

Improvement Fundamentals in a day

Facilitators Guide

NHS England and NHS Improvement





Improvement Fundamentals in a Day - Facilitators Guide

Improvement Fundamentals in a Day is designed to provide all the tools and resources you need to run a local improvement workshop to learn new techniques and produce the initial plans and documents to support a new improvement project. It provides step-by-step guidance, templates and facilitator videos on each of the techniques.

All you need is good general facilitation skills and you can run a workshop that will teach a number of key improvement skills, and by the end of the day you will have produced all the documents you need to kick-start your improvement project.

You could call it an "Away day in a box".

Using the guide:

This guide accompanies the PowerPoint, videos and templates and will guide you through facilitating the day.

The day is divided into 11 separate sessions each covering a different topic.

1	Introduction		
2	Energiser		
3	Introduction to Quality Improvement		
4	Exploring the Problem – Writing Aims		
5	Create A Measurement Plan		
6	Defining Your Problem – Fishbone Diagrams		
7	Change Ideas		
8	Prototyping in Action – The Marshmallow Exercise		
9	Plan Do Study Act (PDSA) Cycles		
10	Spreading Change		
11	Networking and Close		

Each section:

- Introduces a new topic or technique
- Has a practice exercise or game to get familiar with the technique
- Contains a worked example of any template based on the practice project
- Has an exercise to do on your own LIVE project

If you want more time for exercises or discussion you can amend the recommended timing.



Preparing for the day:

1) Toolkit

Read through this guide thoroughly to ensure you have all the pre-requisite actions done. Also read the presenter notes on the PowerPoint.

2) Facilitator

Assign a local facilitator - somebody with good facilitation skills but not necessarily an improvement expert. This person will control the slides, pausing and resuming when instructed, control the timings, hand out templates and facilitate the exercises. If you have a large group attending, you may want to have a couple of facilitators to help with the exercises.

3) Timings

Decide if you will run the session as a single day or split it up. Adjust the agenda and venue requirements accordingly.

4) Venue

Book a suitable venue for the number of people attending. Cabaret style works best to allow participants to engage in the exercises as a small group. You will also need a **projector**, **speakers** and good **internet** connection to play the videos.

5) Topic

Agree the topic or challenge you will be working on. At this stage you won't know how you are going to approach the challenge, you just need to know what you would like to fix or accomplish.

6) Invitations

Invite your team to attend, giving details of the venue, timings and topic.



7) Materials

You will need to supply some materials and equipment for the day:

- Projector
- Speakers
- Internet
- String (made into "handcuffs")
- Flip chart paper 2-3 per table
- Pens
- Measuring tape
- Per table:
 - o 20 sticks of uncooked spaghetti
 - o 1 marshmallow (standard size not mini or jumbo)
 - o 1 metre of string
 - o 1 metre of sticky tape

8) Printing

You will need to print out copies of all the templates needed on the day:

- FIAD-04-01-Aims-Template 1 per person
- FIAD-04-02-Worked-Example 1 per person
- FIAD-05-1-Measures-Worked example minimum 1 per table
- FIAD-05-2-Measures-Template minimum 1 per table
- FIAD-06-1-Fishbone-Template minimum 1 per table as large as possible
- FIAD-06-2-Fishbone-WorkedExample 1 per person
- FIAD-06-3-Fishbone-PracticeProject 1 per person
- FIAD-07-1-FreshEyes-Template 1 per person
- FIAD-07-2-FreshEyes-WorkedExample 1 per person
- FIAD-09-1-PDSA-Template 2 per table
- FIAD-09-1-PDSA-WorkedExample 1 per person
- FIAD-10-1-Spread-Template 1 per person plus 1 per table
- FIAD-10-2-Spread-WorkedExample 1 per person



Presenting the day:

On the day, project the PowerPoint [Improvement Fundamentals in a day.ppt] so that all participants can see it. For each session there is a video link on the slide. Play the video but be ready to PAUSE when instructed. During the pause facilitate the exercise in the room, when it is complete continue with the video.

