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Addendum to Value Management Pack

Value Management Collaborative

This pack has been produced to support mobilisation of teams following hibernation due to COVID-19. It assumes that people who are supporting teams are familiar with the contents of the original Value Management pack. The contents of this addendum will also be helpful in preparing for scale-up and spread of a value management approach.

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Introduction

The Value Management Collaborative launched in November 2019 and will complete in March 2022. In March 2020, a decision was made to hibernate all collaborative activity to support a system response to COVID-19. Collaborative activity will resume in August 2020.

This addendum to the Value Management pack has been developed from existing resources and learning gained from the early months of collaborative activity. The addendum sets out an abbreviated pathway for preparing teams to undertake the work of value management and will be useful to guide improvement coaches and the national team in

- providing a refresher for teams that had been working on value management prior to hibernation for COVID-19, and
- preparing new teams for scale-up and spread.

The contents of this have been developed by the ihub at Healthcare Improvement Scotland (HIS), NHS Education for Scotland (NES) and the Institute for Healthcare Improvement (IHI) and should be used to access a variety of linked resources which are available on the [Value Management Collaborative](#) team on MS Teams. If you are not already a member of the team please request to join via the link above.

Any changes to existing resources that are included in this addendum have been applied to the original Value Management pack to ensure continuity of approach.

Resources for mobilisation

Section	Topic	Resource	Why use it	What it is	Templates & further Information
1	Preparing teams	3a. Position Statement	A position statement is used to create interest in a project, idea, or product.	A position statement is a brief, persuasive speech that you use to spark interest in your work. A good position statement should last no longer than 20 to 30 seconds.	Position Statement
		3d. Team Agreement	Successful implementation of Value Management requires consistent support and participation in the process of coaching. A team agreement will be important to clarify expectations, roles and responsibilities of team members and coaches	A team agreement sets the ways of working for the coaching relationship so that both parties know their obligations.	Team Agreement
		3f. Team readiness assessment guide (short version)	There are lots of factors to do with the context in which teams work that will impact on the viability of their Value Management work. These factors include: the team working on the project, the microsystem in which they function, local QI support and capacity, the organisation in which they work, and the environment external to their organisation. Undertaking a readiness assessment will help teams recognise areas for development and produce a prioritised plan to address any gaps.	The readiness guide includes a set of questions to prompt discussion and inform the actions and support that a team will need to implement Value Management	Team readiness guide

		3g. Pre-work pack	Pre-work is an essential part of team preparation. The pre-work guide will help coaches and teams work together to identify their specific areas of challenge, focus, aims and associated measures.	This guide supports improvement coaches and team leads to work together to set the foundations for their work on Value Management in relation to measure selection. It should be used following completion of the team readiness guide and team agreement.	Pre-work pack
2.	Building visual management & getting ready for huddles	Selecting team aims - linkage	<p>Conducting this exercise will enable teams to identify a small set (5-7) of aims and measures that are meaningful to them.</p> <p>Linking these measures to the organisation's objectives will help strategic leaders to effectively support the team's improvement efforts and understand how they fit with organisational strategy.</p>	The linkage exercise is important to help teams identify a set of meaningful measures and make explicit the relevance of these measures to the organisations strategic objectives. The linkage chart helps teams to select performance measures to inform quality planning, improvement or control.	Selecting team aims – linkage
		Process Mapping	To capture and visually represent all the steps in an existing process and to show a team how a process works in practice, rather than what is thought to happen. A process map also helps identify ideas for change and to visually represent a new process.	A visual display that shows where a process starts and ends and the sequence of steps in between in the order that they happen. Process maps can be used at different levels from a high level, less detailed map to a more detailed process map that breaks down bigger steps into smaller chunks depending on the level of analysis required.	Process Mapping https://learn.nes.nhs.scot/2272/quality-improvement-zone/qi-tools/process-mapping
		Building visual management	Using a visual management board allows everyone to get on the same page quickly to	A visual management board is a tool that displays data over time, linked analyses of this data and related	Building visual management

			<p>support rapid recognition of defects and opportunities for improvement.</p> <p>Using visual management allows teams to engage in continuous improvement where multiple, complex improvement projects are running at the same time.</p> <p>Visual management supports quality planning, improvement and control.</p>	<p>improvement work. It includes the box score, process maps and PDSA cycles. Data can be displayed in many ways, the principle being that it is easy to update and change.</p> <p>The content of visual management boards drive weekly huddles.</p>	
		4a. Box score template	<p>The box score serves as the anchor for Value Management by capturing data over time across measures of performance and quality, capacity and cost.</p>	<p>It provides an understanding of clinical and financial data by setting out measures that fit on one sheet of paper and cover three domains: Performance, Capacity and Cost measures. The template provides a range of measures across the three domains that can be used in a variety of service settings.</p>	<p>Box score template</p> <p>A simple way to involve frontline clinicians in managing costs</p>
		4e. Huddle script	<p>The huddle script ensures consistent fidelity to the huddle agenda and ensures a good flow is maintained.</p>	<p>It is a sample script which outlines why the huddle is important, how it should be run and what areas should be focused on during the huddle, followed by a deeper dive and any coaching sessions.</p>	<p>Huddle script</p>

