CHANGE PACKAGE TEMPLATE

About The Canadian Foundation for Healthcare Improvement

CFHI works shoulder-to-shoulder with partners to accelerate the identification, spread and scale of proven healthcare innovations. Together, we are delivering lasting improvement in patient experience, work life of healthcare providers, value for money and the health of everyone in Canada.

CFHI is recognized as a leader in patient, family and caregiver engagement. Since 2010, we have led collaboratives and championed partnerships with patients and families to improve quality across the continuum of care.

Canadian Foundation for Healthcare Improvement
150 Kent Street, Suite 200
Ottawa, ON K1P 0E4

General Enquiries: info@cfhi-fcass.ca | 1-613-728-2238

CHANGE PACKAGE TEMPLATE

What is a Change Package?

A Change Package is a toolkit of information that can inform the planning, implementation and evaluation of a healthcare improvement initiative that aims to create lasting benefits to patient, family and/or caregiver experience, health and/or work life of providers.

How to Use this Change Package Template to Spread Improvement

If you have an improvement you want to spread to another site, complete this Change Package Template to describe the improvement initiative in existing sites. Then, share the completed Change Package with the site(s) that want to implement the initiative. If possible, provide this site(s) with coaching opportunities to help them learn from your experience and adapt to their context.

How to Use this Change Package Template to Implement Improvement

If you want to implement an improvement initiative from another site, meet with the sites who successfully implemented the improvement initiative you want to adopt and ask them to complete this Change Package Template with you. Review the completed Change Package with your team to create the implementation plan. If possible, secure coaching opportunities with the site(s) who have already implemented the improvement to help you learn from their experience.

These are the key components of a comprehensive Change Package:

1. **Description of the Improvement Initiative and How It Works**. This includes how the improvement has involved partnership with patients, families and care partners.
2. **Evaluation and Equitable Impact**. This includes the family of measures that have or will be used to demonstrate how the improvement initiative can equitably benefit patients, families, care partners, and/or providers.
3. **Lessons Learned**. This includes the strategies, challenges and solutions learned from the implementation of the improvement initiative elsewhere.
4. **Planning for Sustainability & Long-Term Success**. This includes strategies to embed the improvement initiative into existing processes to support sustainability and long-term success.

1 DESCRIPTION OF THE IMPROVEMENT INITIATIVE AND HOW IT WORKS

Questions to Consider:

1. What is/are the primary aim(s) of the improvement initiative (i.e. what gap in care or support does it address)?

2. What are the skills, expertise and human resource requirements needed to implement, manage and evaluate the improvement initiative?

3. How has the improvement initiative involved partnership with different disciplines and care partners, including patients, families and caregiver partners with lived experience?

Complete **Table 1**.

Table 1: About the improvement initiative: Fundamental and Adaptable Elements; Resources and Practical Tools; and Infrastructure Requirements

Fundamental elements of the improvement initiative that should not **be modified:**	
1	
2	
3	
4	
Adaptable principles of the improvement initiative that can **be modified:**	
1	
2	
3	
4	
Resources and practical tools that exist to support implementation (including links if applicable):	
1	
2	
3	
4	
Infrastructure requirements:	
1	
2	
3	
4	

2   EVALUATION AND EQUITABLE IMPACT

Measurement is an essential part of improvement. Measurement informs needed adjustments and provides evidence that supports the case for change, increases engagement and excitement among those involved.

Using **Table 2** below, identify a family of measures you will track to monitor your progress toward your aim(s). Determine your measures in partnership with people who will be impacted by the change, including patient, family and caregiver partners and staff. It will be important to include measures to assess the impact of the improvement initiative across diverse population groups, including populations who struggle to access care generally (e.g., live in rural or remote areas), potentially at-risk or vulnerable populations (e.g., complex medical needs); First Nations, Inuit and Metis communities; immigrants; refugees; LGBTQ2+; Black Canadians; or other minority groups. CFHI's Improvement Resources including the Healthcare Improvement Planner and the Measurement for Improvement Resource and Planning Template can be used to help create detailed improvement and measurement plans.

1. List the **outcome measure(s)** you ultimately want to improve.
2. List **process measure(s)** i.e., the activities you are doing to achieve your desired outcomes/aims. Process measures can include, for example, number of staff and patient, family and caregiver partners who receive education to support the initiative.
3. List the **balancing measure(s)** to monitor possible unintended consequences or problems.
4. For each of your measures, identify:
   a. The **data collection method**, which includes identifying the data source, frequency of collection and who is responsible to collect, track and report the data over time.
   b. **Baseline data** (if available), to identify the current information on the measures you will use to monitor progress toward your improvement aims; this will allow you to detect changes in the measures over time.
   c. **Target/expected change** of the measures with a specified time period for your targets/expected changes.

