

## Developing a Theory of Action to Deliver Your Theory of Improvement

**Brandon Bennett**, Principal Advisor, Improvement Science Consulting; Senior Fellow, Carnegie Foundation

**Melissa Chabran**, Managing Director, Associate, Networked Improvement Science, Carnegie Foundation

**Patrice Dawkins-Jackson**, Director, Post Baccalaureate Fellowship Program, Associate Networked Improvement Science, Carnegie Foundation

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# Developing a Theory of Action to Deliver Your Theory of Improvement

# Faculty



**Brandon Bennett**

Senior Fellow,  
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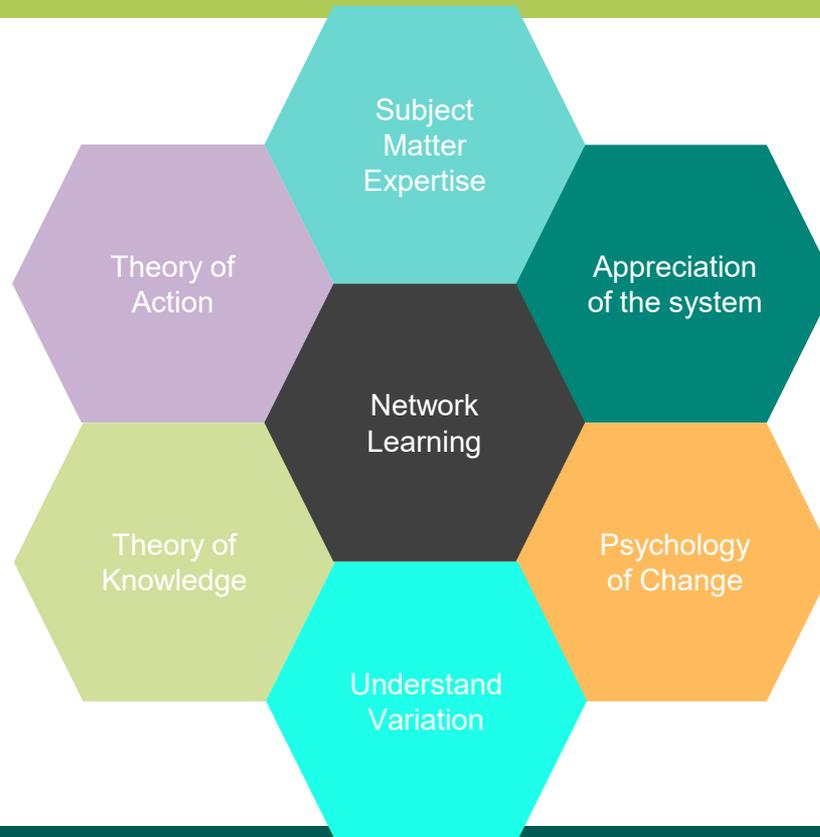
**Patrice Dawkins-Jackson**

Associate, Networked Improvement  
Science, Director, Post-Baccalaureate  
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# Learning Objectives

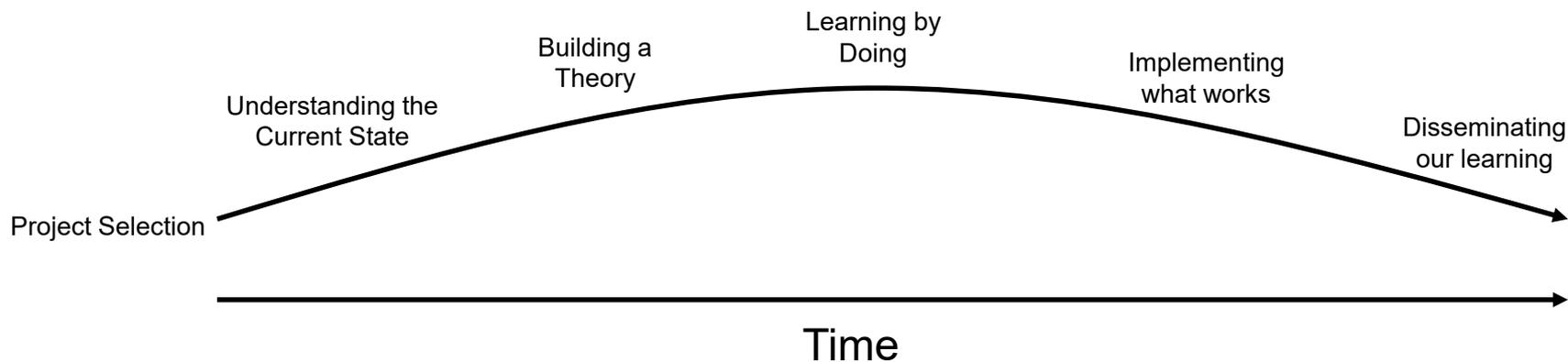
1. Understand the arc of an improvement journey
2. Appreciate the need and utility of theory-based learning to guide the improvement journey
3. Explore learning systems and the role they play in managing the improvement journey
4. Distinguish between measures connected to theory-based learning and measures connected to engagement in the work of improvement