In the pauses, facilitate the exercises using the session plan guidance provided.

At the end of the day collect the necessary materials to apply for CPD Points for all the participants.





How to use this guide:

This guide contains two pages for each session:

1) Some **background** and pre-requisite information to help you run the day, this information is to assist the facilitator and does not necessarily need to be covered with the participants.

	FACILIATOR PRE-SESSION GUIDANCE				
Session 1 - II	- Introduction				
Facilitator background information and aim					
Duration	10 minutes				
Pre-requisites	Prepare the room, have materials to hand Set up the PowerPoint Test internet and speakers working FIAD Video 1				

2) A guide and list of **live facilitator actions** with instructions for you to do on the day with the participants.



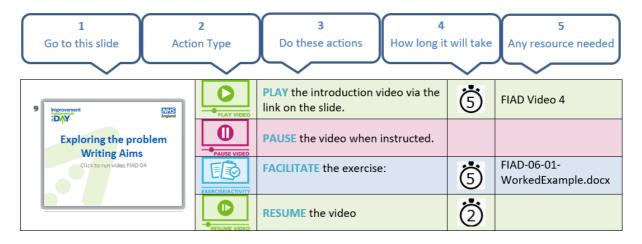
Read the background and pre-requisites well in advance to make sure you have everything with you and are prepared on the day.

Each session guides you through the actions and exercises required from you to ensure the day runs smoothly.

- Read the background section and ensure you have all materials required assembled or printed
- 2. Play the PowerPoint presentation and follow the session instructions
- 3. Pause and resume the video as required
- 4. Facilitate exercises or post topic discussion in the room.



Understanding the guide



Column 1) shows you which slide should be displayed at that moment.

Column 2) tells you what action you need to take, it is also coloured-coded to help you:

• Green background – are times when you are playing and watching the video.



- Play the video.
- Resume the video.
- Pink background is when you need to pause or stop the video.



- Pause the video.
- Stop the video.
- Blue background is when you will be facilitating an activity, exercise or discussion
 in the room with the participants, without the video.



- Explain something to the participants
- Facilitate an exercise or activity in the room.
- Have a discussion in the room

Column 3) describes the activity or action you should be doing.

Column 4) tells you how long to spend on that activity or how long the video is.

Column 5) details any resource required (videos, template, equipment etc).



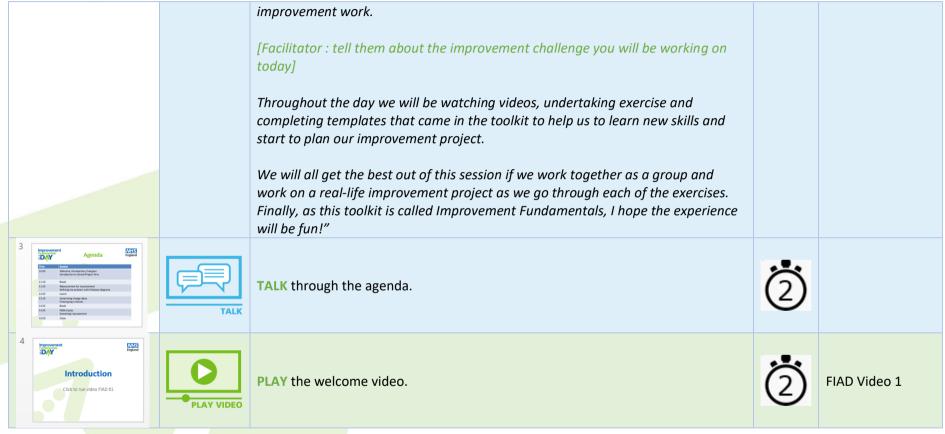
Session 1 - Introduction

This session is to explain the purpose and format of the day.				
10 minutes				
Prepare the room, have materials to hand				
Set up the PowerPoint				
Test internet and speakers working				
FIAD Video 1				
	10 minutes Prepare the room, have materials to hand Set up the PowerPoint Test internet and speakers working			



