CITY & HACKNEY QI FORUM FACTSHEET 5: City & Hackney Monthly QI Forum – Terms of Reference

The City and Hackney QI Forum is the core mechanism for leading and progressing QI in City and Hackney. It is central to supporting all the work of project leads, teams, QI coaches, QI sponsors, Improvement Advisor and directorate lead for QI, as described above. For this reason the Terms of Reference are included here in full for the information of all those involved in QI, to understand how the QI Forum manages these responsibilities:

1. **Overview**

- The City and Hackney QI Forum is the monthly opportunity when the directorate leadership in Hackney comes together to take forward Quality Improvement work.
- To this end it has 2 key objectives and focuses (see further detail on these objectives below):

    1. To provide individual QI projects with an opportunity to share their progress and learning with the QI Forum and to receive support on any blockers/issues identified

    2. To provide a forum for the strategic management and leadership of the QI programme, which is led by sponsors and DMT

- The QI Forum is 60 minutes on the last Tuesday of the month 9:30am – 10:30am. The time is split roughly equally between these two areas of focus.

2. **Membership and attendance**

- The City and Hackney QI Forum has core members and additional members.

2.1 Core members

- Core members, who are expected to prioritise the QI Forum, are:
    - QI Sponsors
    - Other members of City and Hackney DMT who are not sponsors
    - QI coaches
    - PPL
    - Performance Lead
    - Quality and Clinical Governance Coordinator (QCGC)
    - Improvement Advisor for City and Hackney from the central QI team

2.2 Additional members

- Project leads and members will be invited by the QCGC to attend when it is their turn to present.
- Invites will be sent for the QI Forum to all project leads, service leads and managers in City & Hackney and anyone is always welcome to attend the QI Forum for their learning, development and interest.

3. Actions

- An action log will be kept for the QI Forum, by the Quality and Clinical Governance Coordinator.

4. Chairmanship

- The City and Hackney QI Forum is chaired by the Clinical Director, who is the lead for QI within City and Hackney and lead sponsor.
- If the Clinical Director can't attend, they will arrange for a deputy to chair the forum who is also a QI sponsor.
- The specific agenda for the QI Forum will be developed and agreed by the Chair, with the support of the Improvement Advisor.

5. Objectives/Priorities

5.1 Project Learning and Support

The objectives of the *Project Learning and Support* session is as follows:

- To provide a realistic amount of time for meaningful discussion and support, projects will be rotated through the QI Forum, with 2-4 projects presenting each time.
- The Clinical Director (& chair of the C&H QI Forum) will decide which projects will be invited each time, with support from the Improvement Advisor.
- Selection of projects will consider factors such as how recently they have attended, the extent to which they are progressing, level of strategic priority for the directorate and whether the project sponsor will be in attendance.
- The Quality and Clinical Governance Coordinator will invite project leads to the QI Forum when identified, with the support of the Improvement Advisor
- Projects will be asked to focus their update on key questions to give the QI Forum a sense of how they are progressing in their project, including applying QI methodology and functioning according to good practice for QI projects; e.g. involving MDT and customers. (See full set of questions/discussion points after this Terms of Reference).
- Members of the forum will provide support and constructive challenge to help projects move forwards.
- Learning will be captured and added to the QI Forum project learning log.
- Sponsors will particularly listen and elicit if there any blockers or issues which they can help resolve which are linked to service issues or helping to develop buy-in, if the project lead is struggling with this.
- Coaches and Improvement Advisor will particularly focus on challenges with QI methodology.

5.2 Strategic leadership and management of programme

- The *Strategic leadership and management* component involves a number of priorities.

5.2.1 Recommendations to DMT to sign-off new projects (including new testing projects and scale-up projects)

- C&H QI has a pathway for the sign-off of new projects (see section 3). Project ideas will come to the QI Forum at an early stage, following discussion with a sponsor and coach/Improvement Advisor.

- Prospective project leads will usually be asked to complete a "Starting a new QI Project Form" so that the QI Forum can determine whether the idea should move forwards as a QI Project. This recommendation will be taken to DMT immediately afterwards, at which the final decision will be made.
- When provisional ideas come to the QI Forum, the Forum will ensure the project has sufficient support from a coach or Improvement Advisor, and sponsor, to understand the issue in greater depth, build engagement and ultimately develop their charter
- New project charters will come back to the QI Forum when completed for information.
- New project leads will be invited back to the forum within 3 months, so that the QI Forum is able to oversee progress and provide support (as we have learnt there is greatest risk of project failure before their start testing (before score 2.5).

5.2.2 Recommendations to DMT to agree closure of projects; including overseeing implementation steps of successful projects

- The QI Forum will oversee the closure of projects to ensure that successful projects have undertaken sufficient implementation planning and that learning is captured from projects that are being closed before they have achieved improvement
- Management of implementation is a very important stage of projects once improvement has been achieved and involves steps to ensure successful change ideas are integrated into business as usual for the whole team. Projects that have achieved improvement will be expected to use the implementation planning template, available on the QI Microsite[1], supported by both coach and sponsor. This document shall be brought to the QI Forum for the closure discussion, so that the Forum is assured implementation planning is sufficient and can provide further input.

5.2.3 "Orange Flags"; discussion of risks and issues in progression of programme and individual projects

- The QI Forum will include a standing item called "Orange Flags; Worries and Niggles". This is a space for members for the QI Forum to raise any concerns - no matter how big or small - which they have about projects or the programme as a whole.
- The aim of this space is to ensure that any problems are raised quickly (particularly for the attention of sponsors and senior leadership) and receive the input of the whole Forum to resolve.
- It mitigates against the risk of concerns being held by individuals without the awareness of other stakeholders, who can help address them.