# Reviewing some Improvement Science Basics



Deming 1994, Bryk et al 2015

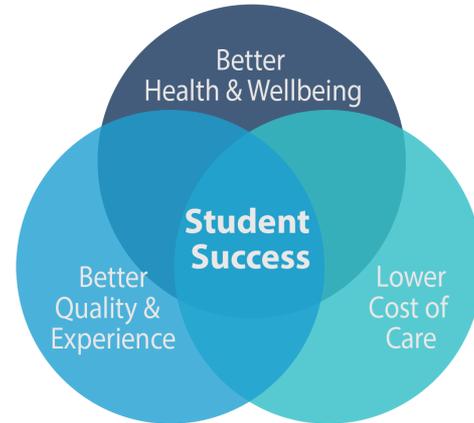
# Arc of an Improvement Journey



# Case Study – TAIHE (Triple Aim in Higher Education)

# Background

1. What is the Triple Aim?
2. Who: 8 Universities in the USA
3. Mixture of public, private, large and small



# Our Purpose

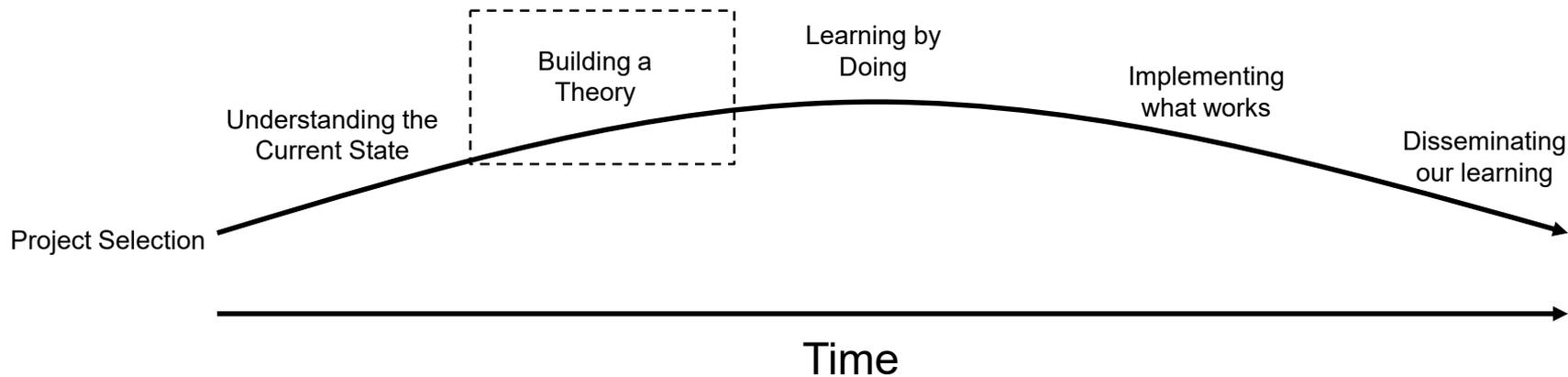
Institutions coming together as part of the initial Pursuing the Triple Aim in a Higher Education Setting (TAiHE): A Learning and Action Collaborative will learn and innovate together to identify, test, and spread measurable changes to improve health, experience, and cost within their own populations and provide examples for other institutions to follow in student health and wellbeing improvement

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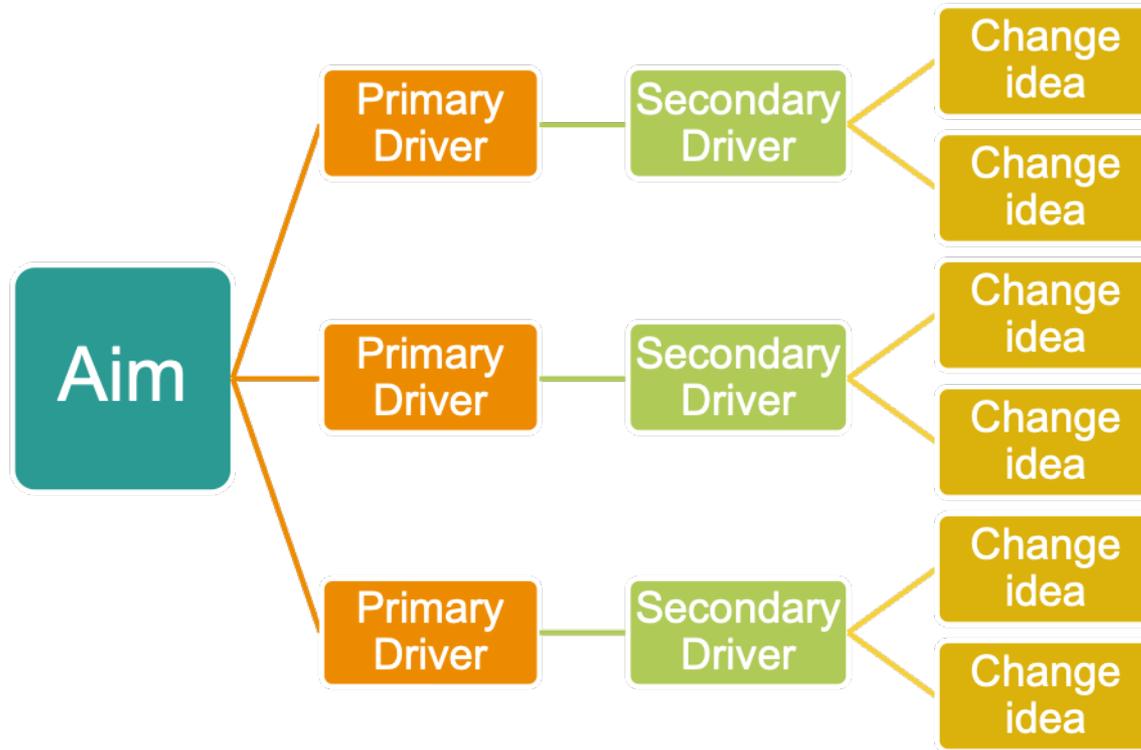
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# Part one – Building a Theory

# Arc of an Improvement Journey



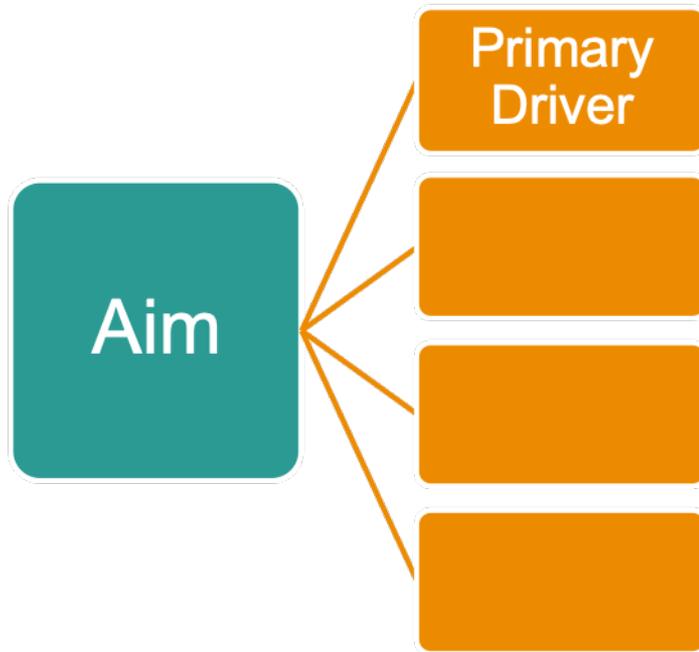
# Working Theory of Practice Improvement



