INTRODUCTION

A key component of the accreditation process, as administered by the Public Health Accreditation Board (PHAB) is the development of a health department quality improvement (QI) plan, and health departments are required to report on their QI activities annually. Quality improvement is the cornerstone for the national public health accreditation program and the reason that many health departments have been interested in pursuing accreditation. Early findings from reviews of the first several cohorts of accredited health department annual reports indicates that, while accredited health departments have made a commitment to advancing QI in their settings, they still have much to learn about some of the most effective ways to do that. PHAB has identified gaps in health department QI knowledge and consistent application of that knowledge in order for them to mature as strong QI agencies. One of the benefits of being accredited is to work with PHAB to strengthen and grow the health department QI culture.

With funding from the Robert Wood Johnson Foundation (RWJF) and in partnership with Continual Impact, LLC, (CI) PHAB is managing the development of a QI Leaders Academy. The goal of the QI Leaders Academy is to develop QI leaders with the knowledge and skills to help build high performing cultures of quality and to incorporate the sustainability of those efforts through the accreditation process. The QI Leaders Academy will focus on one of the key roles in organizations as they try to establish a culture of quality – that of the QI leader. This scope of work covers the initial training of a group of twelve QI leaders in foundational QI skills – including the Kaizen event process and techniques – and solidifies those skills by coached, on-site applications that achieve benefits for the organization. It then goes beyond those skills by teaching how to identify key opportunities at the organizational level through a comprehensive annual QI planning process and how to successfully apply QI techniques with project teams to achieve timely and measurable results. This approach chosen for the QI Leaders Academy includes teaching: a) comprehensive planning skills and techniques, b) expanded change management, c) skills to teach others foundational QI techniques (including the QI for Individual Contributor course); and, d) by providing additional coached on-site applications of the annual planning process with the site leadership team. Health departments can then incorporate updates on these efforts into the PHAB-required accredited health department annual reports over the duration of the health department’s five year accreditation
cycle. Health departments who participate in the program will also have the opportunity to 
update and improve their organizational QI plan, increase their QI results, and involve other 
staff in furthering their culture of QI.

In addition to the training and on-site application, the QI Leaders Academy will form the basis 
of a community of practice for QI Leaders to share with each other. In order to grow the 
community, we will invite the participants of the recent COPPHI Kaizen program to join the 
QI Leaders Academy in order to share their Kaizen learning. They will also receive the same 
training in the annual QI planning education and be able or improve their annual QI plan 
during a coached on-site application.

Submission of a proposal for the QI Leaders Academy is not a requirement for reaccreditation. 
PHAB has not targeted any specific health departments for this opportunity. Rather, accredited 
health departments should consider the QI Leaders Academy as one more benefit of 
accreditation and one more opportunity to enhance their QI culture. The activities will provide 
multiple benefits for QI Leaders, their health departments and the customers they serve. The 
foundational and Kaizen skills will aid in achieving and sustaining organization benefits at a rate 
faster than previously experienced. The capability of the QI Leaders to teach foundational skills 
in combination with future Kaizen events should increase the opportunity and ability of team 
members to engage in QI at a greater frequency and more effectively. The QI planning skills and 
process will help organizations sharpen their focus on identifying important improvement areas, 
improving execution of improvements and in achieving measureable benefits. The QI Leader will 
personally grow in their knowledge and in their capability to apply the knowledge after training, 
coaching and sharing with a community of practitioners. Ultimately the continued development 
of the QI Leaders and their impact on their organizations is expected to help build high 
performing cultures of quality and improve the effectiveness and efficiency of services to 
customers beyond historical norms.

**QI LEADERS ACADEMY GOALS**

- To continue the development of QI Leaders with the knowledge and skills to help build 
high performing cultures of quality for Accredited Health Departments

- So that Health Departments:
  - Can improve the effectiveness and efficiency of their services beyond historical 
  norms.
  - Can demonstrate that QI efforts yield higher returns on investment.
  - Are focused on areas that are most important to its stakeholders and produce 
greater results faster than previously achieved.
  - Provide team members the opportunity to become more deeply engaged in QI 
  projects and apply QI on a daily basis.
  - Support QI Leaders to replicate their knowledge and skills in others so that QI 
sustains over time.
  - Sustain their accredited status and strengthen their QI culture...
ELIGIBILITY CRITERIA

- Proposals will be accepted from accredited governmental public health departments only.
- The QI Leader must be available for all training sessions; health department team members must be available for the local Kaizen event, the organization leadership team must be available for the annual QI planning session, and team members must be available for the projects defined in the annual QI plan.
- The QI Leader’s Academy program will not support proposals that seek to:
  - Create a performance management system for the health department.
  - Limit their involvement to only the training phase of the program.
  - Evaluate a public health program.
  - Improve clinical or individual care programs, services, or activities.