5.2.4 Strategic thinking to strengthen Quality Improvement work

5.2.4.1 General

- The QI Forum will discuss items related to the strategic progress and development of the programme, such as service user involvement, how to support the efficiency of projects, how to effectively manage the implementation and quality control stage of projects, etc.
- Because of time, the above discussions will be short, however the Forum will also meet 1-2 times a year for longer groupwork discussion to reflect on strategy. One of these meetings will be during the IHI visit in October.

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[1] https://qi.elft.nhs.uk/collection/implementation-and-sustaining-the-gains/

5.2.4.2 Quality prioritisation process

- Increasingly, QI work in City and Hackney should reflect the strategic priorities of the directorate, so that there are fewer projects which are focused on what really matters to the directorate and our service users and carers. This will mean energy across the programme (from sponsors, coaches, etc) is concentrated on the areas of highest priority.
- The QI Forum needs to be assured that the priorities reflect the issues that matter most and the feelings and experiences of service users and carers. Other intelligence gathering and discussion/conversation, creative approaches may be needed to arrive at priorities. The C&H QI Forum is responsible for deciding on and leading that process, with the support of the Improvement Advisor.

### 5.2.5   Management of operational tasks associated with programme

- The City and Hackney QI Forum will be responsible for any operational tasks related to the QI programme in Hackney. This will include, but not be limited to, the following:

5.2.5.1 Identification of staff for QI training & recruiting coaches

- The QI Forum will identify staff for the waves of ISIA QI training, which is mainly designed for project leads and senior leadership.
- The QI Forum will also manage a process for recruiting suitable coaches when coaching training is offered. This will involve working with service leads and managers to identify suitable staff.
- QI Forum members will also have a role in promoting Pocket QI Training

5.2.5.1 Planning events and visits

- The success of the ELFT QI programme, including the work in City and Hackney, generates a lot of external interest, which is also an opportunity to celebrate successes. The City and Hackney QI Forum will plan and manage these events to get the most out of these opportunities.
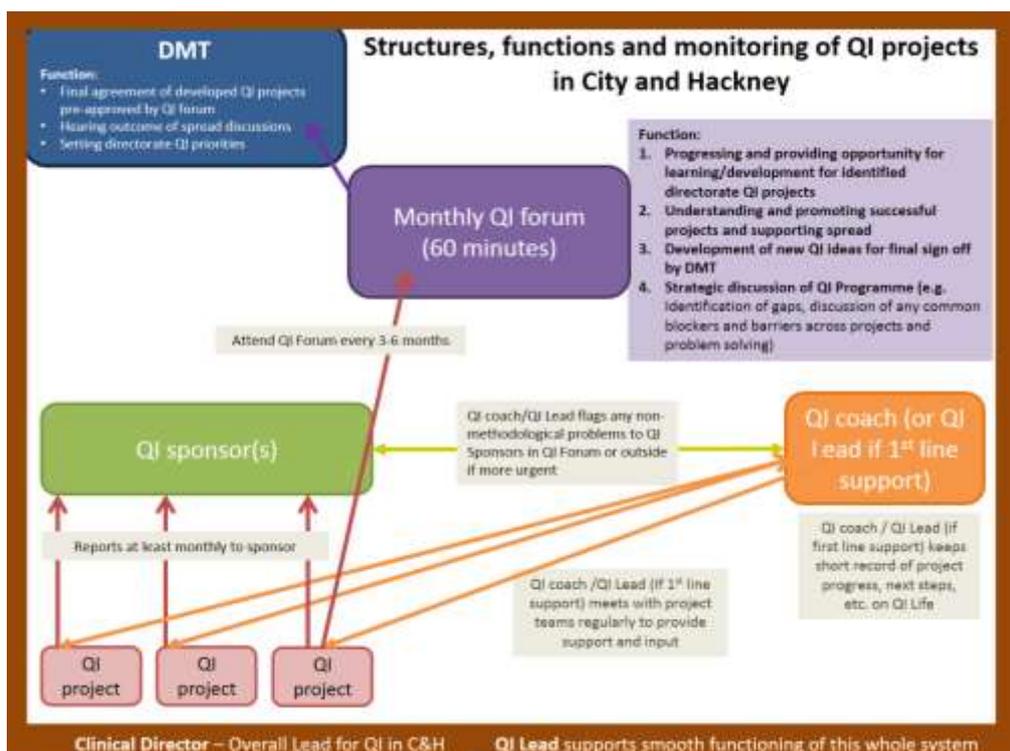
Project updates to C&H QI Forum - Guidance to project leads

As noted in the TOR, the purpose of project leads attending the QI Forum is to identify and discuss enablers and challenges to the progression of projects with sponsors, coaches and other project leads, in order to learn together and help move projects forwards.

Each project has 5 minutes to update, with 3-5 minutes for questions. Please focus on the most relevant questions below in your update. Please ensure your charts and other project information is up to date on QI Life before you attend the QI Forum.

Key questions to focus on in your update:

1. Have you run any PDSA tests of change in the last month? If not, what is stopping you from testing?

2. Are you collecting and looking at data over time regularly? If not, what is holding you back?

3. Are there any factors that are holding the project back? If so, what are they?

4. Is there anything else that you need help with?

5. What is your plan for the next month?

6. Who is on your team? Are all stakeholders in your issue represented?

7. How are you involving your customers in your project (for most C&H projects this will be service users and/or their carers)?

8. Do you have any learning you could share about how to make QI work as efficient as possible? (It is a priority of the QI Forum to gather and support the dissemination of ideas around efficiency in QI projects (whilst still adhering to the QI method)

If you have any questions about this, please discuss with your QI coach or Improvement Advisor.
The below diagram illustrates how the key roles and structures for QI in City and Hackney fit together and how monitoring and oversight works.