Session 1 - Introduction **Activity** Slide **Actions** Mins **Templates Type RUN** PowerPoint - Title slide. Do your housekeeping introduction (fire alarms, toilets, timings etc). We have created a standard introduction for you to use but if you would prefer to write your own, you can do that too. "Good morning, I am [your name] I will be your facilitator for the day. [Facilitator: cover local housekeeping information here. · Fire alarms and evacuation procedure · First aid person · Toilets · Breaks] Welcome to Improvement Fundamentals in a Day. This is a one-day session using a toolkit from NHS England and NHS Improvement. It is designed to be an out of the box quality improvement training and practical day to help us with our own







Session 2 - Energiser

Facilitator
background
information
and aim

This session is to start the learning with a buzz. Working through this problem has many parallels with the way people go about improvement. E.g.

- Some people like to jump straight to the prototyping stages while others like to stand and reflect on a problem.
- Some people want to be radical and try all kinds of weird and wonderful solutions, and some give up saying it can't be done. Others know that simply pulling the string will not make it come apart but continue to do it as it is the only thing they can think of to do. Parallels with "we've always done it this way around here".

This is a TOOL that can be used to open sessions in your own workshops to move everyone into the day understanding that stakeholders handle improvement in different ways.

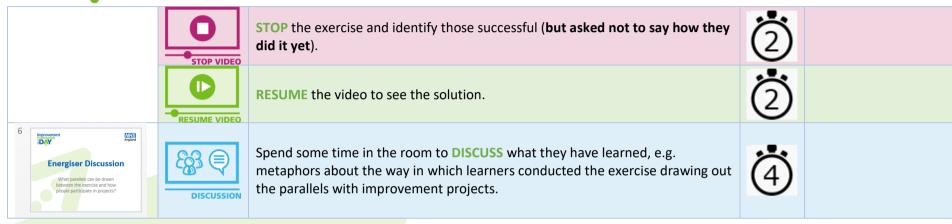
NOTE: If anyone is unable to use handcuffs due to motor skills, broken arm etc – they can pair up with another partnership as an observer. They can offer suggestions for the partners to act out and pay attention to the group dynamics.

Duration	20 minutes
Pre-requis <mark>ites</mark>	String made into handcuffs – 1 per participant - made up as per instructions in FIAD-01-Handcuff Instructions.pdf
	FIAD Video 2



Session 2 - Er	Session 2 - Energiser			
Slide Activity Type		Actions		Templates
	TALK	INTRODUCE the session.		
	PLAY VIDEO	PLAY the introduction video via the link on the slide.	1	FIAD Video 2
5 Inspresent Country C	PAUSE VIDEO	PAUSE the video when instructed.		
	EXERCISE/ACTIVITY	 FACILITATE the exercise: Ask group to get into pairs Ask group to place on handcuffs as demonstrated by Video Inform the group they have 10 minutes to work out how to free themselves from each other without removing or damaging the handcuffs. 	.	
	TALK	After 5 minutes give the group a clue "the solution is to be found in the loop on your left-hand side" and give them 5 more minutes.	(5)	







Session 3 - Introduction to Quality Improvement

	•				
Facilitator background	This session gives an overview of quality i	improvement, its use and background to set out the context for the day			
information and aim					
Duration	10 minutes				
Pre-requisites	FIAD Video 3				



Session 3 - Introduction to Quality Improvement **Activity** Slide **Actions** Mins **Templates Type INTRODUCE** the session. Introduction to **Quality Improvement** FIAD video 3 PLAY the video via the link on the slide. PLAY VIDEO Facilitate a **DISCUSSION** about the topic raised in the video: Introduction to What experience do participants have of QI? **Quality Improvement** Discussion Where have they seen it used well? Or badly? DISCUSSION



Session 4 - Exploring the Problem – Writing Aims					
Facilitator background	This session introduces the Model for Improvement and the project or improvement challenge that sets up learner				
information and aim	articipation for the whole day.				
Duration	30 minutes				
Pre-requisites	Templates printed out:				
	FIAD-04-01-Aims-Template – 1 per person				
	FIAD-04-02-Worked-Example – 1 per person				
	FIAD video 4				



