



Name of Organization: ABC Treatment Agency

**PROJECT CHARTER**

|   |  |
|---|--|
| 1. <b>CHANGE PROJECT TITLE</b>  | Reduce no-shows  |
| 2. What <b>AIM</b> will the Change Project address?<br>Choose one aim and indicate baseline measure and target. | Reduce no-shows to the assessment appointment from 45% to 25%.   |
| 3. <b>LOCATION</b>  | Main Office, Los Angeles, CA   |
| 4. <b>START DATE</b> and expected completion date   | 2/2/09 – 5/2/09  |
| 5. <b>LEVEL OF CARE</b>   | Outpatient   |
| 6. What <b>CLIENT POPULATION</b> are you trying to help, e.g. clients in a specific program?                    | Adult clients in Proposition 36 program  |
| 7. <b>EXECUTIVE SPONSOR</b>   | John Smith   |
| 8. <b>CHANGE LEADER</b>   | Nancy Jones  |
| 9. <b>CHANGE TEAM MEMBERS</b>   | Al Rodriguez - Counselor; Audrey White - Receptionist; Susan Locks - Office Manager  |
| 10. How will you <b>COLLECT DATA</b> to measure the impact of change?   | We will keep a log of scheduled assessment appointments for the week and will indicate (with a check mark) whether the client showed up for their appointment.           |
| 11. What is the expected <b>FINANCIAL IMPACT</b> of this change project? How will the Executive Sponsor know?   | Increased revenue: The more clients who show for their assessment appointments means the more assessments we will get reimbursed for from the county at \$65/assessment. |

**PDSA CYCLES**

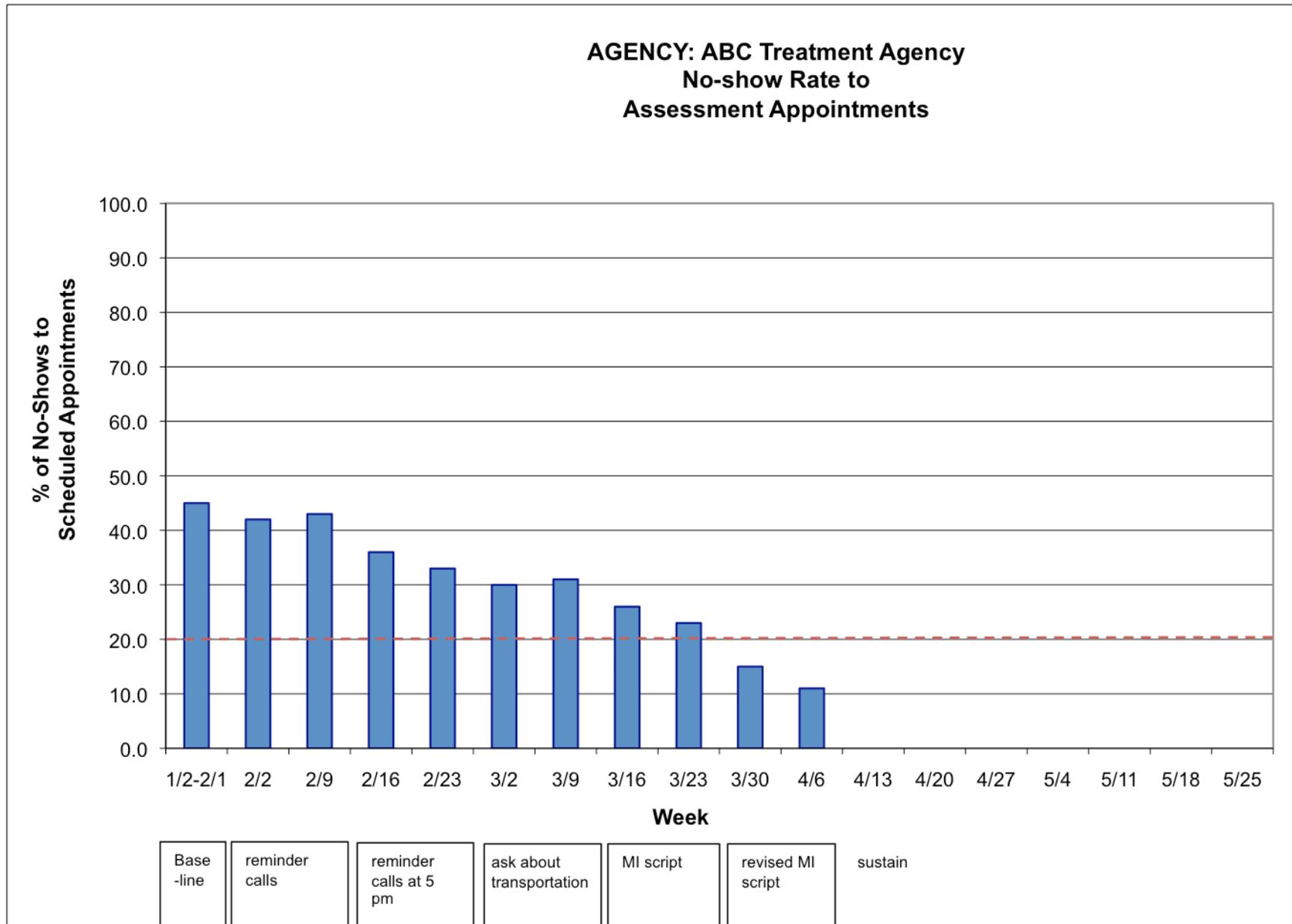
| <b>Rapid Cycle #</b> | <b>Cycle Begin Date</b> | <b>Cycle End Date</b> | <b>Plan</b><br><i>What is the idea/change to be tested?</i>              | <b>Do</b><br><i>What steps are you specifically making to test this idea/change? Who is responsible?</i>  | <b>Study</b><br><i>What were the results? How do they compare with baseline measure?</i>   | <b>Act</b><br><i>What is your next step? Adopt? Adapt? Abandon?</i>   |
|----------------------|-------------------------|-----------------------|--|---|--|---|
| 0                    |                         |                       |  |   | 1/2/09-2/1/09: Baseline no-show rate = 45%   |   |
| 1                    | 2/2/09                  | 2/15/09               | Make reminder phone calls for scheduled assessment appointments.         | The receptionist will ask clients if they'd like a reminder call and if it's ok to leave a message. She will make reminder calls for assessment appointments 2 days in advance and if needed, will reschedule appointments.                   | 2/2-2/8: No-show rate = 42%<br>2/9-2/15: No-show rate = 43%<br><br>Most reminders were left as messages.   | ADAPT: Make reminder calls between 5-6 pm, when reaching a live person is more likely.  |
| 2                    | 2/16/09                 | 3/1/09                | Make reminder phone calls for scheduled assessment appointments at 5 pm. | The receptionist will make reminder calls for assessment appointments at 5 pm.  | 2/16-2/22: No-show rate = 36%<br>2/23-3/1: No-show rate = 33%<br><br>2 clients called to cancel at the last minute, saying that they didn't have any transportation. | ADOPT: Continue making reminder calls and also start asking how clients will get to the assessment appointment during the first contact call. |
| 3                    | 3/2/09                  | 3/15/09               | Ask about transportation during first contact call.                      | At the end of the first contact call, after scheduling the assessment appointment, the receptionist will ask how the client will get to the appointment and help them think through the logistics, including public transportation schedules. | 3/2-3/8: No-show rate = 30%<br>3/9-3/15: No-show rate = 31%  | ADOPT   |
| 4                    | 3/16/09                 | 3/29/09               | Use spirit of MI script during first contact call                        | Receptionist will create script that includes open-ended questions so first contact is more conversational and personal.  | 3/16-3/22: No-show rate = 26%<br>3/23-3/29: No-show rate = 23%   | ADAPT: Re-order and re-word questions so they flow more easily and retest.  |
| 5                    | 3/30/09                 | 4/12/09               | Revise MI script to flow more smoothly                                   | Receptionist will revise script so it flows more smoothly.  | 3/30-4/5: No-show rate = 15%<br>4/6-4/12: No-show rate = 11%   | ADOPT   |

