Developing a Quality Assurance Plan

Hosted by
Who We Are

Capacity for Health at APIAHF, a Capacity-Building Assistance Program, with offices in San Francisco and Washington, DC
Our Technical Assistance

Our program is funded by the Centers for Disease Control and Prevention (CDC) to provide free trainings and one-on-one technical assistance for community-based organization (CBOs) on:

- Organizational Infrastructure and Program Sustainability;
- Evidence-Based Interventions (EBIs) and Public Health Strategies; and
- Monitoring and Evaluation.
Housekeeping

• All participants are automatically muted by webinar administrators.

• If your audio is through a telephone, please make sure to enter your audio PIN, otherwise we are unable to unmute you.

• You may ask questions by typing them in using the chat feature.

• For discussion, please “raise” your hand. You will be called on and un-muted so that you can ask your question live.

• If anyone is watching the webinar with multiple people around one computer, please chat in your contact information so that we can include you on any follow up.

• Today’s webinar will be recorded. The recording will be available on our website.
Melissa Werner, MPH, MAT

Melissa specializes in health education, training, and curriculum development. She has worked with national and local HIV prevention, counseling, and testing programs, and has provided technical assistance for HIV prevention community planning groups.

When she's not working, Melissa enjoys belly dancing, knitting, and scuba diving—but never at the same time.
Goal
Objectives

By the end of this webinar, participants will be able to:

• Define quality assurance (QA) and explain its importance;
• Describe how a QA plan fits into an overall quality assurance program;
• Identify the major elements of a comprehensive QA plan;
• Report confidence to develop a QA plan; and
• Identify at least one QA strategy to implement in their organization.
Today’s Agenda

• Introduction to QA

• Elements of QA Plan

• Additional Resources
Poll: QA in Your Organization

1. Do you currently have a person (or people) in your organization who is (are) responsible for quality assurance activities?

   AND

2. Does your organization have a QA plan?

   - No to both
   - Yes QA person and No QA Plan
   - No QA person and Yes QA Plan
   - Yes to both
   - I don’t know
Introduction to QA

Quality Assurance

Webinar: Developing a QA Plan
What Is Quality?
Definition: Quality

“the degree to which health services for individuals and populations increase the likelihood of desired health outcomes and are consistent with current professional knowledge.”

**quality assurance** *noun 1.* a program for the **systematic** monitoring and evaluation of the various aspects of a project, service, or facility to ensure that **standards** of quality are being met

*Source:* Merriam-Webster Online
Quality Assurance Components

Definition: Standard

STANDARDS
Definition: Standard

- Set by accrediting agencies
Definition: Standard

- Set by accrediting agencies
- Set by funders
Definition: Standard

• Set by accrediting agencies
• Set by funders
• Our own criteria for quality
Your Standards Here
Quality monitoring is the planned, systematic, and ongoing collection of data (information).

Quality Assessment

Measurement of the level of quality at some point in time as compared to your standards.

Quality Improvement

Making your program better with the intent of meeting and exceeding customer expectations and outcomes

Poll: The Benefits of QA

Which of the following are potential benefits of QA?

- Improved program delivery
- Greater client satisfaction
- Lower program costs
- Greater intra-agency communication
- The QA plan will look nice sitting idly on the shelf in your office
Benefits of QA

- Improve program delivery
- Improve client satisfaction
- Lower program costs
- Encourage communication
- Define your quality standards
- Build buy-in
- Impress funders!

Webinar: Developing a QA Plan
Elements of a QA Plan

- Staffing
- Interventions
- Client Interactions
- Data
- Clinical Services
Staffing

- Experience/qualifications
- Recruitment
- Training
- Professional development
- Supervision and assessment
Case Study: Introduction

Community-based organization providing:

- HIV-antibody counseling and testing
- Case management
- HIV prevention interventions for multiple target audiences, including women of color and men who have sex with men.
Case Study: Staffing

Experience and Qualifications: “For each staff position, we develop a detailed job description...”

Recruitment: “We routinely recruit staff through a variety of channels...”
QA Plan Element: Interventions

- Selection of interventions
- Needs assessment, pilot testing, and evaluation
- Process for adaptation
- Implementation

Webinar: Developing a QA Plan
Case Study: Interventions

Pilot testing: “We pilot test all of our selected EBIs with members of the target audience...”

Adaptation: “While we may ‘tweak’ Interventions based on pilot-test findings, we make sure to keep the core elements of the interventions intact—and always seek out technical assistance...”
QA Plan Element: Client Interactions

- Assessing client satisfaction
- Emergency situations
- Informed consent
- Referrals to other services
- Ethics of staff/client relationships
Case Study: Client Interactions

Client Satisfaction: “We use a client satisfaction survey that we adapted from another community-base organization...”

Ethics of Staff/Client Relationships: “Our policies and procedures manual contains a policy prohibiting sexual relationships between staff and clients...”
QA Plan Element: Data

- Confidentiality policy
- Security of records
- Quality checks
- Reporting
- Chart reviews
Case Study: Data

Security of records: “All hard-copy files are kept in a locked filing cabinet in a locked office...”

Quality checks: “When entering data, we use a two-step process for checking the quality of our data...”
QA Plan Element: Clinical Services

- Test-kit storage
- Universal precautions
- Confirmatory testing
- Handling biohazardous waste
**Test Kit Storage:** “As directed by the manufacturer of the OraQuick® Rapid HIV-1 Antibody Test, we store test kits at 2°C to 27°C (35°F to 80°F). The HIV Testing Manager will check and record the temperature daily on a log in the lab.”

**Universal Precautions:** “We handle all specimens and materials contacting specimens according to OSHA blood borne pathogens standard. All new staff are trained on universal precautions during new employee orientations...”

Who Develops the QA Plan?

A multi-disciplinary team:
- Cross-fertilization
- Buy-in
Writing up Your QA Plan

- Introduction
- Work Plan
- Distribution
### Case Study: Workplan

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<tr>
<th>Activity</th>
<th>Person(s) Responsible</th>
<th>Timeframe</th>
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<td><strong>Staffing</strong></td>
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<td><em>Example:</em> Conduct thorough one-on-one training with new hires on organizational history, vision, and mission; all items in policies and procedures manual; and office procedures (e.g., copier codes, mailroom, card keys).</td>
<td>HR Manager</td>
<td>Ongoing when new staff are hired</td>
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<tr>
<th>Interventions</th>
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<td><em>Example:</em> Observe each intervention using a checklist of core elements and other assessment items.</td>
<td>Prevention Manager</td>
<td>Quarterly</td>
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<tr>
<th>Client Interactions</th>
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<td><em>Example:</em> Review Policy Manual section on urgent/emergency situations, such as suicidality, alcohol or substance use on site, and update as necessary.</td>
<td>Case Manager</td>
<td>Annually</td>
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**Webinar: Developing a QA Plan**

**C4H**

**Capacity for Health**
Putting It All Together

Webinar: Developing a QA Plan
Bright Ideas

What new idea will you take away from today’s webinar?
Additional Resources

http://www.apiahf.org/resources/webinar-developing-quality-assurance-plan

• QA Plan
• Informational Sheet
• QA Plan Template
Still More Resources

Slides and a recorded version of this webinar will be available on our website at www.capacity4health.org

Contact us for individualized capacity-building assistance
Sonya Dublin, Capacity for Health
415-568-3335, sfdublin@apiahf.org

We will be following up for your feedback!

Thank you!