***“Possibly wrong, definitely incomplete”***

Bennett and Provest 2015

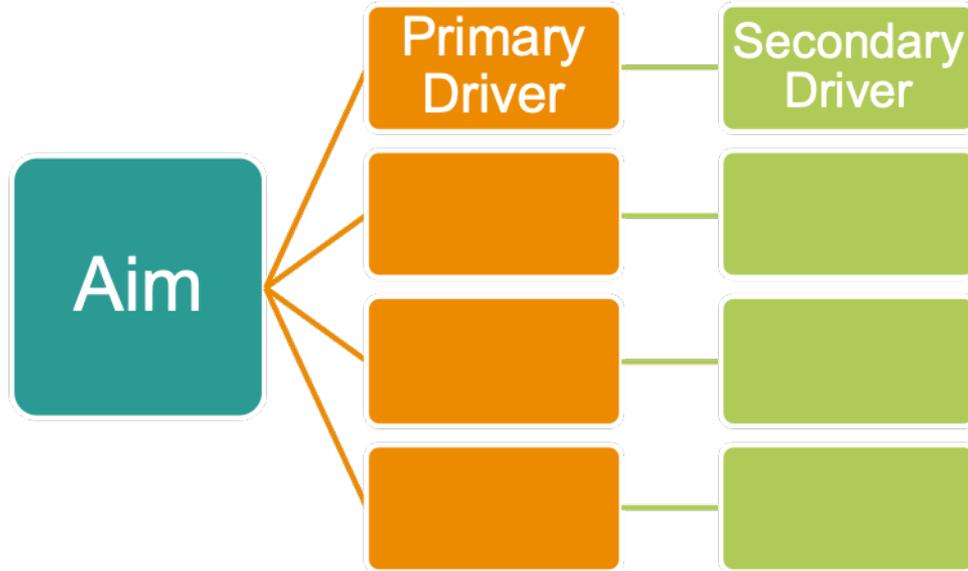
# What are Primary Drivers?



## Primary Drivers

- The **WHAT**
- 3-5 drivers
- Similar "grain" size
- High leverage
- Within span of control

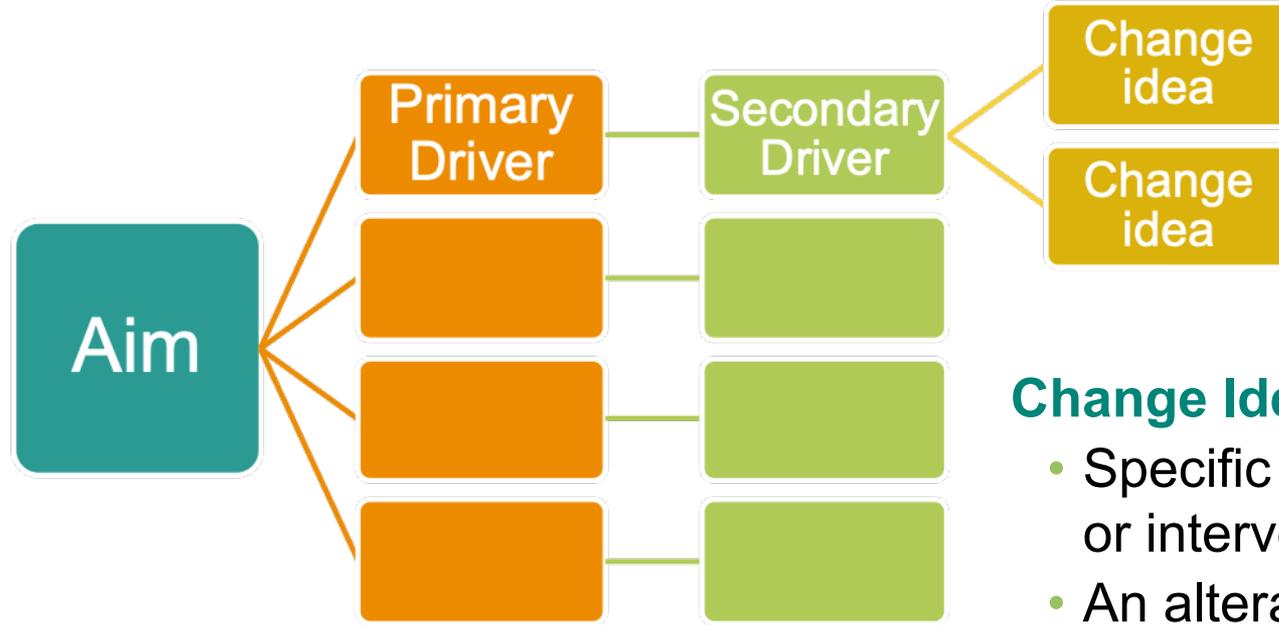
# What are Secondary Drivers?



