomes.
- Researching what other states and territories have done, and their data/case studies.
- Reporting on our progress of outcomes, infrastructure, experience.



Started Small with A Clear Plan

Stakeholders	Inputs	Process	Outputs	Customers
<ul style="list-style-type: none"> • Leadership • Technical Advisors • Division Chiefs 	<ul style="list-style-type: none"> • Training Content • TA time • Evaluation Surveys • Dedicated space for training • A/V equipment • Buy-in • Outside Consultant to support LSS certification 	<ol style="list-style-type: none"> 1. List of staff with TAs 2. TAs invite new staff to training following all-staff 3. New staff is trained 4. TAs reach out to Managers 5. Managers choose the level of involvement they need 6. Current staff are engaged in division meetings and office hours 7. Training is reinforced with materials staff/improvement teams can review 	<ul style="list-style-type: none"> • Trained staff • Active projects • Library of QM content • Certified LSS Green Belts 	<ul style="list-style-type: none"> • New Staff • Existing Staff • Managers & Leadership

Training and Informing Leaders

- 1/2 day training for three senior leaders
 - Utilized outside consultant (LSS Master Black Belt) to provide training and technical assistance
- Focused on methodology and strategic alignment
 - Clarifying roles around QI for leaders



Made Quality the Solution for Every Problem

- 1. Problem:** Need to plan the big staff Halloween Event
 - **Solution:** Quality Focused Halloween Session
- 2. Problem:** Improving Employee Engagement Survey Score.
 - **Solution:** Engage staff from every division to participate in QI projects aimed at the biggest opportunities from the survey.
- 3. Problem:** Challenges with program redesign.
 - **Solution:** Use QI tools and methodology to design.
- 4. Problem:** Missed EHE goals
 - **Solution:** Break it down to several manageable QI projects.

QI Halloween 2019

Harnessing an opportunity to engage staff across the Administration during a holiday event, Quality Improvement capacity and interest was built through a series of quality games designed to teach quality principles.

- 60 staff**
Ranging from leadership (CMO and Senior Deputy Director) to general staff attended the event!
- 90 minutes**
of QI games teaching prioritizing solutions and optimizing systems.
- 40 man hours**
using established material, newly adapted for HAHSTA, two staff members spent 40 man hours developing the training.
- 59 candies**
were won in quality games
- 2 quality leaders**
Justin Britanik (QM Specialist) and Khalil Hassam (CQI Specialist) developed and delivered the training.
- Just \$30**
were spent on materials (game supplies, prizes, and snacks.)
- Zombie Survival and Win All You Can** were the two quality simulations that demonstrated principles of root cause analysis, identifying high impact solutions, optimizing systems instead of subsystems, and integrating team feedback.
- Staff shared 'aha' moments about quality improvement opportunities in their work and were generally happy with the event games and facilitation.

This project would not have been possible without the support of Lawrence Frison and Lena Lago. Big thanks to Jeffrey Coleman, Jose Delao Hernandez, Laura Whittaker, Stacie Archibald, and Terrell Powell for event support.

For more information, contact Justin Britanik and Khalil Hassam

SOUNDS GREAT...BUT HOW DO I GET STARTED?