Health departments that participated in the COPPHI Kaizen Event program are not eligible to submit a proposal since they have already completed the training. They will be invited to join the Program initially to share their prior Kaizen learning and then participate actively during the annual QI planning education and application phase.

CONDITIONS OF PARTICIPATION

- Health Department Leadership
  - Designate a QI Leader consistent with the intent of this program; support them in the role on a continuing basis
  - Commit resources and logistics for a local Kaizen event (typically 5 consecutive days); Commit to implement the improved process.
  - Commit resources and logistics for creating/modifying/improving an annual QI plan (typically 2 days); Commit to implement the annual QI plan with the support of the health department leadership team and health department support resources.
  - Commit resources in support of individual contributor (health department team member) training.
  - Provide updates on the results of the work performed in this process in their accredited health department annual report.

- QI Leaders participate in the following:
  - Foundational QI and Kaizen training
  - Co-Lead a Kaizen event in your health department with a QI Coach
  - Annual QI planning process training
  - Co-lead the annual QI planning process with a QI Coach
  - Train the Trainer session for individual contributors (health department team members) and co-lead training session
  - Actively participate in the COPPHI QI Leader Program learning community including an interim community meeting and a one day wrap up meeting to share project results and learning with fellow award recipients
  - With the assistance of the QI Coaches, document and submit the results of the Kaizen event for submission to the Public Health Quality Improvement Exchange (PHQIX).
PROGRAM PARTICIPATION SELECTION AND BENEFITS TO THE HEALTH DEPARTMENT

PHAB will select 12 accredited health departments to participate in the QI Leaders Academy and to receive the following resources accordingly:

- **Training**
  - A total of 52 hours of QI foundational and Kaizen event training for the designated QI Leader (including goal setting, value and waste identification, working with others skills, gathering practical knowledge, measurement, process mapping, cause and effect analysis, data collection and testing, capturing lessons learned, process installation, change management, team facilitation, overview of improvement concepts and methods that can be used during the event, and the process of conducting a Kaizen event). Training will be provided via 3 in-person sessions at the PHAB offices in Alexandria, VA. Anticipated time frames for the trainings will be April 2015; May 2015 and September 2015.
  - A total of 32 hours of annual QI planning training for the designated QI Leader (including the annual planning process, inputs, analysis, prioritization and creation of a comprehensive plan including measures; cascading plans into projects; plan execution; organization change management). Training will be provided via one in-person session at the PHAB offices in Alexandria, VA.
  - A total of 16 hours of Train the Trainer for the designated QI Leader to enable them to deliver a foundational skills course for individual contributors. Training will be provided at site and include delivery of the course for individual contributors.

- **Coaching**
  - A designated QI Coach with expertise in foundational and advanced QI methods including kaizen, conducting kaizen events, QI planning, and coaching others.
  - Onsite QI coaching support to co-lead a kaizen event at the health department (usually 5 consecutive days) together with the QI Leader.
  - Additional QI coaching that covers kaizen event preparation, installation of the results, reporting, and change management.
  - Upon completion of the onsite event, QI coaching for each health department to submit with intent to publish their QI project to the Public Health Quality Improvement Exchange (PHQIX).
  - Onsite QI coaching to co-lead the creation, modification or improvement of the annual QI plan and the cascading of the plan into improvement projects.
  - Onsite coaching in delivery of the QI foundational course to individual contributors.

- **Access to a learning community for the 22 QI Leaders (including 10 from the COPPHI Kaizen program)** including a share site for materials, information and questions, regular community calls and individual support.