## Secondary Drivers

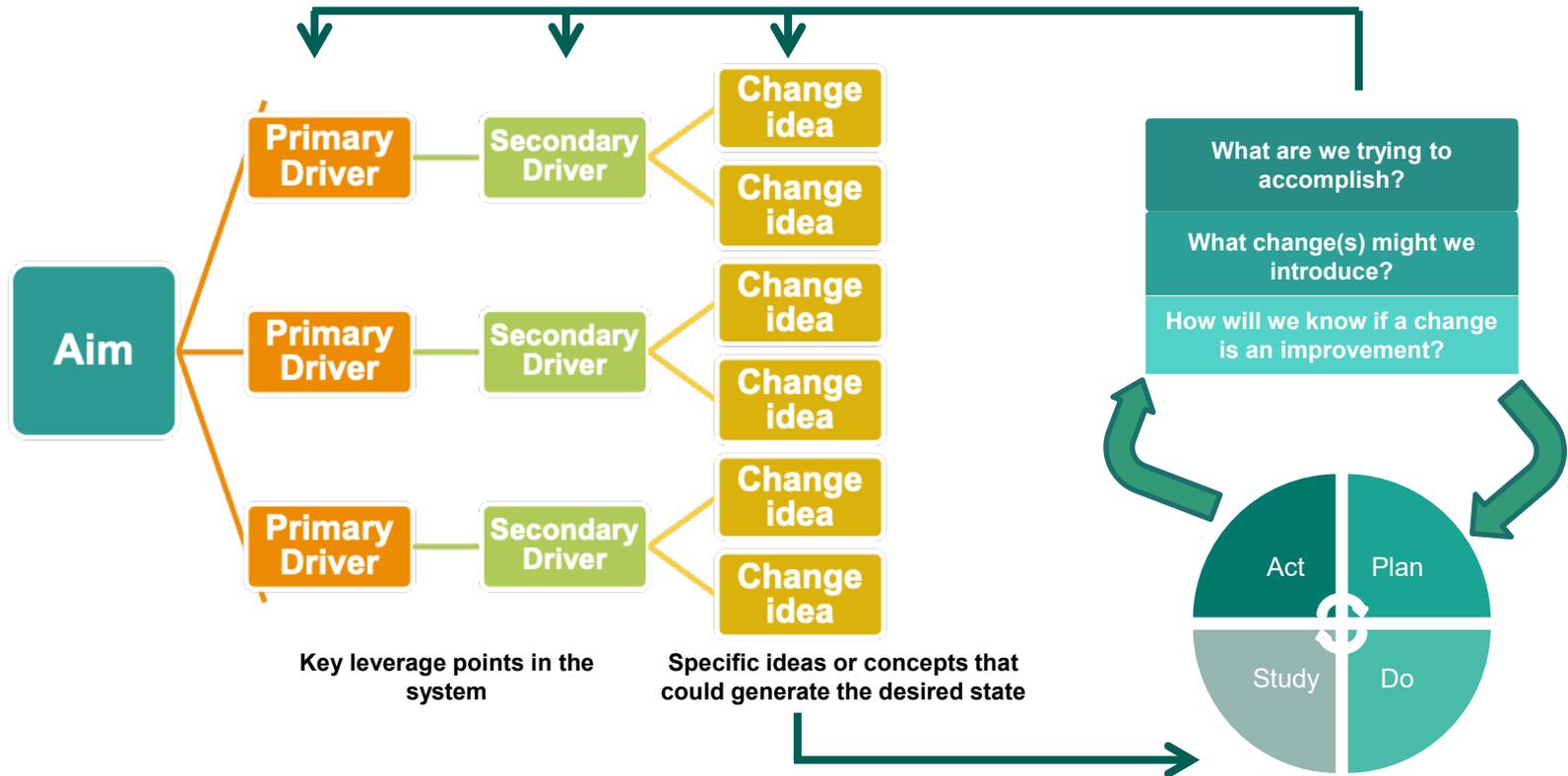
- The **WHERE**
- Specific leverage points in the system
- Norms, processes, structures, etc.

# What are Change Ideas?



## Change Ideas

- Specific work practices or interventions
- An alteration to how work is currently done