Session 4 - Exploring the problem – Writing Aims					
Slide Activity Type		Actions		Templates	
	TALK	INTRODUCE the session.			
	PLAY VIDEO	PLAY the video via the link on the slide.	(5)	FIAD Video 4	
9 Pagronment COUSTS Topped Exploring the problem Writing Aims	PAUSE VIDEO	PAUSE the video when instructed.			
Click to run video PAD 04	EXERCISE/ACTIVITY	 Ask the participants to work in small groups or tables (6-8 is ideal) Hand out the worked example template to read Hand out the writing an aim statement template to groups Ask them to follow the instructions i.e.: List up to five potential ideas individually but one idea will do Discuss in group, each person sharing their best idea and agree one as a group As a group refine the aim Write up the final aim statement 	2 0	FIAD-04-02-Worked- Example FIAD-04-01-Aims- Template	



	5. Post it on the board		
	Keep an eye on the time and remind to move on after:		
	Part 1 - 5 minutes		
	Part 2 - 5 minutes		
	Part 3 - 5 minutes		
	Part 4 - 2 minutes		
	Part 5 - 3 minutes		
	While they are working: Place a single post it on the table with each group.		Post-its & pens
EXERCISE/A EXERCISE/A	While they are working: Stick up a piece of flip chart paper in the room with the words Aims statements written on it.		Flip chart & pens
RESUMI	RESUME the video when the time is up.	1	
10 Ingravement Ing	Facilitate a DISCUSSION using the questions below: How easy did you find the exercise? Did your group find agreeing an aim difficult?	(4)	

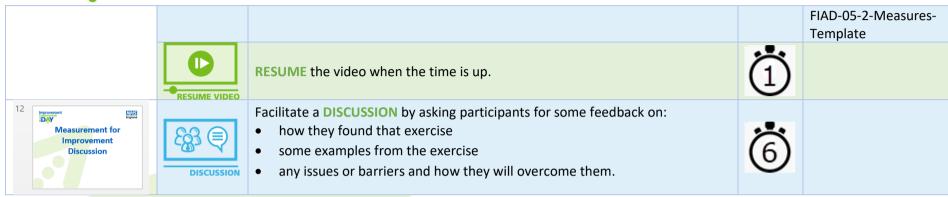


Session 5 - Measures						
Facilitator background	This session explores the model for imp	provement "How will we know a change is an improvement" in more detail.				
information and aim						
Duration	35 minutes					
Pre-requisites	Flip Chart & pens - 1 per table					
	Templates printed out:					
	FIAD-05-1-Measures-Worked example -	– minimum 1 per table				
	FIAD-05-2-Measures-Template – minimum 1 per table					
	FIAD video 5					



Session 5 - Measures					
Slide Activity Type		Actions		Templates	
	TALK	INTRODUCE the session.			
	PLAY VIDEO	PLAY the video via the link on the slide.			
11 Ingrovement DAY Measurement for Improvement Click to run video FAD 09	PAUSE VIDEO	During the quiz, gaps have been left to allow participants to answer the questions. Depending on the speed of your participants you may want to briefly PAUSE the video during the Quiz phase for each question.	8	FIAD Video 5	
	PAUSE VIDEO	PAUSE the video when instructed.			
	EXERCISE/ACTIVITY	 FACILITATE the LIVE PROJECT exercise in the room: Divide into table groups to develop a family of measures for their challenge/aim – use flipcharts. Ask participants to transcribe their agreed family onto the template 	2 0	Flip Chart & pens per table FIAD-05-1-Measures- Worked example	







Session 6	5 - De	fining the Problem – Fishbone Diagrams	

Facilitator background	e diagrams to effectively explore a problem and gives the participants an opportunity		
information and aim	to try it out themselves.		
Duration	35 minutes		
Pre-requisites	Templates printed out:		
	FIAD-06-1-Fishbone-Template - minimum 1 per table as large as possible		