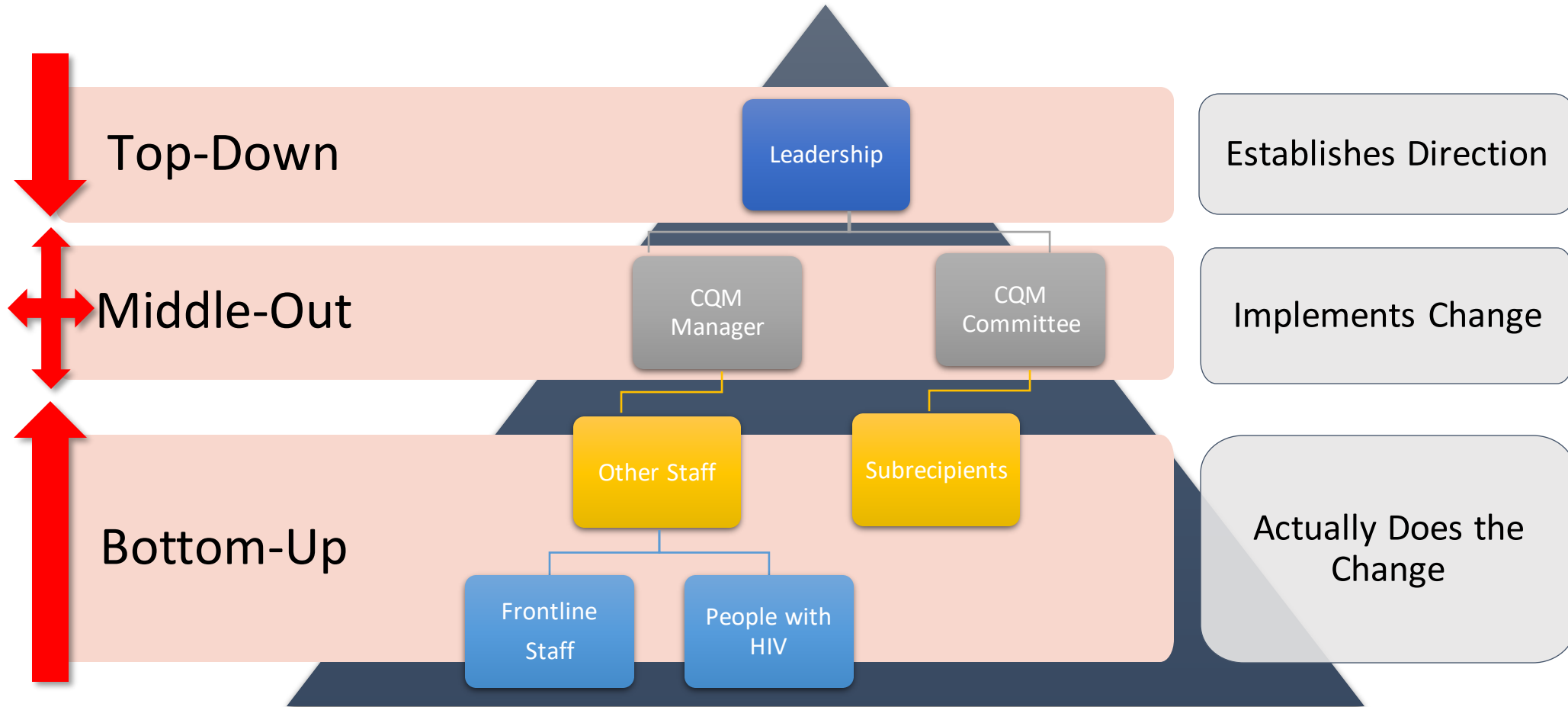
*The Most Powerful **First** Step Is Always
To **Look Inward***

YOUR ROLE AS A CHAMPION

Clarity on Roles | Champions & Leaders

- **Your Responsibilities to your colleagues and people with HIV**
 1. Manage active QI efforts
 2. Develop CQM infrastructure
 3. Gain buy-in from leaders
 4. Reports status to stakeholders
 5. Select QI teams & projects
 6. Transition ownership of completed project to staff
- **Necessary Leadership support to accomplish this**
 1. Develop a vision for CQM
 2. Set the direction, and align with agency scope and goals
 3. Nurture a culture of quality with resources and training
 4. Use sphere of influence to promote CQM program work
 5. Recognize and reward involvement in QI
 6. Remove barriers

Your Role as a QI Champion



ENGAGEMENT STRATEGIES

Engaging Leadership Concepts

- Make them aware of the **“oncoming train”**
- Provide regular tailored **communication**
- Appeal to what’s in it for them (**WiiFM**)
- Connect them to the **ground floor**
- Come ready with **solid plans** – not just problems
- Have a clear cut **ask** (and a means to document the response)
- Use your **influence** and give them full **support**

The Oncoming Train

Make the case for action!