- **Materials**
- Kaizen event support kit (e.g., wall charts, post its markers, label maker, laminator, flash drive with kaizen materials)
- Annual QI planning support materials
- > 40 QI and Change Management methods and techniques (on the share site)

- Travel, lodging, and per diem for one person (QI Leader) from the health department to attend three in-person training sessions over the course of approximately 12-14 months.

**PROPOSAL SUBMISSION (See Appendix C for Definitions and Descriptions.)**

A range of accredited health department proposals are sought for the QI Leaders Academy, including state or local health departments of varying sizes, geographic location, and populations served. Accredited health departments with various levels of experience related to QI are also encouraged to apply. The length of time that a health department has been accredited is not a limiting factor. As a minimum, health departments should have completed the following:

- Demonstrated QI commitment by organization leaders communicating the QI strategy to all employees and providing QI resources
- QI Leader has participated in at least one basic QI training that included QI concepts, the improvement process (e.g., plan-do-study-act), and QI techniques (e.g., fishbone diagram)
- QI Leader has participated in at least one QI project.

Applicants will need to submit the following:

- A brief proposal, no longer than 5 single-spaced pages using the proposal template provided in Attachment B by **5:00 pm, edt, on Monday, February 9, 2015** to the PHAB website **QILeadersAcademyProposal@phaboard.org**. Hard copies, incomplete proposals or proposals submitted after the deadline will not be accepted.

- A Letter of Support (LOS) signed by the health department director reflecting support for the health department’s participation, team member’s time for the Kaizen event, leadership’s time for the annual planning session and commitment to fulfill the program requirements. (See Appendix B.)

- Copy of the health department’s current annual QI plan.

- Copy of documentation of a completed QI project with the QI Leader as a participant.

In the proposal document, health departments will need to propose a specific QI project targeted toward improving a process or outcome that:

- Has a clear aim/improvement goal statement AND
- Is applicable to the Kaizen event methodology (e.g., that the process is observable within the first two days of the five day event timeframe and is feasible to test and install solutions within the 5-day event timeframe) AND
• The organization is willing to commit the necessary resources (people, time) and logistics moving forward.

See Appendix A for a sample Kaizen project proposal.

TELECONFERENCE FOR POTENTIAL APPLICANTS

Questions about this RFP will be answered during an optional teleconference, to be held from 4:00-5:00 pm, edt, on January 21, 2015. The dial-in information for the conference is 888-537-7715, code 54303228#. The teleconference will include a review of the objectives of this program, describe this solicitation and describe the requirements for proposals. Participation in the web conference call is strongly encouraged, but not required.

An initial set of Frequently Asked Questions (FAQ) is provided in Appendix D. Questions and Answers from the teleconference will also be developed and posted on the PHAB password protected accredited health department website.

KEY DATES AND DEADLINES

• January 13, 2015—Release of Request for Proposals (RFP)
• January 21, 2015, 4-5 pm, edt—Informational teleconference
• February 9, 2015, 5 pm, edt—Deadline for receipt of full electronic proposal to PHAB website
• End of February/Early March 2015—Telephone calls with finalists prior to selection
• Second Week in March 2015—Sites notified of selection status

SELECTION CRITERIA

Proposals will be reviewed by a panel including: PHAB staff, Continual Impact staff and RWJF staff, who will provide recommendations to PHAB. PHAB will ultimately select all participants. Health Departments will be selected based on the following considerations and evidence:

Rationale for Health Department Participation

• The health department provides sound rationale for their participation in the QI Leaders Academy, including their internal goals for same.
• The health department provides sound rationale for why the review team should choose them for participation.

Proposed Kaizen QI Project

• The QI project addresses processes that affect population health issues or public health administrative functions, rather than clinical services, which tend to be focused on patient care. Projects can address a variety of process improvement needs in the above areas such as cycle time reduction, capacity increases (e.g., more work accomplished with the same resources), and increase in customer satisfaction.
The proposed QI project is part of the organization’s strategic and/or QI plan.

The proposed project is appropriate for the Kaizen event methodology as outlined in this RFP and in the Frequently Asked Questions (FAQs) located in Appendix D.

The potential benefits and the stakeholders who will be impacted by the proposed QI project are clearly articulated.

The QI project has the potential to achieve a significant and measurable improvement to the process’s outcome.