		4f. Huddle checklist	It supports good practice for huddle management by ensuring all areas of Value Management are incorporated into the huddle and team discussion.	A check sheet to track that aspects of the huddle have been completed before, during and after the huddle allocated time.	Checklist
		6c. PDSA tracker	To track when sequential PDSAs are being carried out to help achieve an aim.	A tool that allows recording of a specific aim and change idea that is being tested and can record the 'study and act' summary of each cycle within that to provide an overview to the team.	PDSA tracker
		7a. Prioritisation matrix	In any improvement project there will be a number of different change ideas that could help you to achieve the desired outcome. Prioritisation matrices help you decide which change ideas to test first.	The prioritisation matrix is a structured visual tool to help you decide which improvement ideas to test first and how to focus your activity and energy. It works best in a collaborative environment and can help to build buy-in and communicate why you have chosen to test certain ideas before others.	NHS Education for Scotland TURAS Learn QI Zone
3	Education - VM Methods	Linkage Exercise	See section 2: Selecting team aims – linkage . The slide set linked here will provide step by step guidance to undertaking this exercise.		Linkage Exercise
		Box Scores	See section 2: 4a. Box score template . The slide set linked here will provide guidance on population of box scores.		Launch Event – Breakout 1A session
		Capacity Measures	Measuring staff capacity helps drive improvements to reduce wasted time and improve time spent on direct patient care.	A measure of time spent on direct, indirect and available staff time. The aim is to optimise time spent on direct care delivery.	Capacity Measures

			Capacity measurement can drive improvements in overall efficiency, throughput, staff satisfaction and engagement.		
		Finance Measures	Weekly finance data is a critical element of the box score and weekly huddles. While weekly data is the standard teams should work towards, some data that is currently available on a monthly basis can be used to populate the box score in the interim by following this guidance.	Finance data is necessary to calculate a fundamental measure of Value Management i.e. cost per patient seen/item processed. It analyses data relating to variable costs such as drugs, sundries or additional staffing.	Finance Measures
		Huddles	They are a communication tool to proactively engage the whole team in managing quality and safety and include representation from across the system	Weekly multidisciplinary huddles are a core practice in Value Management. The huddles use visual management boards to share testing and learning and enable planning.	Huddles
	Education - Measurement	Pareto	Using a Pareto chart helps a team concentrate its improvement efforts on the factors that have the greatest impact. It also helps a team communicate the rationale for focusing on certain areas. They are a useful tool not only when identifying opportunities for improvement, but also in drilling down to understand the reasons for variation on graphs showing counts, percentages and rates.	Pareto analysis is a tool to help understand a system. A Pareto chart is a type of bar chart in which the factors that contribute to an overall effect are arranged in order from most frequent to least. This ordering helps identify the "vital few" — the factors that warrant the most attention.	Pareto https://learn.nes.nhs.scot/2348/quality-improvement-zone/qi-tools/pareto-chart

		Run Charts / Variation	<p>Every visual management board should include run charts for measures that are a current focus of improvement work.</p> <p>Run charts are one of the most useful tools in quality improvement. They allow us to:</p> <ul style="list-style-type: none"> • Look at our data over time to assess performance and see whether there are any patterns • Assess and show whether changes are resulting in improvement • Monitor measures, to see whether improvement has been sustained. 	<p>A run chart is a line graph of data plotted over time. By collecting and charting data over time, you can find trends or patterns (variation) in the process or system performance.</p> <p>Run charts are an essential element of visual management for both quality improvement and control.</p>	<p>Workshop 2 - 1F - Understanding Variation</p> <p>https://learn.nes.nhs.scot/3048/quality-improvement-zone/qi-tools/run-chart</p>
		Visual Display of Data	<p>The linked slide set will help teams to understand how best to present data for greatest impact and be able to use data, visualisation and storytelling to win hearts and minds and gain support for their work</p>	<p>Visual Display of Data</p>	
	Education – Methodology	Model for Improvement & Aim Statements	<p>A team would use the tool as a framework for applying the five fundamental principles of improvement:</p> <ul style="list-style-type: none"> • Knowing why there is a need to improve • Being able to interpret if improvement is happening through measurement • Developing an effective change theory • Testing a change before moving to implementation • Knowing when to implement a change 	<p>The “Model for Improvement” is a simple powerful tool for accelerating improvement. It is comprised of 2 key parts:</p> <ul style="list-style-type: none"> • 3 fundamental questions that drive all improvement; and • The Plan-Do-Study-Act (PDSA) cycle. <p>Combined, the three questions and the PDSA cycle form a framework to support continuous improvement.</p>	<p>Workshop 2 - 1C - Aim Statements</p> <p>https://learn.nes.nhs.scot/2959/quality-improvement-zone/qi-tools/model-for-improvement</p>
			Driver Diagrams & Measures	<p>To visually present a team’s theory of change for how an improvement goal might be achieved. Ensure everyone working on</p>	<p>A simple visual display which logically outlines the improvement aim, primary</p>