FIAD-06-2-Fishbone-WorkedExample – 1 per person
FIAD-06-3-Fishbone-PracticeProject - 1 per person
Paper & pens
FIAD video 6



Session 6 - De	Session 6 - Defining the Problem – Fishbone Diagrams				
Slide	Activity Type	Actions	Mins	Templates	
	TALK	INTRODUCE the session.			
	PLAY VIDEO	PLAY the video via the link on the slide.	6	FIAD Video 6	
13 Progressional DAY Exploring the problem Fishbone Diagrams Clickto run video FIAD 65	PAUSE VIDEO	PAUSE the video when instructed and facilitate the PRACTICE PROJECT exercise. Participants should: 1) Work on tables/groups 2) Identify major factors missing 3) Take a branch and brainstorm more possible causes Attempt to identify a likely root cause.	Ö	FIAD-06-2-Fishbone- WorkedExample FIAD-06-3-Fishbone- PracticeProject	
	RESUME VIDEO	RESUME the video when the time is up.	1		
	PAUSE VIDEO	PAUSE the video when instructed			



	EXERCISE/ACTIVITY	Asks learners to form groups and ask them to: 1. Agree a problem statement based on the Aim 2. Work through a fishbone diagram a. Write the agreed problem at the head b. Identify the major factors c. Take each branch and brainstorm possible causes d. Identify the likely root cause While you monitor the room to make sure nobody is stuck.	(15)	Paper pens FIAD-06-1-Fishbone- Template
	RESUME VIDEO	RESUME the video when the time is up.	1	
14 Ingrovement IDES IDAY Fishbone Diagrams Discussion	DISCUSSION	Facilitate a DISCUSSION by the participants: getting some of the tables to share their key findings get everyone to stick the diagrams on the wall	.	



FIAD video 7

Session 7 - Ch	Session 7 - Change Ideas using the Fresh Eyes technique				
Facilitator background	Facilitator background This session encourages brainstorming with a fun way to generate new ideas.				
information and aim					
Duration	35 minutes				
Pre-requisites	Templates printed out:				
	FIAD-07-1-FreshEyes-Template – 1 per person				
FIAD-07-2-FreshEyes-WorkedExample - 1 per person					



Session 7 - Change Ideas using the Fresh Eyes technique				
Slide	Activity Type	Actions	Mins	Templates
	TALK	INTRODUCE the session.		
15 Insprovement INTES	PLAY VIDEO	PLAY the video via the link on the slide.	(5)	FIAD Video 7
Finding Change Ideas Click to run video FIAD 06	PAUSE VIDEO	PAUSE the video when instructed		
	EXERCISE/ACTIVITY	 FACILITATE the PRACTICE PROJECT exercise by: Hand out the roles template Give the participants 5 minutes to consider the PRACTICE PROJECT from the perspective of the role on the template After 5 minutes ask them to share their ideas on the table – allow a further 5 minutes. 	10	FIAD-07-2-FreshEyes- WorkedExample
	DISCUSSION	RESUME the video when the time is up.		



	PAUSE VIDEO	PAUSE the video when instructed.		
	EXERCISE/ACTIVITY	 Assign table groups a profession - how would a "chef" tackle your problem? Give the participants 10 minutes to brainstorm "How would a tackle this?" and put ALL the ideas onto a flipchart page while you monitor and enforce the rules: No discussion or debate – all ideas are valid Watch body language as well – raised eyebrow or a frown can stifle ideas. 	i 5	FIAD-07-1-FreshEyes- Template
	RESUME VIDEO	RESUME the video when the time is up.	1	
16 Ingrovement DAY Change Ideas Discussion	DISCUSSION	 Facilitate a DISCUSSION using some of the questions below: Select their best and their wildest idea to share and post on the wall. Was there a leader on their team? Who was it and who decided who the leader would be? If they had no leader, do they think having designated someone a leader would have helped? If they had a leader, how did he/she do? Did any team members tune out of the activity — out of frustration with other members or for some other reason? What could you have done to keep all members of the group fully engaged? Did everyone feel their ideas were well received during the activity? 	(4)	