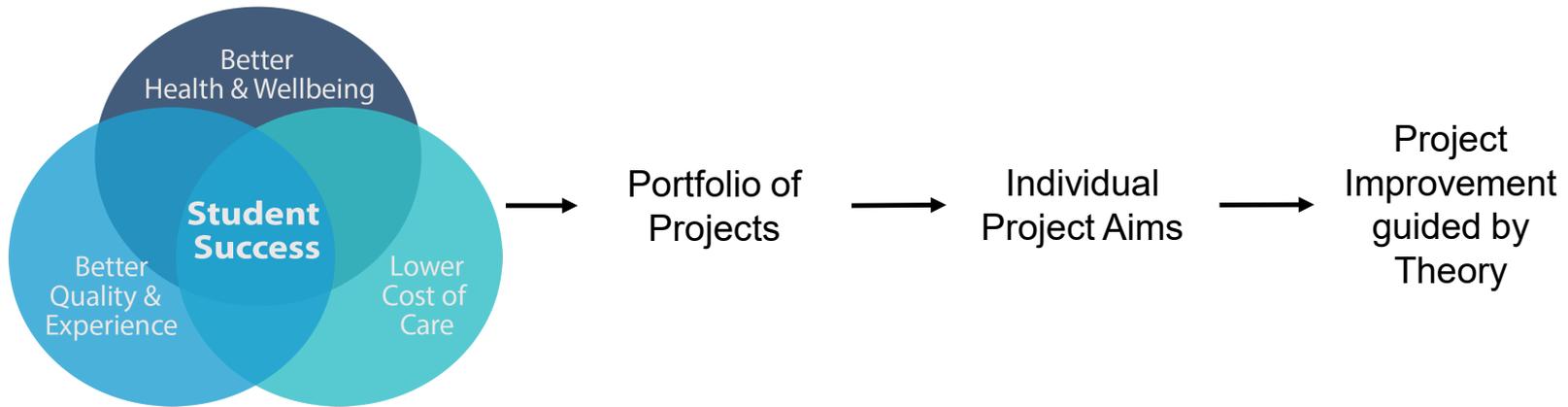
Key leverage points in the system

Specific ideas or concepts that could generate the desired state

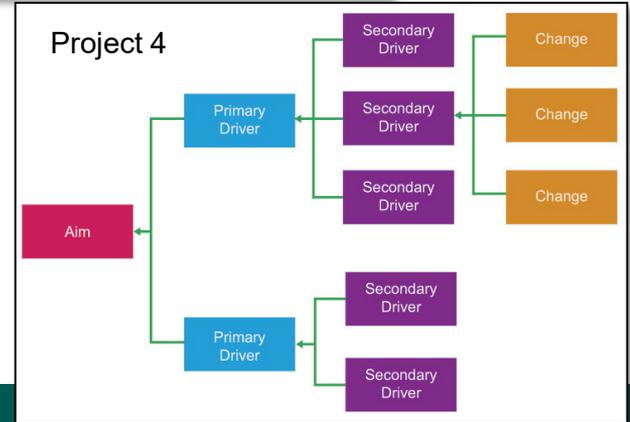
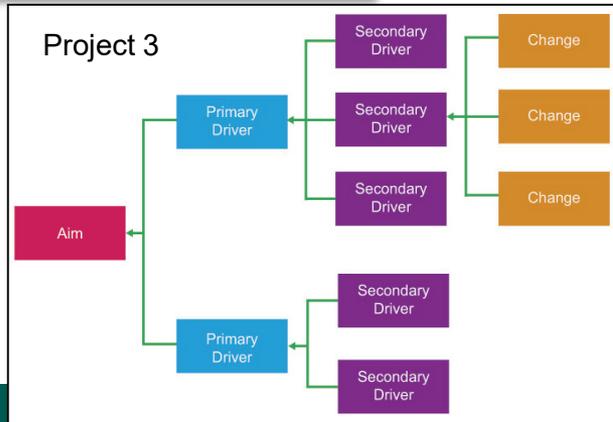
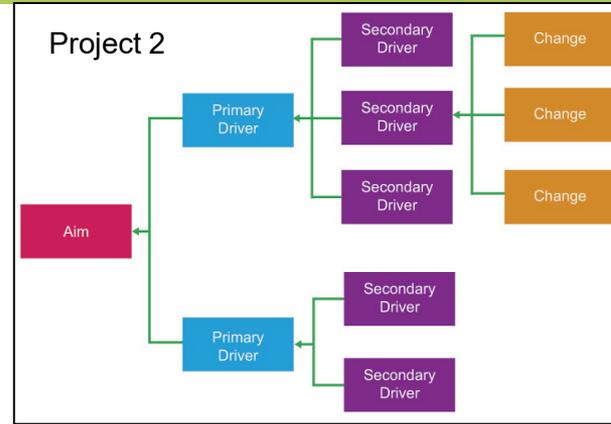
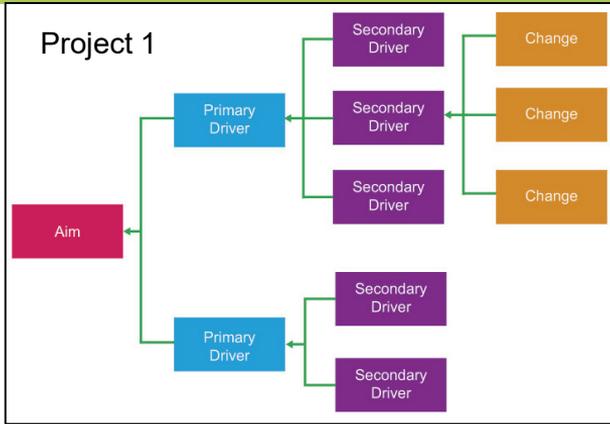
**TESTING YOUR THEORY & BUILDING KNOWLEDGE**

Adapted from Bennett and Provost 2015

# Returning to TAIHE

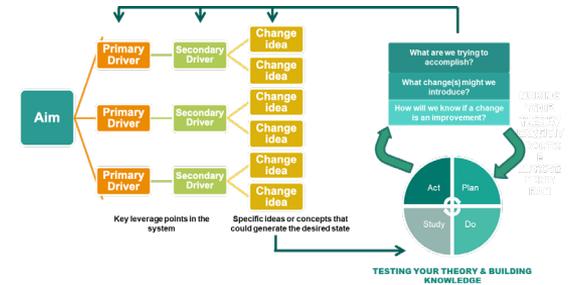
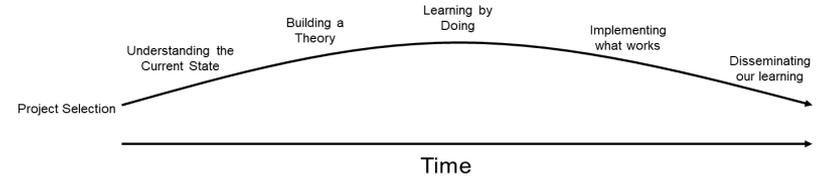
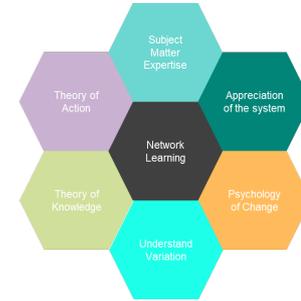


# TAiHE



# Discussion Questions

1. What do you notice?
2. What are you wondering about?
3. What makes sense?
4. What is confusing?



*Refer to the Breakout  
Session Task Card in the  
chat.*

**Your task:** Have a small group discussion about the questions referenced on the task card.

**Product:** One insight to share to the whole group

1. Introductions and assign roles
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# Breakout discussions in progress.



# Welcome Back!

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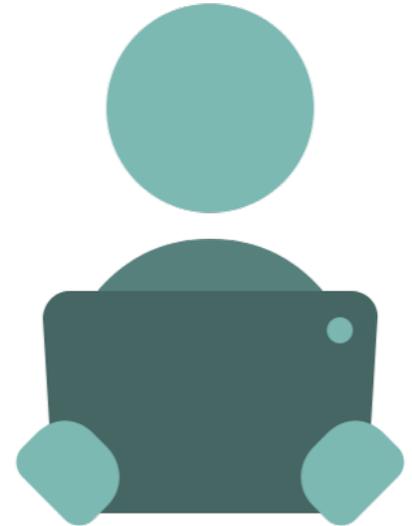
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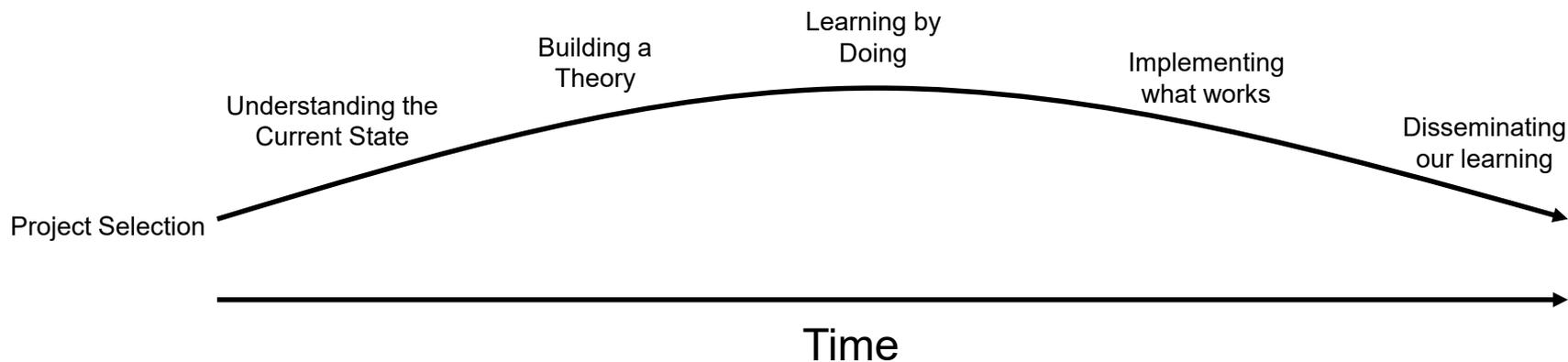