- A CQM program without leadership support is like a car broken down on the train tracks...staff can try and push it off, or leaders can get involved and give a jumpstart.
- Make a persuasive (but not sensational) case of why things need to change. We can see a light in the tunnel and train is coming down the line.
 - *Flesh out the vision of a better place to be than stuck on the tracks. Focus more on the benefits of support, instead of the consequences of inaction.*



The Oncoming Train

1. State the emotional case for change – in a positive tone.
 2. Have a vision of a brighter, robust and/or more desirable future state.
 3. Appeal to leaders needs, while stressing their personal control over the change.
- Contextualize and define the costs associated with poor quality:
 - Staff engagement
 - Patient experience
 - Health outcomes
 - Process inefficiencies
 - Lean Wastes – duplicate information, transportation costs, excess capacity, defects, over-processing, excess motion, waiting, wasted potential
 - Overburden – burning out people and resources
 - Inequity – Variation in service process and experience

Regular Communication Topics with Leadership

What's going well? 🎉

- What are you proud of, excited about, energized by?

What's not going well? ☹️

- What are you disappointed in, frustrated about, and drained by?

Resources Needed? ☑️

- What do you need to overcome challenges and address next steps?

What are you focused on? 🧐

- Where are you spending most of your energy?

What are our next steps? 📌

- What are we going to do now, how do we get to a shared win?

Annual Goals 🎯

- How are your activities contributing to the agency annual performance goals?

Let me give you an update, focusing on key items in <:15

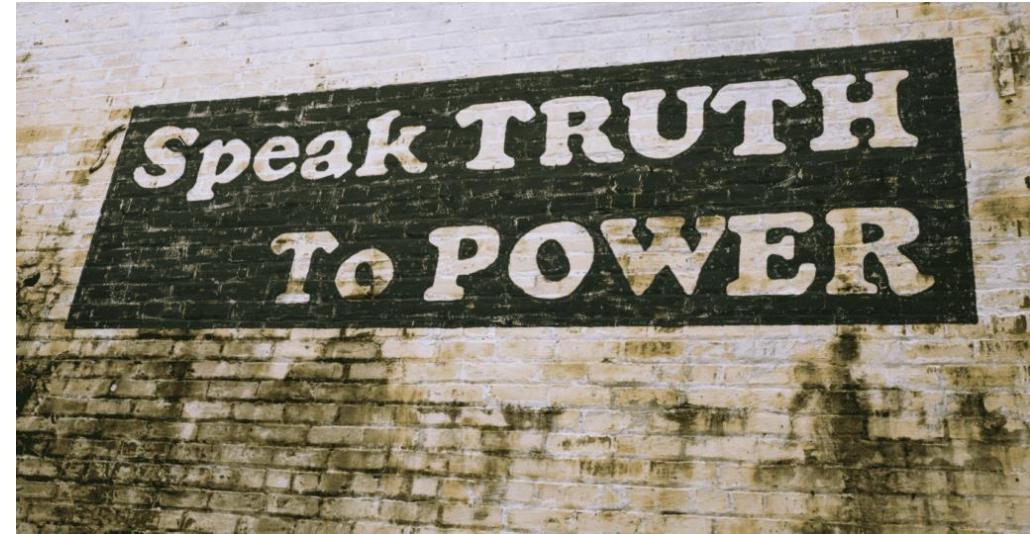


Hmm, thanks for this info. Let me consider your request – keep up the good work.



Communication

- **Speak truth to power in positive tone:**
 - E.g. “I think differently, because I’ve noticed, heard, seen data...”
 - Be consistent, not obtrusive or obstructive in messaging.
- **Manage Up:**
 - Know your leaders preferred methods of communication.
 - Email, meeting, drop-in, chat – makes a big difference
 - Don’t wait around for opportunities – make them!



