

QI IN CLINICS PROGRAM GUIDE



Please read this guide for program description, logistics and FAQs.

QI in Clinics – Cohort 1 important dates

Course pre-work: April 5 – April 25, 2023

Program starts: April 26, 2023

Program ends: September 13, 2023

Contact

If you have questions about the program, please contact Health Quality Council by email at QIinClinics@hqc.sk.ca.



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1.0 Program Overview

1.1 What is the QI in Clinics learning program?

QI in Clinics is a four-month learning program designed to build capability in primary health care for leading quality improvement (QI) work, with a particular focus on optimizing the clinical microsystem. The target learning group for this program includes physicians and medical office staff. The program includes a mix of theory and experiential learning, along with individual coaching. A clinic team will lead a clinic-wide improvement project. Clinic teams enrolled in the course must identify an improvement aim and lead a hands-on improvement project.

1.2 What is a clinical microsystem?

The clinical microsystem is a small, interdependent group of people who work together regularly to provide care for specific groups of patients. In the primary care setting, the clinical microsystem is usually an individual clinic. QI in Clinics aims to build capability for leading QI work at the clinic level. The theory of change is that an optimized clinical microsystem results in improved team-based care, resulting in improved patient and provider experience and satisfaction.

2.0 Participant Profile

2.1 Is QI in Clinics for you?

QI in Clinics is for you if you:

- want to develop the capability to facilitate and lead successful quality improvement initiatives in your clinic;
- wish to deepen your knowledge of measurement for improvement, with a particular focus on using your electronic medical record and patient panel report data to understand the current state of your clinic, and;
- wish to further develop your ability to lead, nurture, and engage teams in improvement.

This program has been designed with physicians and medical office staff as the primary learning group. Clinicians participating in the program should be **actively practising** in a **primary care clinic setting** (i.e., clinical work is the primary role – at least 0.5 FTE would be spent in a clinical setting). Participants do not require specific previous QI experience to register.

2.2 Coaches and Data Support

Throughout the program, participants will be supported in their learning and project work by coaches. There will be regular coaching check-ins throughout the program. Participants may also receive support in using data sources to understand the current state of their clinic (which may include leveraging electronic medical record data and/or patient panel reports).

3.0 Participating in QI in Clinics

QI in Clinics is an intense learning experience. **It requires a commitment of time and resources from participants, as well as their clinics.**

3.1 Costs

There is currently no tuition charged for this program. Program costs are subsidized through a partnership between the Health Quality Council (HQC), the Saskatchewan Medical Association (SMA) and the Ministry of Health. **To respect this funding arrangement, 100 per cent attendance at all workshops is mandatory.**

Funding is available through a partnership with the SMA to reimburse participants for time spent in program activities. Up to three practising physicians, one MOA, and one office manager (for a total of five team members per clinic) may be eligible for reimbursement.

Practising physicians are reimbursed at a rate of \$150.00/hour. Resident physicians are reimbursed at a rate of \$75.00/hour. MOAs are reimbursed at a rate of \$25.00/hour and office managers are reimbursed at a rate of \$35.00/hour. Up to **58 total hours** per team member may be reimbursed as outlined below:

- **Workshop participation.** Participants may be reimbursed for up to 15 hours of workshop time (5 workshops x 3 hours each)
- **Online learning.** Participants may be reimbursed for up to 11 hours of online learning time.
- **Project work and coaching sessions.** Participants may be reimbursed for up to 32 hours of coaching and project work time.
- **Reference materials.** Up to \$250 per person for reference materials.

3.2 Time and Human Resources

Participants will need dedicated time to support their project teams, complete project work and attend workshops.

- The approximate time participants can expect to spend in QI in Clinics is **58 hours** over four months (roughly a 0.1 FTE)
 - Participants should expect to spend approximately 11 hours on reviewing the online materials (six online modules) over the course of the program.
 - Participants should expect to spend approximately 15 hours of time in virtual workshops (five workshops) over the course of the program.
 - Participants should expect to spend approximately two hours per week on applied project work (project development and coaching sessions) for a total of 32 hours.