# Whole Group Discussion



# Part 2 – Enacting a Theory of Action

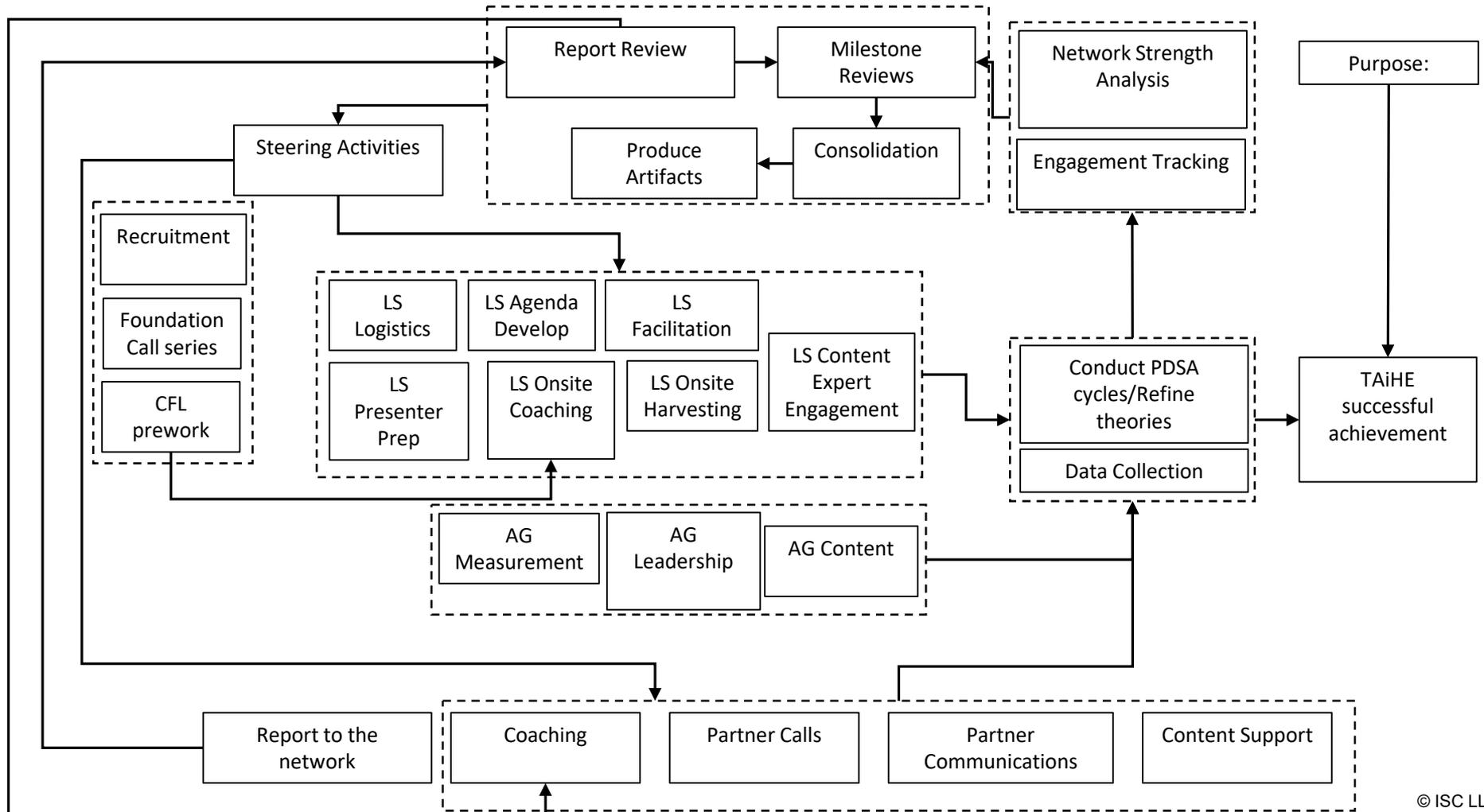
# Arc of an Improvement Journey



How do we get all this to happen?

Triple Aim in Higher Ed LoP v1.1

AG= Action Group LS= Learning Session



# What is a Theory of Action?

## Learning System

Provides the logistical and pedagogical environment in which improvement can occur

Contains and Incorporates:

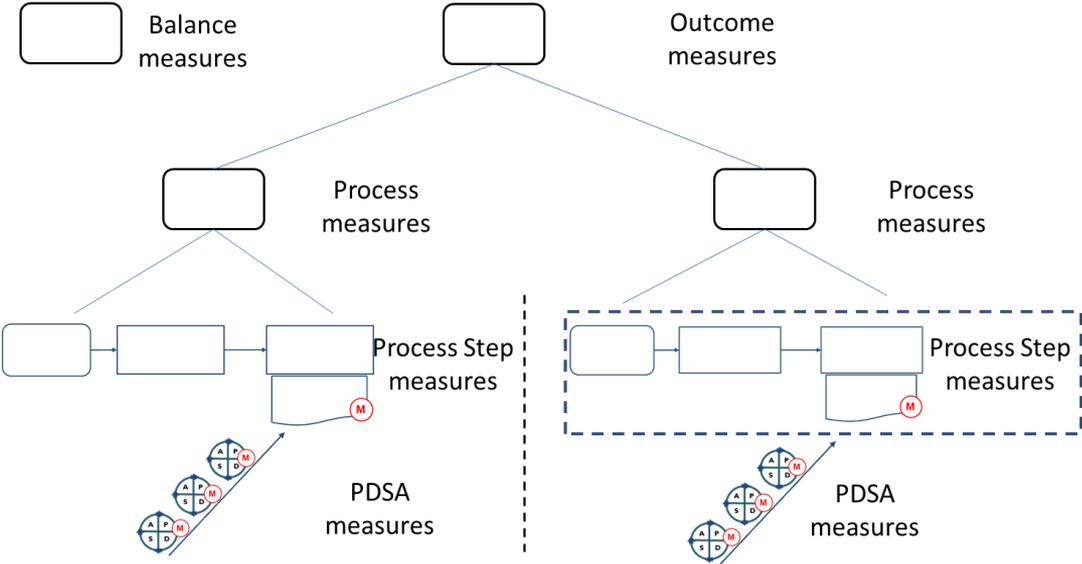
- Structural elements
- Measurement: content and engagement
- Necessary supports for improvement teams
- Opportunities for review, reflection and course correction
- Moments for consolidation of learning