Same Basic Message, but Different Approaches

Scenario A:

Look at my FMEA. How am I supposed to reduce variation in patient experience without your support for an EBCD PDSA and a data system to track PROMS/PREMS?

Patients are satisfied enough, I'm unsure what you mean exactly - but it sounds like a lot of time and money. What does CQM even really do?



Scenario B:

The board has been concerned about negative reviews, and patients lost-to-care. I have an idea to meet the KPI to resolve service recovery opportunities within 48 hours, while increasing retention. I've crunched some numbers, and I'd like to discuss a project to keep clients delighted and engaged, boost revenues, and improve our CAHPS score.

That's a relief, you're exactly what we need around here! Let's do lunch next week and talk.



Find Out What Motivates Leaders

- **Appeal to what's in it for them**

- How can CQM address their priorities and make their life easier/better.
- Speak their language, find out their measures of success and tailor your message.

- **Do your homework**

- Know your agencies strategic frameworks, key performance indicators, priorities.
- Review documents and available meeting minutes.
- Use the measures and terms that leadership cares about. Go for simplicity not technical jargon related to QI.

Organize Opportunities to Connect Leaders to the Actuals

1. Go to the **actual** workplace
2. Engage the people who do the **actual** work
3. Observe the **actual** process
4. Collect **actual** data
5. Understand what **actual** patients value



Ask Why

Show



Respect

Take leaders on a walk...to the Gemba!

Have you ever heard this from managers or leaders?

**“COME TO ME WITH SOLUTIONS,
NOT PROBLEMS”**

Presenting Plans to Leaders

- **Come to them with solid plans**
 - It should not need to be a solution per se, but it should be a proposal of how to reach a solution
- **QI Tools to use**
 - SIPOC
 - Project Charter
 - Gap Analysis

Presenting High Level Plans to Leaders

- **Project Charters**

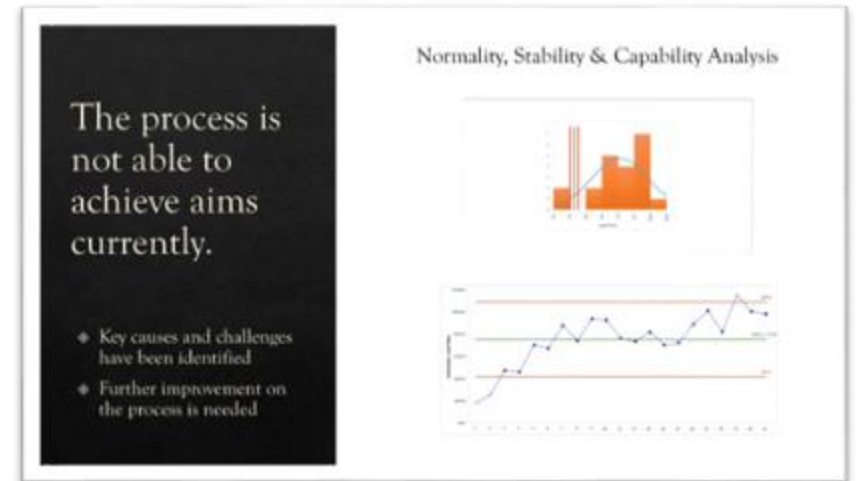
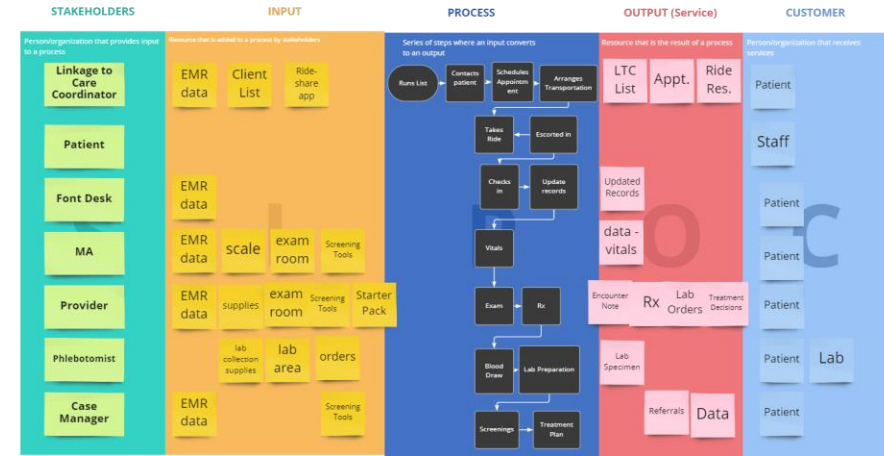
- Get leaders to sign project charters
- Outline what you need from them; including resources