The aim/improvement goal statement and scope proposed for the project is clear and does not consist of simply implementing preconceived solutions/actions. (See example aim/ improvement goal statement in Appendix A).

The proposed QI project has data available for measuring and evaluating the change in performance or outcomes.

The project’s current work process cycle time (overall time to complete the process) is observable in the first two days of the five day event timeframe. See the FAQs for more information.

Resource Commitment

- Leadership is committed to select an improvement team with the authority to make decisions in the improvement area and commit key members for the duration of the 5 day onsite kaizen event.
- Leadership is committed to identify and commit a QI Leader to the project who has a demonstrated experience in QI, interest in learning more and improving their QI knowledge and skills, and who will lead or be called upon to apply the knowledge and skills to future QI planning and projects. QI Leader has participated in at least basic QI training that included QI concepts, the improvement process (e.g., plan-do-study-act), and QI techniques (e.g., fishbone diagram).
- Leadership is committed to providing the dedicated time of the leadership team for the purposes of modifying or improving an existing annual QI plan or creating a new one.
- Leadership is committed to providing the annual QI plan project resources and time for planning and applying QI methods to select projects in order to achieve the goals of the QI plan.
- Leadership is committed to individuals participating in the 4 hour QI for Individual Contributors courses provided by the QI Leader and Coach (10-20 individuals per class, 3-4 classes).

Finalist Review Call

As part of the selection process, finalists will be requested to participate in a review call prior to receiving a notice of selection. The call will be conducted with the finalist departments [health department’s leader (or highest ranking official) and QI Leader] and members of the review panel in order to explore the proposed project, the match between the QI Leader and Program goals, and the commitment of resources.

**REQUIREMENTS FOR SELECTED HEALTH DEPARTMENTS**
Once selected, in order to be successful in the PHAB QI Leaders Academy selected health departments will be required to perform the following:

**Health Department Leadership**
- Designate a QI Leader (e.g., QI/Performance Manager or Coordinator) for the program’s duration including the training and co-leading of the kaizen event and planning session.
- Commit resources (staff) and logistics (space) for the Kaizen event (5 consecutive days) and planning session.
- Commit to implement the improved process and QI plan.

**QI Leader**
Participate in the following:
- Three (3) training events to be held at the PHAB Offices in Alexandria, VA.
- Co-Lead a Kaizen event in your health department with the support of a QI Coach (including event preparations, conducting the event, implementing solutions, capturing lessons learned, measuring results, communicating, and celebrating successes) in the late spring/summer 2015.
- Co-lead an annual QI planning session to modify or improving an existing annual QI plan
- Co-lead initial foundational QI training session for select members of the health department QI team/staff
- With the assistance of the QI Coach, document and submit the results of the QI project for submission to the Public Health Quality Improvement Exchange (PHQIX).
- Provide a summary that documents the improvements gained and lessons learned from the implementation of the PHAB QI Leaders Academy in the health department’s next annual report to PHAB.
- Be an active participant in the QI Leaders Academy learning community over the duration of the program.

**Health Department Team Members/Individual Contributors**
- 4-10 Work process Kaizen event team members actively work together to achieve the goal of the Kaizen event. As an outcome of the annual QI plan, approximately 4 project teams created using QI methods to achieve and sustain each project’s goals and working together to achieve the annual organizational QI goals
- Staff members participate in the QI for Individual Contributor education. (Two initial classes will be co-led with the QI Leader for 20-40 members total. Additional staff will be trained by the QI Leader.)
APPENDIX A
KAIZEN EVENT PROJECT DESCRIPTION EXAMPLE

Project Selection and Impact

- Why was this project selected (Why is the project important to the health department?)?
  - What data was used to identify why this is important?
- How is the project part of the health department’s strategic plan and/or QI plan? If the plan did not include the potential project, please indicate why it is being targeted.
- Who will the QI project impact? Is the project within one programmatic area, in several programmatic areas or across the health department or several health departments? Roughly how many people will be impacted by this QI project?

Example description of why the project was selected and what it is important:
Food service inspections are a part of our health department responsibilities. These inspections help to reduce the occurrence of food borne illness in the population by identifying deficiencies in food handling processes and procedures. Having a process that effectively identifies the issues, achieves compliance, and is done on a timely basis is key to protecting public health.