3.3 Expectations for Active Participation

- **Participants are expected to attend and fully engage in all workshops.**

- **Participants who miss workshop days** (for reasons other than family or medical emergencies) **may be asked to discontinue the program.**
 - These participants may also be denied reimbursement for related program activities, if applicable.
- Participants are expected to share progress on their QI projects with program supports (coach, data supports) and their peers.
- It is expected that participants will bring their successes and challenges forward to the group. In return, participants are asked to give feedback to their colleagues in workshops.
- An important aim of the program is to develop provincial capability for leading QI in primary care clinics. As such, graduates are expected to give back to the learning community. For example, graduates might be asked to be QI in Clinics guest speakers for future cohorts or to provide feedback on program improvements.

4.0 Program Learning Intents

4.1 Program Aims

By the end of the program, participants will be able to:

- **Apply** QI tools and methods to an improvement project in their clinical microsystem.
- **Lead and facilitate** an improvement project in their clinical microsystem.
- **Coach and teach** QI tools and methods to others.

To achieve these aims, the program is organized around three key themes:

- Quality improvement science and methodology
- Quality improvement in the clinical microsystem
- The human side of change: Working with teams in complex systems

Throughout the course, these themes will continue to build on each other. Rather than being viewed as separate components, they should be considered as an integrated set of concepts and philosophies.

4.2 Program Learning Goals

1) Quality improvement science and methodology

This theme provides the foundation for leading, facilitating and teaching quality improvement science. It provides an overview on the model for improvement and its application to clinical microsystems. By the end of the program, participants will be able to:

- Facilitate and support a team towards identifying and achieving a quality improvement aim.
- Understand and apply quality improvement tools and methodology to their own context.

2) Clinical microsystems

This theme explores the context for quality improvement at the primary health care clinic level. By the end of the program, participants will be able to:

- Define a clinical microsystem.
- Describe their current clinical microsystem and identify challenges to providing quality care.

3) The human side of change – working with teams in complex systems

This theme explores the people side of change – working with individuals and teams to make meaningful and lasting change. By the end of the program, participants will be able to:

- Develop an improvement team in their practice.
- Coach others on using quality improvement science and tools.
- Incorporate principles of effective teamwork into improvement work.
- Apply change management strategies as a team.
- Engage teams in thinking differently to make innovative improvements.
- Hear the voice of their customer, through engaging patients and families in their improvement work.
- Describe the principles of patient- and family-centred care and incorporate them into improvement work.

4.3 Link to CanMEDS-FM Competencies

This program has been designed to build capacity and capability in the following CanMEDS-Family Medicine (CanMEDS-FM) competencies.

CanMEDS-FM Role	Key Competency	Enabling Competencies
Family Medical Expert	1. Practices generalist medicine within their defined scope of professional activity	1.5 Recognizes and responds to the complex, uncertainty, and ambiguity inherent in medical practice.
	4. Establishes plans for ongoing care and timely consultation when appropriate	4.1 Works collaboratively with patients, their families, other health care colleagues, and key stakeholders to provide comprehensive care to individual patients, patient populations, and communities
	5. Actively facilitates continuous quality improvement for health care and patient safety, both individually and as part of a team	5.1 Recognizes potential health care delivery risks and patient safety incidents, working proactively to prevent harm, and remediate identified concerns 5.2 Adopts strategies and applies improvement science to promote continuous quality improvement 5.3 Improves patient safety, addressing human and system factors as part of a commitment to quality 5.4 Implements mechanisms to optimize patient care in practice
	7. Contributes generalist abilities to address complex, unmet patient or community needs, and emerging health issues, demonstrating community-adaptive	7.1 Assesses and adapts practice based on community needs, anticipating and planning for emerging health care issues in the community.