- **Presentations (w/ charts & graphs)**

- Make them easy to understand with a clear narrative and direct ask
- Put key takeaways in title of slides with charts or graphs
- Rehearse, but be authentic

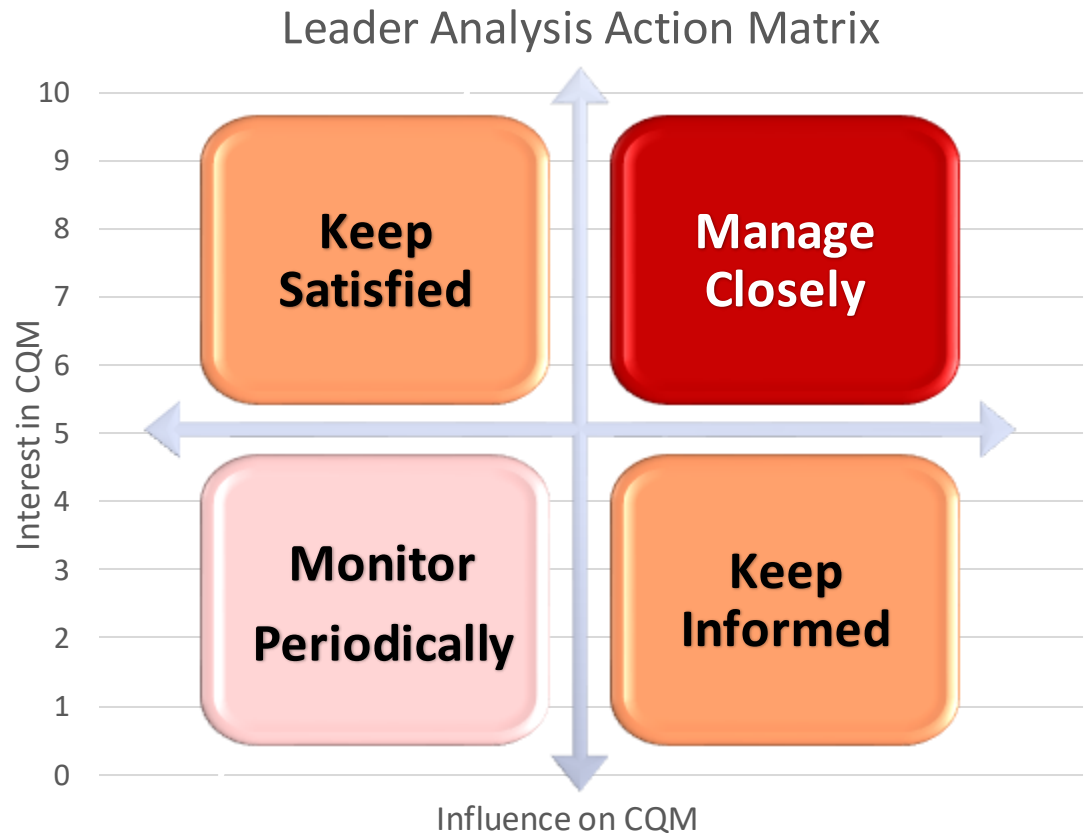
- **SIPOC**

- Give them a 40,000 foot view of QI for the agency



Plan Your Ask

- Use a stakeholder analysis template to help think through:
 - **Needs** from leaders
 - Messaging and **preferences**
 - Leadership **interest** in CQM
 - Leadership **influence** on CQM
- *This should be for your eyes only!*