As part of assessing our performance measures this year during QI planning, we observed an increase in the number of food borne illnesses. Upon further investigation, we have determined that we are falling behind the scheduled food inspections at the food establishments in our jurisdiction. [Describe the data that was used to identify this finding here.] We are also concerned that the quality of the inspections may not be consistent and we are not spending enough time preventing recurring violations. [Describe the data that was used to identify this finding here.]

What we desire with this project is to reduce the time of inspection and create consistent quality of all inspectors so that we are compliant to schedule, spend more time on preventative actions and ultimately decrease illnesses.

[Describe how the QI project is part of the health department’s strategic plan and/or QI plan here.]

Example description of who the QI project will impact:
This QI project will impact our jurisdiction which includes 100 food establishment sites that have 5 inspections completed per month. The QI project will impact our food inspection program within our health department. Our jurisdiction population size is 20,000 residents.

Aim/ Improvement Goal (corresponds with online application question)
Please provide your preliminary aim statement that articulates the goal of the kaizen event project in terms of the measurable improvement sought. For guidance on writing aim statements, applicants may use the following framework:

What are we trying to accomplish?
To: What is the specific goal, purpose or outcome desired?
For: Who benefits from the results?
So That: What are the benefits from achieving the goal?
Conditions: What requirements or limitations exist?

How will we know there is/are improvement/s?

Standards: What will be the measures of success? (What are you measuring, how will it be measured and what is the target?) Your project may include additional measures or sub-measures to measure the success within your project. If this is the case, please describe the additional measures or sub-measures as well.

Example Aim/ Improvement Goal:

To: Reduce the time to complete food service establishment inspections.

For:
- People consuming food at the food establishments in our jurisdiction
- Our inspectors

So that:
- More inspections are compliant with the required inspection frequency.
- More time can be spent on preventing recurring violations (proactive actions vs. reactive actions)
- More people are prevented from contracting food borne illnesses

Conditions:
- Inspection quality is not compromised. (We expect to actually increase the consistency of inspections.)
- Adhere to the required inspection frequency and to local laws.
- Targets achieved within one month of kaizen event completion.

Standards:
There are two measures our team will utilize. The first is the average inspection time per visit. It will be measured by the time it takes from beginning the inspection to the return to the office divided by the number of inspection visits. Our target is to decrease time from baseline by 30%. The second measure is the number of delinquent inspections which will be measured by the number of delinquent inspections. Our target is to reduce the number of delinquent inspections from baseline to zero. Both of these measures should reduce the time to complete food service inspections.

Example response:
Work Process Data and Information (corresponds with online application question)
Provide descriptions of the following:
- The process starting and end points
  - Start: Inspector receives schedule
  - End: Reports completed for scheduled visits
- Who performs the process?
  - Supervisor, Inspectors
What is the current process cycle time (overall time to complete the process from start to end)?
  - Average Inspection time per visit = 3 hours
  - 2 hours per inspection (Small establishment) (to be confirmed)
  - 5 hours per inspection (Large establishment) (to be confirmed)

What is the work content time (amount of actual work hours to perform the process)?
  - 1 hour per inspection (small establishment) (to be confirmed)
  - 3 hours per inspection (large establishment) (to be confirmed)

What is currently being measured in the target work process? If no measures exist what data exists about the process (e.g., frequency, duration, time, defects)?
  - # of inspections done per day
  - # of food establishments serviced
  - Inspection schedule

Team Members
Provide who will be involved in the QI Leaders Academy Kaizen Event.

*Example response:*
Team members will include four staff members as follows:
  - The inspector, Jane Doe, represents the inspection process (receipt of daily schedule, inspections, return to the office and reporting).
  - The Supervisor of the Inspectors represents the scheduling of inspections, policies, process owner, and measurement.
  - The QI Leader who is also [title within health department], will lead and coordinate the kaizen process.
  - The Food Establishment Owner (as needed) for a small and a large food establishment represents the food establishment perspective.
  - We will get the input from other inspectors throughout the event.
APPENDIX B
SAMPLE LETTER OF SUPPORT

On letterhead of health department

Name of director of the health department
Name of health department
Address of health department

