

Hibernating Quality Improvement Programmes

A Guide for Health and Social Care Organisations

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# Introduction

This guidance has been prepared to support health and social care organisations on how to plan and respond to the impact of Covid-19 on quality improvement (QI) programmes. The guidance outlines steps required when hibernating QI programmes to make it easier to then reinstate them later on this year.

Thank you to NHS Lothian for alerting us to the importance of appropriately hibernating QI programmes and to staff from NHS Lanarkshire, NHS GG&C and NHS Grampian for sharing with us their thoughts on what it should cover. This document is provided as a working draft in the spirit of us all learning together in these unusual times; if you spot key issues we have missed then please do let us know on [info@ihub.scot](mailto:info@ihub.scot).

# Guidance

The information set out in this document is intended as guidance. Please read through each section and action those items that are relevant and appropriate to the QI programmes(s) within your organisation. Please see appendix 1 for this information in checklist form.

It is also important to pay notice to information/knowledge that you gather throughout a QI programme but do not necessarily record. You may wish to create a record of this information as it will likely be important when reinstating your programme(s) of work.

1. **Communication** 
   1. Communication of plans to hibernate QI programme(s) to all project participants (all tiers of staff) and stakeholders (email, social media, QI notice boards and internal/external webpages)
   2. Update and file all communication plans
   3. Any ongoing evaluations should be put on hold
2. **File Management/Project Documentation** 
   1. Create (if not already in place) a central folder structure for all files/documentation on the main network drive ensuring this is communicated to the project team
   2. Project related files from personal drives should be moved into the main network drive
   3. Old versions of document should be saved into an archive folder
   4. Documents should be named in line with locally agreed naming convention
   5. Create an up to date contact list of all project participants and key stakeholders
   6. Ensure your project plan is up to date
3. **Email Correspondence** 
   1. Review and save all relevant emails from email inbox to appropriate file on the main network drive
   2. Identify any mailboxes relating to QI programmes and set up an automated announcement of the current situation and offer alternative channels of communication
4. **Stakeholder Engagement and Knowledge Management** 
   1. Review and save all relevant emails from stakeholders to appropriate files on the main network drive
   2. Create a record (see appendix 2 for a suggested template) of each participating team and their current project status at the point of hibernation. It will be helpful to include any key information that may be useful to be sighted on at the point of reinstating including:
      * + - Development issues you are in the midst of working on with the team
          - The key champions at a local level driving the work forward
          - Key lessons learnt to date
          - Time permitting, you may wish to include personal reflections outlining key challenges expected when reinstating
   3. Review and update relevant reporting schedules and action plans where necessary
5. **Events and meetings** 
   1. All meetings, events, workshops and training relating to the QI programme(s) should be postponed where appropriate
   2. Notify all registered participants of postponement and file emails
   3. Notify all speakers, chairs and facilitators of postponement and file emails
   4. File all resources, including minutes, agendas and presentations
   5. All event registrations (Eventbrite) should be closed with confirmation of cancellation filed
   6. Ensure that all internal/external providers are notified (room booking, catering)
   7. Create and file a record of all cancelled meetings, events, workshops and training
6. **Risks**

6.1 Update any risk systems/project logs with current information and file

1. **Budget** 
   1. All budgetary implications should be discussed with strategic/finance leads and actioned where appropriate

# Appendix 1 - Hibernating Quality Improvement Programmes Checklist

Programme Title:

Lead:

| **Theme** | **Action** | **Responsible** | **Tick when complete** | **Comments** |
| --- | --- | --- | --- | --- |
| Communication | Communication of plans to hibernate QI programme(s) to all project participants (all tiers of staff) and stakeholders (email, social media, and internal/external webpages) |  |  |  |
| Update and file all communication plans |  |  |  |
| Any ongoing evaluations should be put on hold |  |  |  |
| File Management/ Project Documentation | Create (if not already in place) a central folder structure for all files/documentation on the main network drive ensuring this is communicated to the project team |  |  |  |
| Project related files from personal drives should be moved into the main network drive |  |  |  |
| Old versions of document should be saved into an archive folder |  |  |  |
| Documents should be named in line with locally agreed naming convention |  |  |  |
| Create an up to date contact list of all project participants and key stakeholders |  |  |  |
| Ensure your project plan is up to date |  |  |  |
| Email Correspondence | Review and save all relevant emails from email inbox to appropriate file on the main network drive |  |  |  |
| Identify email mailbox relating to QI programmes and set up an automated announcement of current situation and alternative channels of communication |  |  |  |
| Stakeholder Engagement and Knowledge Management | Review and save all relevant emails from stakeholders to appropriate file on the main network drive |  |  |  |
| Create a record (update if already in place) of each participating team and their current project status at the point of hibernation. It will be helpful to include any key information that may be useful to be sighted on at the point of reinstating. |  |  |  |
| Review and update relevant reporting schedules where necessary |  |  |  |
| Events and meetings | All meetings, events, workshops and training relating to the QI programme(s) are postponed |  |  |  |
| Notify all registered participants of postponement and file email(s) |  |  |  |
| File all resources, including minutes, agendas, presentations |  |  |  |
| Notify all speakers, chairs and facilitator of postponement and file email(s |  |  |  |
| All event registrations (Eventbrite) closed with confirmation of cancellation filed |  |  |  |
| Ensure that all internal/external providers are notified (room booking, catering) |  |  |  |
| Create and file a record of all cancelled meetings, events, workshops and training |  |  |  |
| Risks | Update any risk systems/project logs with current information and file |  |  |  |
| Budget | All budgetary implications should be discussed with strategic/finance leads and actioned where appropriate |  |  |  |

# Appendix 2 - Quality Improvement Programme Summary Template

Programme Title:

Lead:

| **Team (ward, practice, site)** | **Project lead(s)** | **Current Stage**  **(Scoring below)** | **Key Challenges** | **Key Successes** | **Next Steps** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- |
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| --- | --- | --- |
| **Score** | **Stage of Project** | **Description** |
| 1 | Project area identified and agreed | Project has been identified and agreed with senior supporters |
| 2 | Project Plan and team in place | Project Planning documentation (rationale, aims, scope, resources, timescales, measures, expected outcomes) completed and project team formed. |
| 3 | Understanding system | Current state - applying tools to understand processes and people, including readiness for change and analysis of baseline data |
| 4 | Aim and change theory developed | Knowledge of the system and other evidence of what could work have been brought together into a theory of change |
| 5 | Change ideas and project measures developed | Range of specific change ideas developed, measurement plans established and initial pdsa's being planned |
| 6 | Testing underway | Testing strategy developed, and is being deployed.  Data being gathered and charted. |
| 7 | Initial indications of improvement | Anecdotal evidence or feedback that changes are resulting in improvement. |
| 8 | Improvements achieved | Evidence of improvements shows in project measures.  Implementation plans are being developed and deployed. |
| 9 | Sustainable improvement | Implementation plans have been deployed for key changes.  Data indicates sustainability of impact of changes implemented in system. |
| 10 | Project complete | The aim was met or exceeded and improvement sustained.  Changes are now part of business as usual. |

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