Table 2: Measurement Plan

Measure Name & Operational Definition	Data Collection Method: Frequency and Sources	Target/Expected Change (specify time period)
Outcome Measures: Main outcomes to improve.		
1		
2		
3		
Process Measures: The activities you are doing to achieve your desired outcomes/aims. *(Ex. number of staff who received education or training)*		
1		
2		
3		
Balancing Measures: Assess for unintended consequences; should either not change or stay the same. (*Ex. number of falls when reducing medications)*		
1		
2		
3		
4		

Questions to consider:

1. Have possible unintended consequences on safety, cost, effectiveness, equity or care experience been assessed? Describe the process for these assessments and any results and lessons learned.

2. What is the infrastructure and processes needed to collect, analyze and use data to evaluate the impact of the improvement initiative?

3. With reference to the measures identified in Table 2, describe the results achieved and the length of time the lasting, equitable improvement in patient, family, and/or caregiver experience, health, and/or work life of providers have been sustained in other site(s).

4. The goals of the improvement initiative should reflect what is important to people who will benefit from the outcomes of the initiative. What strategies have or can be used to successfully partner with people who will be impacted by the outcomes of the improvement initiative to design the family of measures and inform ongoing evaluation and monitoring?

Here are some resources you may find helpful to help design a measurement plan for a healthcare improvement initiative:

- CFHI's Healthcare Improvement Planner and Long Term Success and Sustainability of Healthcare Improvement Guide
- Institute for Healthcare Improvement: Establishing Measures, Sample Measures, Quality Improvement Project Measures Worksheet
- Health Quality Ontario: Measurement for Quality Improvement

3 LESSONS LEARNED

Complete the table below to identify possible implementation strategies, challenges and solutions, based on learnings from site(s) that have already implemented it.

Implementation strategies

Challenges	Solutions

4   PLANNING FOR SUSTAINABILITY & LONG-TERM SUCCESS

Planning for sustainability is important during all phases of an improvement initiative – including in the planning and early implementation phases. Activities that can support sustainability and long-term success include:

- Standardizing and embedding foundational elements of the new or improved practice into existing practices
- Creating new standard processes
- Setting new expectations and support structures for staff, patients, families and care partners.

This can include creating easy to use and accessible checklists, policies and clinical guidelines, and building 'new ways of doing things' into employee orientation, job descriptions, policies and process.

Long-term success and sustainability have been achieved when:

- New ways of working and improved outcomes have become the norm
- Work culture has shifted so the change is part of daily practice, rather than a new, "add-on"
- Gains from the improvement initiative are maintained without reverting to previous ways of doing things; and with the initiative continuing to evolve
- Many people continue to benefit from the improvement

Example Sustainability Goals for a Healthcare Improvement Initiative	
☐ Maintain and strengthen partnerships and/or develop new partnerships.	☐ Improve working relationships with partner organizations, patients, families and caregiver partners and other stakeholders.
☐ Ensure initiative activities continue as common practice and reach more people.	☐ Maintain continued benefits for patients, families and others with lived experience.
☐ Engage staff and people with personal experience as key advisors for the improvement initiative (e.g. help to identify key issues and important improvement outcomes from their perspectives).	☐ Share ongoing experiences for continuous improvement and adaptation of sustainability plans (e.g. updates at staff meetings and visual displays).
☐ Improve efficiency (e.g. makes jobs easier; fully embed the new practice into everyday practice so it's no longer perceived as a "new" initiative).	☐ Spread and embed the improvement in new contexts through continued adaptation.
☐ Continue or increase the awareness of the problem or issue.	☐ Gain further funds to continue the initiative and maintain improvements.
☐ Spread the initiative to reach and benefit more people.	☐ Maintain and strengthen new practices, procedures and/or policies.
☐ Expand skills.	☐ Engage leadership.
☐ Other (specify):	☐ Other (specify):

What strategies have been (or can be) used to promote long term success and sustainability of the improvement initiative?

Strategy	Description

What strategies can be used to ensure the improvement initiative (i.e., the improved or new practice) is reviewed and adapted over time, as needed?

Strategy	Description

CFHI's Healthcare Improvement Planner the Long-Term Success Tool and Action Planner provides detailed information and reflection questions related to the goals listed in the checklist and can be used to create detailed sustainability plans, after you have achieved evidence of successful improvement. In addition, CFHI's Long Term Success and Sustainability of Healthcare Improvement Guide provides tips for promoting long-term success and sustainability that can help inform discussion and planning efforts.