To the Public Health Accreditation Board:
As the (insert title), I fully support the name of health department applying for the QI Leaders Academy Program. I have demonstrated commitment to quality improvement through
(Replace this with what you have done to demonstrate these 4 items)
• communicating the QI strategy to all employees and providing QI resources
• developing and implementing our annual QI plan goals and activities
• the QI Leader has participated in at least basic QI training that included QI concepts, the improvement process (plan-do-study-act), and QI techniques (e.g. fishbone diagram)
• the QI Leader has participated in at least one QI project

If selected for the QI Leaders Academy Program, I understand my health department and staff will be responsible for the following:

Health Department Leadership
• Designate a QI Leader (e.g., QI/Performance Manager or Coordinator) for the program’s duration including the training and co-leading of the kaizen event and annual QI planning session.
• Commit resources (staff) and logistics (space) for the kaizen event (5 consecutive days) and annual QI planning session.
• Commit to implement the improvement projects developed within the annual QI plan session (2 consecutive days).

QI Leader
Participate in the following:
• Three (3) training events to be held at the PHAB Offices in Alexandria, VA.
• Co-Lead a kaizen event in your health department with the support of a QI Coach (including event preparations, conducting the event, implementing solutions, capturing lessons learned, measuring results, communicating, and celebrating successes).
• Co-lead an annual QI planning session to create, review or improve the organization QI plan; monitor, facilitate, and support the QI projects developed within the annual QI plan.
• Co-lead initial foundational QI training session for individual contributors; train additional individual contributors in the organization, as required.
• With the assistance of the QI Coach, document and submit the results of the QI project for submission to the Public Health Quality Improvement Exchange (PHQIX).
• Provide a summary that documents the improvements gained and lessons learned from the implementation of the PHAB QI Leaders Academy in the health department’s next annual report to PHAB.
• Be an active participant in the QI Leaders Academy learning community over the duration of the program.

Individual Contributors
• 4-10 Work process Kaizen event team members actively work together to achieve the goal of the Kaizen event.
• As an outcome of the annual QI plan, approximately 4 project teams created will use methods to achieve and sustain each project’s goals and working together to achieve the annual organizational QI goals.
• Staff members participate in the QI for Individual Contributor education. (Two initial classes will be co-led with the QI Leader for 20-40 members total. Additional staff will be trained by the QI Leader.)

Sincerely,

Name of director of the health department
Title of director
Name of health department
APPENDIX C

ASSOCIATED DEFINITIONS AND DESCRIPTIONS

QI in public health is defined as “the use of a deliberate and defined improvement process which is focused on activities that are responsive to community needs and improving population health. It refers to a continuous and ongoing effort to achieve measurable improvements in the efficiency, effectiveness, performance, accountability, outcomes, and other indicators of quality in services or processes which achieve equity and improve the health of the community.”

The Kaizen event methodology can be utilized to achieve rapid improvements in work processes. Kaizen is simply a term that means “change for the better”. A Kaizen event is a team based approach that enables improvement to be made by stepping through all phases of the quality improvement cycle in an effective and rapid fashion. The Kaizen approach enables organizations to realize benefits greater than expected and within a much shorter timeframe. Following a preparation phase, a typical Kaizen event targets the elimination of waste in a work process improvement project by using a concentrated and systematic approach including understanding and analyzing the problem, testing solutions, learning, and installing improvements in a brief period of time, typically 5 consecutive days, with full benefits achieved within 1-3 months. Done well, Kaizen events help the organization solve problems in rapid fashion while energizing and engaging the workforce. Typical Kaizen events could include applications such as a) improving immunization process to reduce missed opportunities to immunize, b) increasing the amount and quality of restaurant inspections with fixed resources, or c) improving the request for proposals submittal process for speed and increased acceptation rate.

For the purpose of this program, QI Leaders are those staff who play a role in advancing QI in the health department. QI Leaders typically demonstrate a passion for QI, want to learn new skills and apply them, and see people as critical to organizational success.

The leadership team refers to the leaders in the health department responsible for developing and resourcing the annual QI plan, and providing the on-going structure and support to achieve the annual QI plan’s goals.

The Process Owner refers to the individual with accountability to work with the process team members to ensure the improvements are incorporated, goals achieved and additional improvements made in the future.