	expertise.	
Collaborator	1. Works effectively with others in a collaborative team-based mode	<p>1.1 Establishes and maintains positive interdependent relationships with others</p> <p>1.2 Describes one’s own role and the roles of others (including clinical, research, education, or administrative roles)</p> <p>1.4 Respects diversity of roles and perspectives while ensuring integrated patient-centred care</p> <p>1.5 Demonstrates role flexibility; for example, changing from team member to team leader as necessary based on context, team composition, and patient needs</p>
	2. Cultivates and maintains positive working environments through promoting	<p>2.1 Demonstrates a respectful attitude toward others</p> <p>2.2 Engages others in shared decision making and finding common ground with team members</p> <p>2.3 Works with others to promote understanding, manage differences and negotiate conflict</p> <p>2.4 Recognizes and reflects on one’s own contributions and limitations, and their impacts on team function</p>
Leader	1. Contributes to the improvement of comprehensive, continuity-based, and patient-centred health care delivered in teams, organizations, and systems	<p>1.1 Applies the science of quality improvement to contribute to improving systems of patient care</p> <p>1.2 Fosters a culture that promotes patient safety</p> <p>1.4 Uses health data and technology informatics to improve and inform the quality of patient care across all levels of the health care system</p> <p>1.5 Works to engage patients, families, and caregivers in the process of health care improvement across all levels of the health care system</p>
	3. Demonstrate collaborative leadership in	3.1 Facilitates changes within health care

	professional practice to enhance health care	to enhance services and outcomes 3.2 Advances quality care and health outcomes through the engagement of others to impact all levels of the health care system 3.3 Works with others in coalitions to achieve results that enable practice, organization, and system transformations
	4. Manages career planning, finances, and health human resources in a practice	4.3 Implements processes to enhance personal, career, and practice improvement
Scholar	1. Engages in the continuous enhancement of their professional activities through ongoing learning	1.2 Identifies opportunities for learning and improvement by regularly reflecting on and assessing their performance using various sources 1.3 Engages in collaborative learning to continuously improve personal practice and contribute to collective improvements in practice
	2. Teaches students, residents, the public, and other health care professionals	2.2 Promotes a safe learning environment 2.3 Ensures patient safety is maintained even when learners are involved 2.4 Plans and delivers a learning activity 2.5 Provides feedback to enhance learning and performance 2.7 Integrates coaching, mentorship, and role-modelling into teaching practice
	3. Integrates best available evidence into practice considering context, epidemiology of disease, comorbidity, and the complexity of patients	3.1 Recognizes practice uncertainty and knowledge gaps in clinical and other professional encounters, and generates focused questions that have the potential to bridge the gaps 3.5 Integrates evidence into decision making in practice
	4. Contributes to the creation and dissemination of knowledge relevant to family medicine	4.4 Participates in and conducts quality-improvement activities
Professional	2. Demonstrates a commitment to society by recognizing and responding to societal needs in health care	2.2 Demonstrates a commitment to quality care and continuous quality improvement

	3. Demonstrates a commitment to the profession by adhering to standards and participating in physician-led regulation	3.4 Fosters an environment of respect and collegiality
	5. Demonstrates a commitment to reflective practice	5.1 Demonstrates the ability to gather, interpret, and appropriately act on information about personal performance, know one’s own limits, and seek help when needed 5.2 Reflects on practice events, especially critical incidents, to deepen self-knowledge and recognize when something needs to change and does it
Health Advocate	2. As a resource to their community, assesses and responds to the needs of the communities or populations served by advocating with them as active partners for system-level change in a socially accountable manner	2.2 Improves clinical practice by applying a process of continuous quality improvement to disease prevention, health promotion, and health surveillance activities 2.3 Assesses community needs and identifies assets in the community or population served and contribute to a process to improve health and equity

5.0 Guiding Principles

This program is built on five key guiding principles:

- 1) **All teach, all learn.** Active participation is expected throughout the program – at workshops, during coaching check-ins and through improvement project work. Participants are expected to contribute to the learning environment by sharing experiences, challenges and successes as well as providing peer feedback.
- 2) **Learning requires a growth mindset.** Participants will get the most out of this program if they are able to cultivate a growth mindset. This is the belief that abilities can be developed through dedication and hard work. It requires accepting frustration and embracing failure as an important part of the experience of learning.
- 3) **Our learning community is a safe space.** There may be times when participants will be sharing information that is personal or sensitive, such as difficult work or team experiences. It is an expectation of the program that participants will respect the confidentiality of the group and its discussions. This will allow for an environment where issues can be addressed openly and honestly.

- 4) **Shared ownership of the learning community.** Together we create our learning space. This means that everyone – participants and coaches – has a responsibility for contributing to the development of the community. Everyone has a responsibility for sharing ideas for improvement and respectfully voicing concerns. Everyone has a responsibility for upholding the community agreements.
- 5) **To learn how, you must do.** Experiential learning is a key component of the program. Participants will have opportunities for hands-on learning and application of tools and methods. These learning activities are designed to transform knowledge into skill and put theories into action.

