**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 |
| 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 |
| 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 |
| 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 |
| 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 |
| 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 & Metric  DMAIC – Define & Baseline Measure | * This is a living, breathing document; i.e. changes can occur * An iterative process; requiring discussion and guidance from faculty |
| 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 |
| 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 |
| 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 |
| 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 |
| 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 |

(\*\*Will require tight facilitation to keep this moving)