		improving their system has a shared sense of why, to provide focus and support measurement.	driver, secondary drivers and change ideas.	Workshop 2 - 1D - Driver Diagram & Family of Measures https://learn.nes.nhs.scot/2278/quality-improvement-zone/qi-tools/driver-diagram
	PDSA cycles	<p>We use PDSA cycles to learn what happens when we try to do something differently</p> <p>There are 3 common reasons to use the PDSA cycle in an improvement effort:</p> <ul style="list-style-type: none"> • To build knowledge to help answer any of the three questions in the Model for Improvement • To test a change • To implement a change <p>Most purposeful improvements will require multiple cycles to further build knowledge.</p>	<p>Plan Do Study Act (PDSA) cycles are an ideal quality improvement tool that can be used to test an idea by temporarily trialling a change and assessing its impact. It is a structured 4-step cycle which requires effort and discipline. The PDSA cycle originates from industry and has been incorporated in to the Model for Improvement.</p>	Workshop 2 - 2B - Testing Change Ideas https://learn.nes.nhs.scot/2274/quality-improvement-zone/qi-tools/pdsa
Education - Working with teams	Facilitation	<p>Effective facilitation of teams will</p> <ul style="list-style-type: none"> • Help in their thinking, planning and decision-making • Bring clarity to discussions about Quality Improvement. • Provides leadership without taking the reins • Be concerned with content, process and the management of emotions 	<p>A set of skills and techniques that help coaches and facilitators support teams to undertake the work of Value Management and transition them to independence.</p>	Workshop 2 - 2D – Facilitation https://www.england.nhs.uk/improvement-hub/wp-content/uploads/sites/44/

			<ul style="list-style-type: none"> Make it easier to reach the agreed destination. 		2017/11/Facilitator-Toolkit.pdf
		Establishing a team	Sustained improvement in any given situation requires effective team working, collaboration and project management.	A set of tools and resources that guide effective team set up and ways of working.	Workshop 2 - 1B - Establishing a Team https://learn.nes.nhs.scot/27414/quality-improvement-zone/improvement-journey/create-conditions/facilitating-improvement-teams
		Spread	<p>In the context a Value Management, the approach of box score, visual management and huddles are designed to be spread throughout organisations. This should be planned during the pilot team phase.</p> <p>In addition, there will be improvement projects and ideas that are likely to be spreadable this should be planned for from the beginning of an improvement project.</p>	Spread describes the process by which we take change ideas beyond the initial area of testing to new areas or teams. Spread normally takes place once a change idea has been successfully implemented and sustained under a variety of conditions. This section focuses on some key principles and practical tools that will help to spread your improvement ideas.	Workshop 2 - 1G - Plan for Scale & Spread https://learn.nes.nhs.scot/825/quality-improvement-zone/improvement-journey/spreading-improvement
		Coaching Conversations	The linked slide set provides guidance on the use of coaching techniques in the context of Value Management.		Workshop 2 - 2E - Value Management Coaching

Appendix 1: Summary of resources

Section	Topic/Content
1	Preparing teams <ul style="list-style-type: none"> 3a. Position statement 3b. Team agreement 3f. Team readiness guide 3g. Pre-work pack
2	Building visual management & getting ready for huddles <ul style="list-style-type: none"> a. Selecting team aims – linkage b. Process mapping c. Building visual management d. Box score template e. Huddle script f. Huddle check list g. PDSA tracker h. Prioritisation matrix
3	Education <p>VM Methods</p> <ul style="list-style-type: none"> a. Linkage exercise b. Box scores c. Capacity measures d. Finance measures e. Huddles <p>Measurement</p> <ul style="list-style-type: none"> a. Pareto b. Run charts / Variation c. Visual display of data <p>Methodology</p> <ul style="list-style-type: none"> a. Model for Improvement & Aim Statements b. Driver Diagrams & Measures c. PDSA's <p>Working with Teams</p> <ul style="list-style-type: none"> a. Facilitation b. Establishing a team c. Spread d. Coaching Conversations