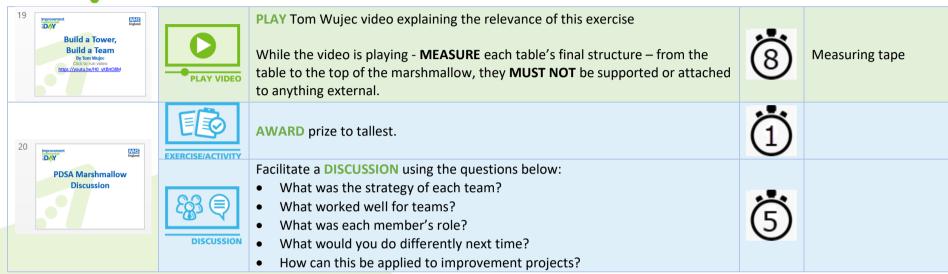


Session 8 - PDSA with the Marshmallow exercise				
Facilitator background	This session encourages team working and creativity and gives them experience of PDSA and provides some light relief and			
information and aim	energising after lunch.			
Duration	30 minutes			
Pre-requisites	Marshmallow materials:			
	Per table:			
	20 sticks of uncooked spaghetti			
	1 marshmallow (standard size not mini or jumbo)			
	1 metre of string			
	1 metre of sticky tape			
	Facilitator: 1 measuring tape			
	FIAD video 8			



Session 8 - PDSA with the Marshmallow exercise				
Slide	Activity Type	Actions	Mins	Templates
		Ensure marshmallow exercise materials pack has been distributed in advance		
PDSA in action	TALK	INTRODUCE the session.		
Luck to run yadeo HAU U7	PLAY VIDEO	PLAY the video via the link on the slide.	(1)	FIAD video 8
Instructions • Teams of 4.5 members • Teams of 4.5 members • Unpack tape, string, spaghettl, mershmallow and cissors • 1.0 minutes to build tallets, free standing structure • The marshmallow must be attached to the top of the structure	EXERCISE/ACTIVITY	 When the video ends FACILITATE the exercise: Monitor tables as they participate in Marshmallow exercise to ensure no cheating and everyone understands the rules RULES: Build the tallest freestanding structure-measured from the table top surface to the top of the marshmallow. The entire marshmallow must be on top. Use as much or as little of the kit. Teams are free to break the spaghetti or cut the tape and string. Time the exercise - When the time runs out STOP the activities and bring participants back to watch the video. 	.	Marshmallow materials per table: 20 sticks of uncooked spaghetti 1 marshmallow 1 metre of string 1 metre of sticky tape





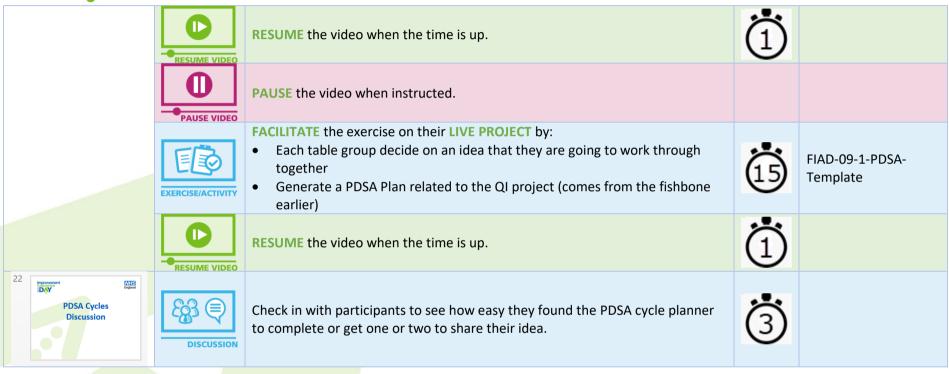


Session 9 - PDS	Session 9 - PDSA Cycles					
Facilitator background	This session draws parallels between the PDSA cycle from the marshmallow exercise and the existing challenge / aim.					
information and aim	Inviting the learners to complete a PDSA cycle template to plan a PDSA cycle linked to their local project.					
Duration	35 minutes					
Pre-requisites	Templates printed out: FIAD-09-1-PDSA-Template – 2 per table FIAD-09-1-PDSA-WorkedExample – 1 per person FIAD video 9					



