**Smart Start (SS)**

**Standard Operating Procedure (SOP)**

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| **Title** | **PPT** | **Work-book** | **Key Message/s** | **Presentation Tips** |
| Intro | 2-13 | Show | * WHY
* An understanding of your current state via process mapping
* A complete project outline – with aims and measures – to provide clear direction for the project!
 | * Generate excitement & anticipation
* Provide high-level logistic Overview of 2-day Smart Start Session & Collaborative
* Provide list of deliverables (PPT #12) – Show copies of each deliverable
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| Process Mapping | 14-23 | p.38-40 | Before improving any process, you must first see and understand the process | * Provide the “Why” of process mapping (PPT 14 & 15)
* Share Workbook Resource (PPT 16)
* Provide an overview of PM (PPT 17-21)
 |
|  | 19 |  | Review Logistics of Capturing Draft Process Table | * Use a wall or board in facility conference room
* Use self-stick notes
* Begin with high level steps
* Remember, this is a draft, so don’t need extensive detail; i.e., estimates on time or a range is adequate\*\*
 |
|  | 19 | p. 40 | Proceed to draft process mapping | * Classroom Activity
 |
|  | 20 | p. 40 | Review Logistics of Walking the Process | * Limited space
* Paying attention\*\*
* Completing Process Table with details obtained from front line personnel – each person to complete the table individually
* Capture OFIs (OFIs = Problems) on Self-Stick Notes
 |
|  | 20 | p.40 | Proceed to Walking the Process | * Walk the process
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| Chart Review |  |  | Evaluate Current Process Outcomes – Are patients with high viral load ultimately suppressed? | * Pull three patient records (charts) from patients that have been identified as “High Viral Load”
* Use Chart Review form to collect relevant data on VL testing - testing dates, VL results in chart (dates), follow-up counseling (dates & type), retesting (dates), etc. – Did the clinic follow the country algorithm through the viral load cascade?
 |
|  | 21 - 23 | p. 40 | Review Logistics of Updating Process Map & Table in the classroom | * Make changes – order of, name, location, person performing each step/s by moving the self-stick notes
* Capture details of each step from participants\*\* (suggest one person to complete process table for each step and others add only if they have additional or conflicting information);
* Assign scribe - one person who will be responsible for transferring the information to the electronic version before Day #2 of the SS session
* Scribe - Email Process Table to team for verification
 |
|  | 21 - 23 | p. 40 | Proceed to Update Process Map first, then update Table | * Update Process Map/Table
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| Brain-storming | 24 | p. 64 | Identify Opportunities for Improvement (OFIs) | * Using the term “OFI” places problems in a “positive” light
* All participants place identified OFIs randomly on board
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| Affinity Diagram | 24 | p. 65 | Group OFIs into affinities (or categories or themes)  | * Create a different color self-stick note with appropriate title for each group
* Count the number of OFIs under each category and write on title note
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| Impact Effort Grid | 25-26 | p. 66-67 | Prioritize improvement ideas (OFIs) based on the degree of impact and the level of effort required | * Using flipchart paper and colored tape or marker, create a 4-quadrant grid (see Workbook p. 67)
* Determine the quadrant placement of each OFI affinity group based upon the project team’s estimate of Effort (X axis) and impact (Y axis)
* Select one OFI from the “C” Quadrant for the LARC project
* Place the “A” and “B” Just Do It items on the Action Plan
* Assign a scribe to capture the OFI affinity groups and the number of votes and place in electronic format
 |
| QI Project Outline | 27 | p. 13-14 | Complete key elements in the project outline:MFI – Goal, Aim & MetricDMAIC – Define & Baseline Measure  | * This is a living, breathing document; i.e. changes can occur
* An iterative process; requiring discussion and guidance from faculty
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| Aim Statement | 28-31 | p. 8-9, p. 46 | A “Do What, by When?” statement arrived at by answering the Model for Improvement (MFI) guiding questions | * Begin with “big”, overarching goals 🡪 moving to a specific measurable, time-bound aim statement
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| Metric Selection | 28-31 | p. 49-54 | Metric key for answering the MFI “How will we know…” question | * Guide toward specific, easy to measure metrics
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| Data Collection Tool | 32 |  |  | * Probing questions to assure that all the needed elements for calculating the measure are accounted for in the data collection log
* Draft Tool on Flipchart Paper
* Assign scribe to create paper-based log
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| Data Collection Plan | 33 |  |  | * Clearly identify the specifics of Data Collection
* Make sure that data will be collected and submitted to the Data Manager in a timely manner, i.e., daily or weekly
 |
| Action Plan | 34 | p. 25 | Vital tool to assure plans are accomplished | * Be sure and assign responsibility to specific people, not just a title or role
 |
| Elevator Speech | 35 | p. 47 | A key communication tool – both for stakeholders and team members | * Determined by Team
* All team members need to be able to share the elevator speech
 |
| Commu-nication Plan | 36 | p. 26 | Keeping team members, stakeholders and project managers informed | * In general, the team cannot overcommunicate
* Includes team progress as well as challenges
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| Deliver-ables Review | 37 |  | Team on path for a successful QI Project | * Make sure team has clearly assigned roles for completing and presenting the report-out at Learning Session #1
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(\*\*Will require tight facilitation to keep this moving)