The PHAB QI Leaders Academy is a learning and sharing community of practice whose activities and benefits include the following:

- Achieve a measureable benefit in public health work processes

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- Demonstrate an approach (Kaizen) that the organization can use in the future for additional QI projects/events
- Provide an understanding of what projects would be appropriate for application of the Kaizen methodology
- Demonstrate that QI can achieve rapid change to improve results
- Build knowledge and skills in a QI Leader that enable their personal QI growth, improve their ability to support the organization, enable them to educate others in foundational skills, and allot them to learn from other QI Leaders and their experiences
- Provide leadership teams within health departments the opportunity to create, update, revise, and improve their QI plan (at both the department and project level); provide an approach and template for future plan creation.
- Assist the health department to improve their overall performance in the area of QI, as required by accreditation standards and measures set by the Public Health Accreditation Board (PHAB)

For the purpose of this program, the goal for the selected QI project is to create improvements to processes, outputs, and outcomes related to public or population health, or health department administrative functions. Additionally, the project should fit with Kaizen event methodology. Typically this means that the QI project will focus on a **work process improvement** that:

- **Is observable** within the first two days of the five day Kaizen event. This means:
  - The work process can be physically watched/walked in two days’ time, **OR**
  - The work process staff members can be interviewed and process data collected, all within two days or less

- **Is feasible to test and install solutions** within the Kaizen event timeframe (5 days)
APPENDIX D

FREQUENTLY ASKED QUESTIONS

How do I submit my proposal?
Once you have completed all sections of the submission, including the letter of support and your QI plan, email the packet to QILeadersAcademyProposal@phaboard.org.

What is the proposal deadline?
The deadline is 5:00 pm, edt, on February 9, 2015. Incomplete, late, or hard copies of the proposals will not be accepted.

Whom do I contact if I have questions about the proposal?
Questions about this RFP will be answered during an optional teleconference, to be held from 4:00-5:00 pm, edt, on January 21, 2015. The dial-in information for the conference is 888-537-7715, code 54303228#. The teleconference will include a review of the objectives of this program, describe this solicitation and describe the requirements for proposals. Participation in the web conference call is strongly encouraged, but not required.

Thereafter, questions may be routed to Kaye Bender, kbender@phaboard.org, phone 703-778-4549, ext 103.

Do I need to submit a budget?
No. No direct funds are provided as part of the program therefore health departments do not need to submit a budget as part of this proposal.

Will selected health departments receive monetary funding for their participation in the program?
No. The selected sites will not receive any monetary funding. Participants receive the benefits outlined in the RFP. (These include three training sessions and a close out session for the QI Leader with air travel and lodging compensated, expert QI coaching at distance and onsite, materials (both physical, e.g. Kaizen facilitator kit, wall charts and electronic) to conduct the onsite Kaizen event and annual QI planning session, and refreshments and meals for the team members participating in the onsite Kaizen event.)

Who is eligible to apply for this program?

- Proposals will be accepted from PHAB accredited governmental public health departments only.
- The QI Leader must be available for all training sessions; health department team members must be available for the local Kaizen event, the organization leadership team must be available for the annual QI planning session, and team members must be available for the projects defined in the annual QI plan.
- The QI Leaders Academy program will not support proposals that seek to:
Create a performance management system for the health department.
  - Limit their involvement to the training phase of the program only.
  - Evaluate a public health program.
  - Improve clinical or individual care programs, services, or activities.

Health departments (both accredited and not yet accredited) that participated in the COPPHI Kaizen Event program are not eligible to submit a proposal since they have already completed the Kaizen training. They will be invited to join the QI Leaders community of practice to share their prior Kaizen learning and then participate actively during the annual QI planning education and application phase.

**Does PHAB have a recommendation about whether our health department could use this training? Did PHAB single out health departments to be invited to submit a proposal?**
No health department has been singled out or identified as particularly in need of this training. This is an opportunity for all accredited health departments to see as an added benefit of being accredited. We encourage all accredited health departments to seriously consider applying to be part of the Quality Improvement Leaders Academy, although we will only be able to select twelve (12).