Session 9 - PE	Session 9 - PDSA Cycles				
Slide	Activity Type	Actions	Mins	Templates	
	TALK	INTRODUCE the session.			
	PLAY VIDEO	PLAY the video via the link on the slide.	(5)	FIAD video 9	
21 Improvement Copins	PAUSE VIDEO	PAUSE the video when instructed.			
PDSA Cycles Click to run video FIAD 08	EXERCISE/ACTIVITY	Pick one item on the journey to work fishbone and complete the template in your groups: Under PLAN Decide together what action you want to take Under DO How you will go about that Under STUDY How you will measure it And under ACT How you will know when you achieve it There is a worked example on your table for reference	10	FIAD-09-1-PDSA- Template FIAD-09-1-PDSA- WorkedExample	







Session	10 -	Spread

Session to - Spread					
Facilitator background	This session is a discussion that links back to the beginning and spread considerations as you move through the whole process.				
information and aim	Helping participants plan for how they will spread the knowledge about what they are doing – how to connect and identify who				
	might be interested.				
Duration	35 minutes				
Pre-requisites	Templates printed out:				
	FIAD-10-1-Spread-Template - 1 per person plus 1 per table				
	FIAD-10-2-Spread-WorkedExample - 1 per person				
	FIAD video 10				



Session 10 - Spread					
Slide	Activity Type	Actions	Mins	Templates	
	TALK	INTRODUCE the session.			
23 Insprovement Spreading Improvement Click to run video FAD 10	PLAY VIDEO	PLAY the video via the link on the slide.	3	FIAD video 10	
	PAUSE VIDEO	PAUSE the video when instructed			
	EXERCISE/ACTIVITY	 FACILITATE the PRACTICE PROJECT exercise by: In groups: Discuss strengths and weaknesses of the following activity: "write up your top ten tips to improve team meeting attendance and share it in your internal newsletter" Look at worked example 	.	FIAD-10-2-Spread- WorkedExample	
	Resume	RESUME the video when the time is up.	1		



	PAUSE VIDEO	PAUSE the video when instructed.		
	EXERCISE/ACTIVITY	 FACILITATE the LIVE PROJECT exercise: Participants have 1 minute to come up with spread ideas for their live project individually. 	(1)	FIAD-10-1-Spread- Template
	EXERCISE/ACTIVITY	FACILITATE 10 minutes to share ideas with the rest of the table.	10	
	EXERCISE/ACTIVITY	 FACILITATE 10 minutes for each table to agree the top 5 ideas: appraising the strengths and weaknesses complete the spread plan Give them a warning 5 minutes before the time is up to start writing things on the plan.	10	
	RESUME VIDEO	RESUME the video when the time is up.	1	
24 Ingrovement Discussion	DISCUSSION	 FACILITATE a short DISCUSSION allowing participants to feedback, share and critique: Ask participants for their reflections on the activity. Do they normally complete a spread plan when undertaking improvement work? 	(4)	



Session II - Networking and close					
Facilitator background information and aim					
Duration	10 minutes				
Pre-requisites	Templates printed out: FIAD-11-01-CPDForm FIAD video 11				



Session 11 - Networking and close					
Slide	Activity Type	Actions	Mins	Templates	
25 Ingrovement DISS trajent	TALK	INTRODUCE the session.			
Networking Click to run video FIAD 11	PLAY VIDEO	PLAY the video via the link on the slide.	2	FIAD video 11	
26 Ingrovement INTS England Summary	TALK	 SUMMARISE the day: What have you learnt. What are the local next steps. 	Ö		
Proceedings of the Hard State	TALK	 Thank everyone for coming. Tell them where to find out more. Collate evaluation and CPD evidence. 	(8)		