# Structural Elements

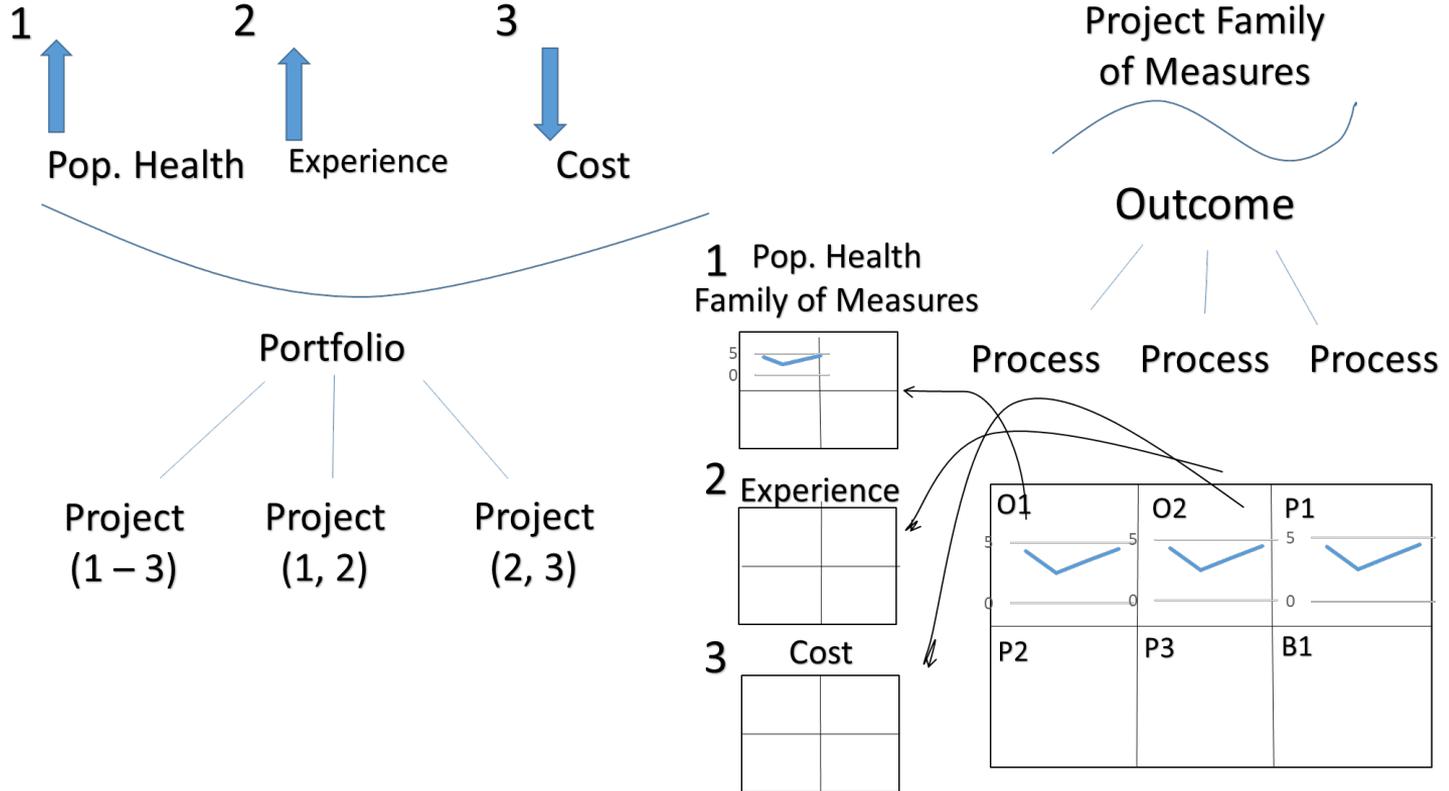
1. Design of the work – what will the structure of improvement look like?
2. Will it include team meetings?
  - How often?
  - Who attends?
  - What constitutes a quorum?
3. Will there be Learning Sessions?
  - How many?
  - How far apart?
  - In-person or virtual?
4. Will there be online engagement?
  - Provision of tools?
  - Cloud based portal?
  - Web based data submission?

# Measurement – Content

- I. Will be initiative specific and tied to the outcome of interest
- II. Described as a family of measures



# TAiHE Content Measurement

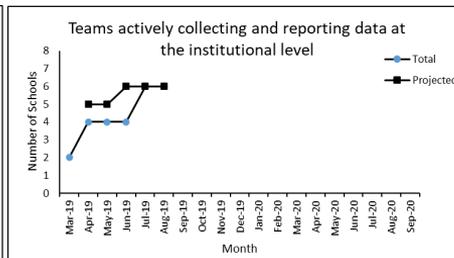
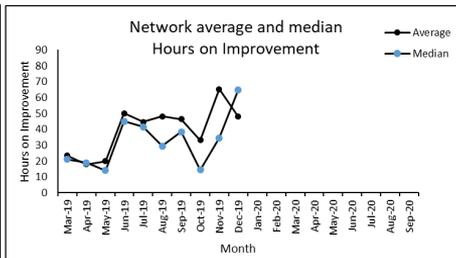
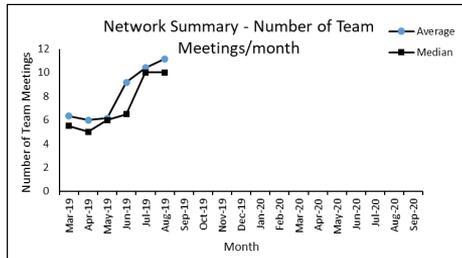
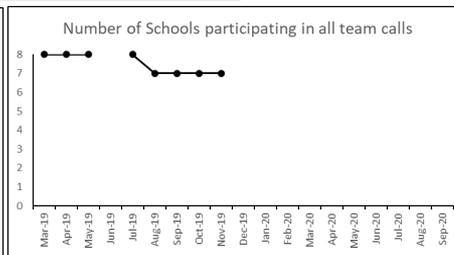
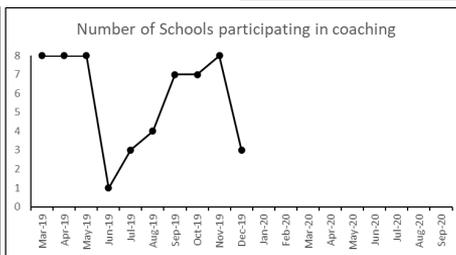
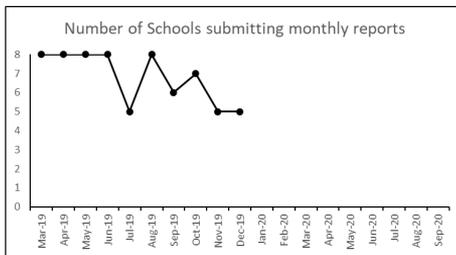
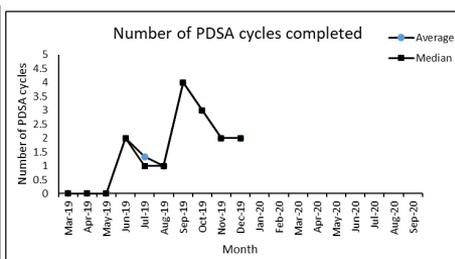
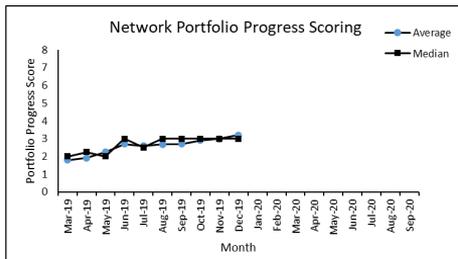