Influence & Support Leaders

Appeal to:

1. **Status** – Leaders relative importance to others.
2. **Certainty** – What can leaders count on?
3. **Autonomy** – Leaders have some power and flexibility to control events.
4. **Relatedness** – How connected leaders can feel with the rank and file.
5. **Fairness** – How will engagement in CQM help everyone? Clarify rules, expectations or objectives so leaders can stress how this is the right thing to do.

TYPES OF LEADERS

Situation Specific Guidance

- Engaging new leadership
- Engaging with leadership remotely
- Insecure Leaders
- The leader who is “always right”
- A leader who seems checked out or overwhelmed
- A leader who doesn’t know the QI
- Leadership bodies or groups
- Leaders in the community

Engaging New Leadership

- Make them aware of the opportunity and achievements. Celebrate your past CQM and QI goals – share plans for the future.
- The initial goal should be to build relationships and secure an ongoing dialogue about CQM and QI. Don't make this a sales pitch. Start broadly.
- Find out their preferences. How do they process data and information
 - Visual, experiential, or auditory?
 - Data driven or data inspired?
 - Rational and reflective, or reactive and emotional?

Engaging with Leadership Remotely

- Don't wear leadership out with video conferencing meetings. Find out what their preferences are and use a mixed approach including:
 - FAQ sheets and infographics
 - Virtual Whiteboards
 - Instant messaging
 - Project Management apps
- Avoid information overload
- Be clear about follow-up steps that should be taken
- Sharing meeting agendas ahead of time
- Rotate meeting times if they are in different time zones



Insecure Leaders

- Raise the issue 1:1, rather than in front of everyone
- Use soft statements for criticism
 - E.g. – “I value you as a leader, but I've got a tough message to deliver. CQM cannot function without your involvement. I'm concerned that our goals are in jeopardy because we don't have the resources, support, and direction that staff and patients need from you...”
- Focus on technical debrief and process centered critique instead of statements of blame
- Emphasize the future positives

The Leader Who is “Always Right”

- Pitch the innovation and accomplishments that QI delivers. This is their chance to visibly be in on something big.
- Assuage their diminishment of CQM with concrete plans that show risks are mitigated and common pitfalls are addressed
- Show them – don’t tell them. Go to the Gemba with them and let them make their own judgement

A Leader That Seems Checked Out or Overwhelmed

- Offer QI as a means to address the pain points that keep them busy
- Write your performance plan to include their mentorship under professional development
- If they are too busy – ask for an audience with other leaders who can help you out



A Leader Without QI Knowledge

- **GET THEM TRAINED!!!**
 - Put in a Technical Assistance request for building leadership engagement infrastructure.
 - Get them at least a basic (≈ 4 hours of methodology and strategy) primer on QI and CQM.



Leadership Bodies or Groups

- Build credibility before trying to get buy-in
- Seek to recruit champions for QI for these groups
- Volunteer your time for things like planning councils and advisory groups
- Consider providing free training at convenient times for leaders in the community who might be less aware of QI