**May a health department submit more than one proposal?**
No. A health department cannot submit more than one proposal.

**What happens after our health department submits a proposal?**
All proposals that are submitted by the deadline go through a review process with a panel of reviewers including staff from PHAB, Continual Impact, and RWJF. If your proposal is selected based on the requirements described in the RFP, you will be notified to schedule a review call. The scheduled call will be conducted with the organization finalists (Health Department’s Leader and the QI Leader) and members of the review panel in order to explore the proposal. Health departments with proposals not selected for the program will also be informed of their status. All health departments will be notified of their final proposal status during the first two weeks in March 2015.

**If our health department is selected to participate in the program, can our health departments select our own QI Coach?**
The QI Coaches have been identified by PHAB and RWJF. The QI Coaches have expertise in foundational and advanced QI methods including Kaizen, conducting Kaizen events, Annual QI planning, training, and coaching health departments in various settings.

**Will our health department receive specific comments on my proposal after a decision is made?**
No. Clarification of the proposals will be handled in the conference calls, and no further feedback will be needed.

**What is the time period (start/end dates and duration) for the QI Leaders Academy program?**
- January 13, 2015—Release of Request for Proposals (RFP)
- January 21, 2015, 4-5 pm, edt—Informational teleconference
- February 9, 2015, 5 pm, edt—Deadline for receipt of full electronic proposal to PHAB website
- End of February/Early March 2015—Telephone calls with finalists prior to selection
- Second Week in March 2015—Sites notified of selection status
- Tentative Training Dates will be scheduled in April 2015 (Tuesday-Thursday) – Kaizen and Foundational QI Education; May 2015 (Tuesday-Friday) – Kaizen and Change Management Education; and September 2015 (Tuesday-Friday) – Annual QI Planning Education.
- May – August 2015 – 12 Kaizen Events, one per selected site
- October 2015 – February 2016 – 22 Annual QI Planning Sessions and QI for Individual Contributor education
- March 2016 – Program Close out

If selected, can the health departments send another QI Leader from our health department?
The program will provide travel support and per diem for the QI Leader. Health departments may choose to send up to one additional staff member at their own expense.

Can you provide an example of an appropriate Aim / Goal statement for a Kaizen event?
Yes, in the RFP, Appendix A provides part of a sample proposal submission with an example goal statement.

Do we really need five consecutive days for a Kaizen event?
Ideally the Kaizen event is five consecutive days. An event can be split into segments (e.g., only mornings, or a few full days), however it should be completed within three weeks. For this program, projects should be able to commit team resources for five consecutive days.

Who should participate in the Kaizen event?
Kaizen event team members should represent the process areas that are affected by the project, have a strong understanding of the current process, have the authority to make decisions (management, members with delegated decision making authority, fast access to decision makers), have the credibility and respect of the area they are representing. The entire team should also represent a diversity of perspectives, including the process customer, supplier and consider inclusion of a department member who is relatively unfamiliar with the process (“wild card”).

Do all Kaizen event team members need to participate for all days of the event?
Yes, the core team members need to participate in the entire event. However, if an individual is only needed for one particular task or information as part of the Kaizen event, they do not need to be there for the entire event.

What does co-leading a Kaizen event, Annual QI planning, and QI for Individual Contributor education entail?
The QI Leader and the QI Coach will lead the sessions together. The task and methods will be
shared in order for the QI Leader to learn by doing. The QI Coach will provide coaching and feedback and will lead when needed. Summary feedback will be provided to each QI Leader on completion of the application.

If we have previously received Foundational QI, Kaizen, or Annual QI planning training do we need to attend the training?
Yes. The training will allow those less exposed to QI to learn and allow those previously exposed to deepen and broaden their skills. The training will also provide a consistency of methodology to enable better collaboration in the learning community.

Can the health department have one individual attend training and co-lead application for the Kaizen event and a different individual attend training and co-lead the annual QI Plan creation/revision?
No. The curriculum is designed as additive, i.e. the foundational, Kaizen and change management skills are seen as prerequisites to the knowledge and skills for annual QI planning.

What is the QI for Individual Contributors education?
A four hour education course where participants will develop basic continual improvement knowledge and skills using the Tell/Show/Do/Recycle learning approach. Participants will learn several improvement methods followed by immediate application on their own work problem, in the classroom setting. They will learn and apply the improvement cycle phases of establishing goals and measures; using data, identifying waste & value in the current activities; performing cause and effect analysis to determine the root of the problems and identify solutions; testing and installing solutions.