# Measurement – Engagement

Could include:

- Number of Improvement Team Meetings
- Number of hours spent on Improvement Activities
- Submission of a monthly report
- Project Progress Score
- Participation in coaching sessions
- Participation in All Team calls
- Measure of senior leader engagement

# TAiHE Engagement Data



# Supports

How will the work of improvement be supported?

Possible mechanisms include:

- Coaching – calls or in-person
- Coaching – Improvement and Content
- Feedback on artifacts – frequency?
- Check-ins with Sponsors/Senior Leaders
- Provision of resources

# Review and Course Correct

## Improvement Reviews

Periodic mechanism where consolidated work/learning is presented to both content and improvement experts for analysis, comment, and critique

Intention is to provide improvement with any necessary advisement regarding direction or momentum associated with the improvement journey

# Consolidation

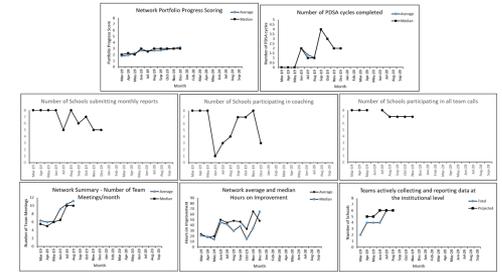
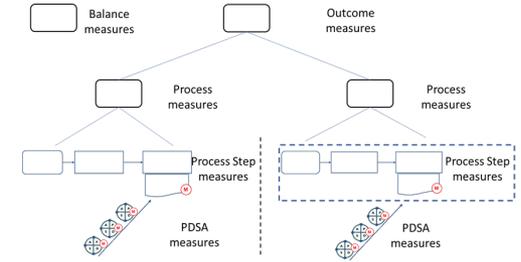
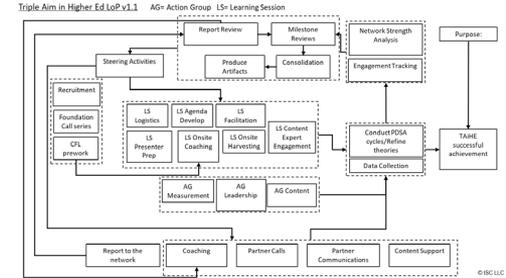
Periodically teams should pause to reflect on the learning they have experienced to date

Effort is taken to make meaning from the learning, updating:

- Theory of practice improvement – Driver Diagram
- Measures, revisiting analysis and revisiting data conversations on the variation present in the data collected

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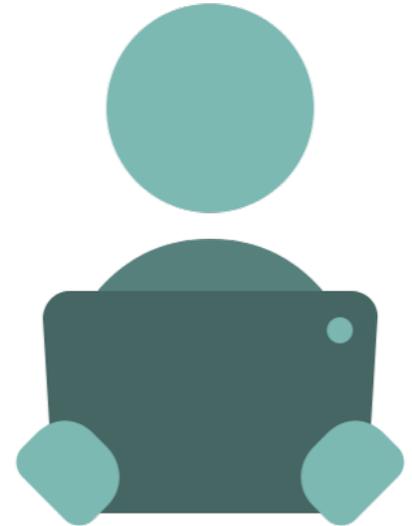
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# Whole Group Discussion



# Opportunity for Open Discussion and Questions

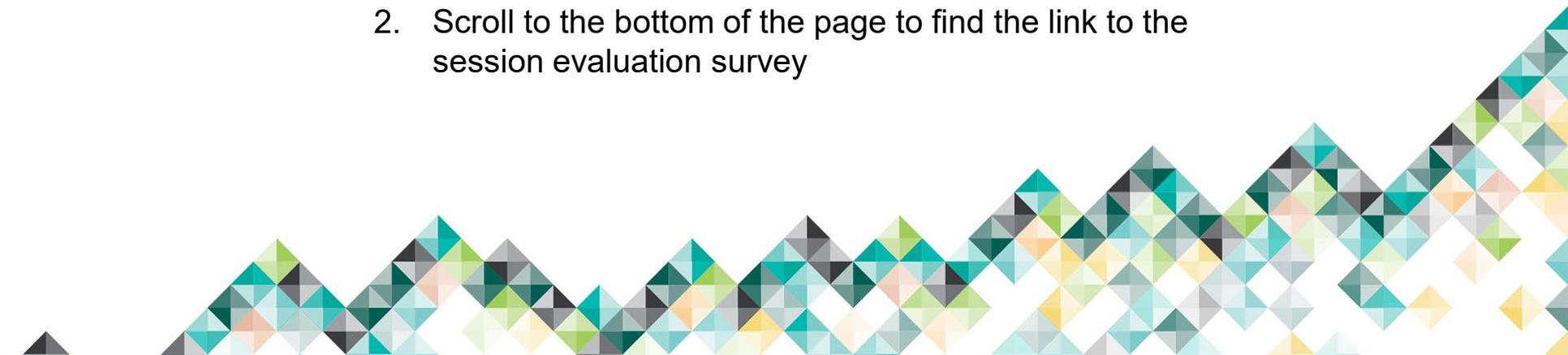


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