**ADMINISTERING THE NACCHO QI SELF-ASSESSMENT TOOL: GROUP FACILIATION**

***Sample Agenda***

*Facilitator Instructions: This sample agenda assumes assessment of all 20 sub-elements of the NACCHO QI SAT, allotting 20 minutes per sub-element. Tailor the agenda based on the version of the SAT being used and the agency’s assessment and scoring process.*

**OBJECTIVES**

* Orient assessment respondents to the NACCHO QI SAT
* Develop shared understanding of agency’s current state of QI across the six foundational elements
* Submit ratings for diagnostic statements in the NACCHO QI SAT
* Reach consensus on agency scores across six foundational elements

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| **Agenda Item** | **Description** | **Time** |
| **INTRODUCTION & OVERVIEW*****(Total Time: 25 mins)*** |
| **Overview of QI vision**  | * Agency vision for QI
* Current state of QI
 | **10 mins** |
| **Overview of Self-Assessment Process** | * Steps in assessment process
* Overview of the SAT
* Scoring methods
* Participant expectations
* Ground rules
 | **15 mins** |
| **ASSESSMENT & SCORING*****(Total Time: ~6.5 hours)***For Sub-Element, the following objectives will be met: * Provide an overview of the sub-element
* Participants discuss agency’s current status of that sub-element
* Participants score the sub-elements
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| **Foundational Element 1: Employee Empowerment 40 mins** |
| **Sub-Element 1.1: Enabling Performance**  | * Assessment of how well agency enables employees to use QI and achieve high performance
 | **20 mins** |
| **Sub-Element 1.2: Knowledge, Skills and Abilities (KSAs)** | * Assessment of public health and QI knowledge, skills, and abilities
 | **20 mins** |
| **Foundational Element 2: Teamwork & Collaboration 40 mins** |
| **Sub-Element 2.1: Team Performance**  | * Assessment of how well agency teams function and perform
 | **20 mins** |
| **Sub-Element 2.2: Learning Communities**  | * Assessment of opportunities for learning and sharing the agency
 | **20 mins** |
| **Foundational Element 3: Leadership 40 mins** |
| **Sub-Element 3.1: Culture**  | * Assessment of the established environment to support a QI culture
 | **20 mins** |
| **Sub-Element 3.2: Resourcing & Structure** | * Assessment of resources and structure to support a QI culture
 | **20 mins** |
| **Foundational Element 4: Customer Focus 60 mins** |
| **Sub-Element 4.1: Understanding the Customer**  | * Assessment of how well the agency understands customer needs, values, and satisfaction
 | **20 mins** |
| **Sub-Element 4.2: Satisfying the Customer through the Value Stream** | * Assessment of how well the agency uses customer data to satisfy the customer through value streams
 | **20 mins** |
| **Sub-Element 4.3: Reprioritizing and Creating Programs and Services**  | * Assessment of process for reprioritizing and creating new programs and services to address customer needs
 | **20 mins** |
| **Foundational Element 5: Quality Improvement Infrastructure 80 mins** |
| **Sub-Element 5.1: Strategic Planning**  | * Assessment of the agency strategic planning process
 | **20 mins**  |
| **Sub-Element 5.2: Performance Measurement** | * Assessment of agency performance measurement process
 | **20 mins** |
| **Sub-Element 5.3: Annual QI Planning**  | * Assessment of agency QI planning process
 | **20 mins**  |
| **Sub-Element 5.4: Administrative and Functional Processes and Systems**  | * Assessment of how well agency administrative processes and systems support continuous improvement
 | **20 mins** |
| **Foundational Element 6: Continuous Process Improvement 120 mins** |
| **Sub-Element 6.1: Selecting & Applying Methods**  | * Assessment of agency capacity to select and apply appropriate QI methods
 | **20 mins** |
| **Sub-Element 6.2: Planning for Process Improvements**  | * Assessment of how well agency plans for improvements of QI projects
 | **20 mins** |
| **Sub-Element 6.3: Testing Potential Solutions**  | * Assessment of how well agency tests potential solutions and acts on results in QI projects
 | **20 mins** |
| **Sub-Element 6.4: Extracting Lessons Learned**  | * Assessment of how well agency identifies and applies lessons learned
 | **20 mins** |
| **Sub-Element 6.5: Sharing of Best Practices**  | * Assessment of agency use of best practices
 | **20 mins** |
| **Sub-Element 6.6: Effectively Installing Standardized Work**  | * Assessment of standardized work processes
 | **20 mins** |
| **Sub-Element 6.7: Process Management, Results, & Continual Improvement**  | * Assessment of Process Management, Results, & Continual Improvement
 | **20 mins**  |
| **IDENTIFY NEXT STEPS*****(Total Time: 10 mins)*** |