6.0 Program Components

1) Guided preparation and course pre-work

To ensure that all participants receive orientation to the program and have a common understanding of improvement science language and theory, there are two online modules that must be completed prior to the first workshop.

In the first module, *All About QI in Clinics*, participants are provided with an overview of the program, a brief context for the program, a description of program expectations and an overview of available supports.

In the second module, *Introduction to QI and the Clinical Microsystem*, participants are provided with an introduction to QI theory and foundational tools.

These modules, along with a coaching check-in, are intended to support participants in their initial thinking around potential project selection or the problem they would like to solve.

2) Flipped classroom learning

This program uses a flipped classroom methodology. In a flipped classroom, foundational content (information that would typically be delivered by lecture) is delivered primarily through online modules.

Online modules are designed for self-paced learning and are to be completed prior to the workshops.

Material covered in the online modules will not be re-delivered at the workshop; participants are expected to come prepared to actively engage with the course concepts.

3) Virtual Learning Workshops

There will be five Learning Workshops over the course of the program, including a final Capstone Event to celebrate project progress. Learning Workshops will be delivered virtually. Workshop time is used to further explore the concepts in a more active way – through discussions, simulations, or other practical exercises.

4) Action periods

Between workshops, participants will be actively working with their team on an improvement project. Each action period focuses on moving through the stages of the improvement cycle, from problem identification to implementing changes. The action period also includes workshop preparation, such as completing the online modules, and applying the QI tools introduced to their project.

5) Coaching support

Throughout the program there are multiple opportunities for coaching support. During the guided pre-work (prior to the first workshop), participants will have an opportunity to connect with their coach to establish a working relationship and to think through some initial areas or problem(s) for exploration that they might want to work on over the duration of the program. As well, for each action period, there is a coaching check-in to support participants through project challenges. We highly encourage participants to use the coaching support available throughout the duration of the program.

7.0 Curriculum Overview

The curriculum of the QI in Clinics learning program follows the sequence of an improvement project – starting with problem identification and project planning, through to testing and implementing changes. It is expected that teams will not complete their project within the four-month timeframe, but rather have the foundational QI skills and practices to continue implementing QI within their clinic long-term.

Unit 1: Introduction to QI and the Clinical Microsystem

The program begins with three weeks of time to complete the pre-work modules. While most of the pre-work will be completed through self-paced and independent learning, coaching support will be available to ensure that participants are on track and prepared for the first workshop.

During the pre-work, participants will explore improvement science fundamentals – the theory of profound knowledge and the model for improvement. They will understand the importance of organizing a team for improvement work, including how to communicate with and nurture teams during the early stages of a project.

Unit 2: Understanding Your Current State and Focusing Collective Efforts

Participants will explore problem identification, analysis strategies and learn how to truly understand a problem. They will continue to explore the fundamentals of quality improvement, such as working with teams, baseline data collection, developing measures and planning improvement. They will continue to build on the people side of change, including the rollercoaster of change, engaging teams in change and characteristics of effective teams.

Unit 3: Making Meaningful Improvement

Participants will be focusing on moving from problem identification and analysis (thinking) to action (doing). This is where participants will understand how to generate and test ideas for change, using the PDSA cycle. Participants will also be introduced to understanding motivation, resistance, and conflict to support their improvement team.

Unit 4: Sustaining and Spreading Improvements

Participants will be introduced to the concepts related to sustaining and spreading changes – including successful project close-out and transition and leading and supporting others through change as improvements spread to new audiences and areas. We will also explore some of the elements related to coaching others in QI including the art of asking powerful questions and active listening.

Unit 5: Celebrating Change - Capstone

Participants will create a capstone presentation that highlights their reflections on their learning, the experience of learning, and areas for additional growth and development. They will also include a brief summary of their QI project, including their aim statement and tests of change.

8.0 Program Schedule/Key Dates

All program elements listed below are mandatory.