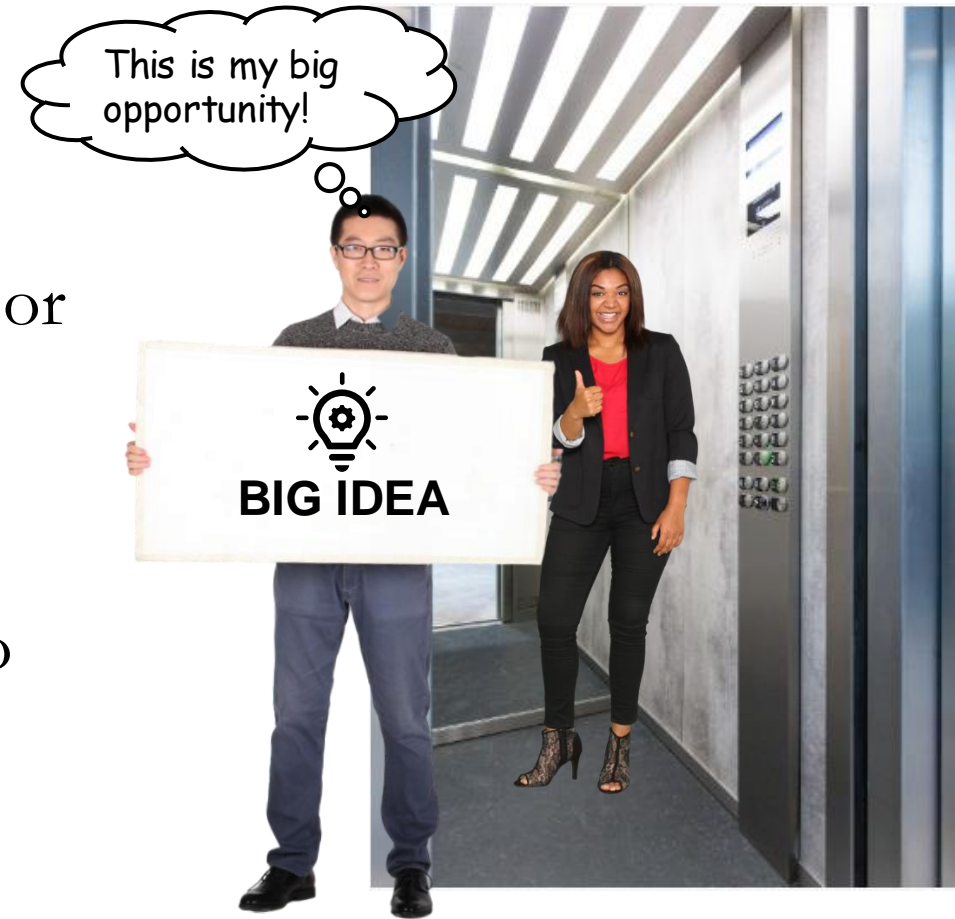
INTERACTIVE ACTIVITY



27-9-3:
**A Quality
Improvement Game!**

What Is an Elevator Pitch?

- An elevator pitch, elevator speech or elevator statement is a short summary used to quickly and simply define a process, product, service, organization, or event and its **value proposition**.
- Imagine that you meet somebody influential on an elevator ride and had between 30 seconds and two minutes to sell them on an idea.



The Activity

- Today we are going to practice what we've preached.
 - We will spend 15 minutes crafting a message to overcome objections, gain buy-in, and highlight the value leadership engagement in a specific CQM activity

27-9-3 Elevator Pitch!

- No more than **27 words**
- No more than **9 seconds**
- No more than **3 points**
- No more than **1 main idea**



27-9-3 Elevator Pitch!

27 Words – 9 seconds – 3 points

- Who is the **audience** for this particular message?
- What might appear to their **direct self-interest**?
- What do you want your audience to **think** or **understand** about your issue?
- How do you want them to **feel** about what you have said?
- What do you want your listener to **do** after they hear your message?



Adapted from: Power Prism® Developing Your Persuasive Message –
The 27-9-3 Rule, M+R New England Office, www.powerprism.org

FINAL TIPS

Summative Advice

- Start small and work up the chain of command.
- Don't do it alone – strategize with other champions with complementing skill sets.
- Plan your approach.
- Ask what can CQM do for them, not just what leaders can do for CQM.
- Patience is a virtue – Engaging leadership takes time.
- Use both technical skills and soft skills to make your case.
- Don't forget leaders are human too, with a ton of responsibility on their shoulders.



QUESTIONS



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