



Guide to a Successful Action Plan Session

I. Assure Staff Confidence in Data.

- If you are getting data from an EMR report, you may hear comments that this and that exclusion was not considered thus tainting the data. This can be a defensive reaction of clinicians who are frustrated or apprehensive of reviewing their personal performance. If the physician champion is confident in the data collection process, and if the data collection process remains consistent nit picking each and every potential exclusion is not necessary. The goal is to see change, not to get the 'perfect' report. Sometimes self-audits by providers can help instill confidence in data more than an EMR report. The physician champion needs to communicate the data collection process clearly and confidently so that the first action plan discussion is productive, as opposed to a defense of the data.

II. Encourage staff participation

- Workflows for vaccination may effect multiple types of clinicians on your staff. The most productive discussion includes representatives from all professions involved. When the entire staff is involved in discussing practice changes you will foster buy in for the project from those expected to put the plan in action and create a more effective intervention.

III. Allow the providers to digest the data

- Clearly state the definition for each metric and allow the providers to observe and reflect on their performance. Do not rush into giving your opinion of the result before the group has had a chance to make some comments.
- Open Ended Questions!!
 - "What surprises you about this data?"
 - "Which metrics motivate you to implement change?"
 - "Which metrics do you think would be the easiest to improve upon? The hardest? Why?"

IV. Identify Improvement areas then get specific

- Allow the group to identify 1 or 2 measures that they want to focus on and then use your remaining discussion time to identify the current workflow leading to your current performance and proposing practice changes you can test for improvement. You must know what is currently done to begin proposing specific changes that could be tested for improvement.
 - "What is the current workflow related to the measure you most want to improve?"
 - Ex. If the group wants to improve the rates of vaccine series completion you might want to find out which type of providers are able to give 2nd/3rd doses of vaccine. Are physicians the only ones allowed to vaccinate? Can mid-level providers issue vaccines too?
 - Ex. If the group is hoping to improve the rates of vaccine initiation you might want to ask how providers introduce the vaccine to



patients/parents? Do they describe it similarly to other vaccines? If not, why? How could this lead to lower vaccination rates?

V. Do Not End the Discussion!

- You may need more than 1 meeting to formulate the details of your intervention. Once the intervention has been planned, be sure to provide continuous performance feedback to the group so they can see the effects of their practices changes. You should also allow the group to discuss their experience with the intervention. Perhaps the intervention is working but is causing much frustration among the staff. How can the process be streamlined? Improved?