Program Element	Key Dates/Timeframes
Guided course pre-work (Online modules, coaching check-in)	April 5 – April 25, 2023
Workshop #1 Introduction to QI and the Clinical Microsystem	April 26, 2023 9:00 am – 12 noon
Action period (Online module, coaching check-ins, project work)	April 27 – May 16, 2023
Workshop #2 Understanding Your Current State and Focusing Collective Efforts	May 17, 2023 9:00 am – 12:00 noon
Action period (Online modules, coaching check-ins, project work)	May 18 – June 6, 2023
Workshop #3 Making Meaningful Improvements	June 7, 2023 9:00 am – 12:00 noon
Action period (Online modules, coaching check-ins, project work)	June 8 – June 27, 2023
Workshop #4 Sustaining and Spreading	June 28, 2023 9:00 am – 12 noon
Action period (Online modules, coaching check-ins, project work)	June 29 – September 12, 2023
Workshop #5: Capstone Celebrating Change (TBD in-person or virtual)	September 13, 2023

9.0 Project Information

9.1 Project Selection

It is essential that participants have an appropriate improvement project to focus their learning. You are asked to identify a problem within your clinic that you will then develop into an improvement project to work on throughout the program.

Project Criteria

An appropriate improvement project meets the following criteria:

- ✓ The project focus must be related to quality improvement.
- ✓ The project will have clinic-wide impact.
- ✓ The results are expected to be significant for patients/clients, clinic staff and/or the clinic operations.
- ✓ There is a program sponsor who is committed to actively providing guidance, routinely monitoring project progress, and removing barriers. An appropriate sponsor is someone who oversees the workflow or processes that occur within the scope of your project (typically the clinic owner or the SHA manager of the clinic).
- ✓ It is scoped appropriately so progress can be made in four months. Within this timeframe, one could expect to answer the question, “How do you know a change is an improvement?”
- ✓ It must be measurable – participants will be expected to track improvement measures (outcome, process, and balancing) on run charts.

Project Components

Projects must have a quality improvement focus. This means that projects must include the following components:

- **Projects must engage others in the clinical microsystem.** Projects must have a broader scope than an individual clinician’s practice. For example, instead of improving one’s own referral practices, a project might look at reducing referral variation across a clinic.
- **Project must go beyond data collection.** The project should be one that allows the team to test changes and potentially show improvement on a project aim. Tests of change should be started within the four-month timeframe of the program. The project focus must clearly outline what will be better for patients.

9.2 Additional Project Supports

Patient/Family Partners

We recommend including patient and family partners (PFPs) as members of the QI project team. PFPs have lived experience with health care, either as a patient or a family member. The role of the PFP is to bring the unique perspectives of someone who has recently experienced care related to the QI project.

Key expectations for this role:

- Passion for patient-centred care and desire to improve care for all patients and their families.
- Talk about positive and negative experiences as a patient or family member.
 - Ability to reflect on what went well and how things could have been done differently, and to consider beyond one’s own personal experiences.
- Collaborate with the project team.
 - Participate in team meetings, as needed and desired.

- Speak up and share suggestions and ideas for improvement.
- Ask questions for clarification, when needed.
- Consider multiple and sometimes competing perspectives.
- Maintain confidentiality of sensitive information related to the project.
- Contribute to activities related the QI project, including but not limited to:
 - Reviewing or creating informational or educational materials for a lay audience.
 - Partnering with community stakeholders, if applicable.

Data Source Support

Participants will be supported in navigating data sources that may help them understand the current state of their clinical microsystem. These data sources include, but are not limited to, Electronic Medical Records (EMRs) and Patient Panel Reports (PPRs). Staff from the Saskatchewan Medical Association (SMA) Electronic Medical Record (EMR) Practice Supports team and Health Quality Council staff supporting QI in Clinics can provide assistance in accessing and understanding these data sources.

9.3 Ethics and Privacy Considerations

The issue of ethics review is an important one to consider when you are planning your improvement project. Ethics reviews are required for research studies; however, there are differences in opinion about whether quality improvement projects require ethics review. It is up to participants to discuss the issue with their sponsors or senior leaders to determine if an ethics review is required.

Regulations set out by the *Health Information Protection Act* (HIPA) may also impact improvement projects. Again, it is up to the participant to discuss the project and, in particular, any data being collected, with the privacy officer for their organization to determine if project plans are in compliance with HIPA.

10.0 Program Materials and Resources

- **Computer and internet connection.** Participants will require a computer with an internet connection.
- **Moodle.** This program uses an online learning platform called Moodle. Participants will be provided with a user account and password to access the online materials.
- **Recommended Reference Books**
 - **The Improvement Guide: A Practical Approach to Enhancing Organizational Performance.** (2nd edition), Gerald J. Langley, Ronald D. Moen, Kevin M. Nolan, Thomas W. Nolan, Clifford L. Norman, and Lloyd Provost.
 - **Improvement Science at Your Fingertips: A resource guide for coaches of improvement.** Brandon Bennett, Alicia Grunow, and Sandra Park.
 - **The Team Handbook.** (3rd edition), Peter R. Scholtes, Brian L. Joiner, and Barbara J. Streibel.
 - **The Health Care Data Guide: Learning From Data to Improve Health Care.** Lloyd Provost and Sandra Murray.

11.0 Sponsor Selection

The sponsor is the person(s) in the clinic who provides the resources required to support and nurture the project and minimizes organizational obstacles or barriers to the improvement effort. In a practice setting, the sponsor may be the clinic owner, the most senior physician, or the SHA manager of the clinic.

The sponsor(s) would also ensure that the QI in Clinics participants have dedicated time to complete online learning and assignments, support his/her project team, and attend the five Virtual Learning Workshops. The recommended time allocation for participation in QI in Clinics is approximately 0.1 FTE, which translates to about two hours per week during non-workshop weeks.

Program Sponsor Expectations

The program sponsor is a key role for project success. In agreeing to be a program sponsor, the sponsor is committing to the following:

- ✓ **Regularly communicate with the project lead.** While the program sponsor may not attend all team meetings, there should be a communication plan in place for keeping them aware of progress and challenges. This is a shared responsibility between the participant and the sponsor.
- ✓ **Remove barriers and supports project progress.** The sponsor must actively work to remove project barriers and support project progress. This could include collaborating with other leaders and clinicians, raising issues with leadership or other approaches.
- ✓ **Allocate resources and links to supports.** As required, the sponsor will allocate resources (human, technical, financial) to support the project. This includes working to gain the support of other clinics staff and enabling the participation of clinic staff in the improvement project as needed.
- ✓ **Provide the participant with regular feedback.** Throughout the program, sponsors should be providing regular feedback to the participant on what is working well and areas for further development.
- ✓ **Attend the capstone workshop. Sponsors are required to attend the capstone workshop.**

Please note: Depending on the participants' roles/context, it is possible that two people may co-sponsor QI in Clinics participants. One person would be an operational sponsor and would be responsible for supporting/removing barriers for the improvement project work. Another person would be an administrative sponsor and would support/free up time for the participants to complete all required program elements.

12.0 Frequently Asked Questions (FAQs)

1) I have an idea for a QI project but I'm not sure it will work. Can I modify my project after I begin the program?

Yes. One of the key learnings of QI in Clinics is to lead with the problem you're trying to solve rather than the solution. In other words, identifying the problem to be solved is the first step in the quality

improvement process. The second unit of the program is devoted to understanding the problem in order to better define your project. After going through the process of analyzing the problem, collecting baseline data, and understanding the current state, you will be better equipped to develop your project idea, focus, and scope.

2) What is meant by having a team work on the project?

Involving and working collaboratively with others is vital for ensuring the success of the changes being made. This could mean including important stakeholders as members of the formal team as well as engaging them in other ways. As part of the program, you will learn about setting up a team (who needs to be involved, what team size would be appropriate for your project, etc.) and working with others (identifying and communicating with stakeholders). You will also explore different ways of working together – collaborating through both formal and informal approaches. The problem that you identify should be such that a team effort will be required to make improvements. If the proposed problem is very narrow in scope (impacting only your individual clinical practice), it is recommended that you connect with [Health Quality Council](#) to discuss options for better aligning the problem you've identified with the program requirements.

3) What problems would not be appropriate for this program?

This program is designed for applicants to develop quality improvement projects in response to a problem. Examples of projects that **would not fit** with this program include:

- **Projects focused on research.** This program is focused on projects designed to close the gaps in current quality of care. Projects focused on understanding current state of variation, without a clear direction for improvement, would not be appropriate for this program.