### EVALUATION AND SUSTAIN PLAN

| Project Outcomes (only complete once the project is finished)   |   |
|---|---|
| 1. What was the project <b>END DATE</b> , when you stopped making changes?  | 4/12/09   |
| 2. What did you <b>LEARN</b> (e.g., what were some unexpected outcomes or lessons learned from your change efforts)?                | Reminder calls allowed us to reschedule appointments and offer slots that opened up to others. Even though we couldn't offer transportation, helping clients think through the logistics gave them the opportunity to figure out how they would get to the agency. Making the 1 <sup>st</sup> contact call more conversational and personal was more satisfying for the receptionist. |
| 3. What was the <b>FINANCIAL IMPACT</b> of this change project? (e.g. Increased revenue? Reduced costs? Increased staff retention?) | Revenue from assessment appointments increased from \$650 for 10 assessments in January, to \$1040 for 16 assessments in April.   |

| Sustainability Plan (only complete if you are sustaining the changes)  |  |
|--|--|
| A. Who is the <b>SUSTAIN LEADER</b> ?  | Aubrey White - Receptionist  |
| B. What <b>CHANGES</b> do you want <b>TO SUSTAIN</b> ?   | Reminder calls; Conversational script during first contact, including asking about transportation  |
| C. What <b>SUSTAIN STEPS</b> are being taken to ensure that the changes stay in place and that it is not possible to revert back to the old way of doing things? | Add reminder calls and script to policy and procedure manual and receptionist's job description. Schedule making reminder calls every day at 5 pm is on receptionist's calendar.                     |
| D. What is the <b>TARGET SUSTAIN MEASURE</b> , i.e. the point at which the Change Team would intervene to get the project back on track?                         | If the assessment no-show rate increases above 20%, we will do a walk-through to make sure all the changes are still being made and the Change Team will reconvene to get the project back on track. |
| E. What system is in place to effectively <b>MONITOR</b> the <b>SUSTAIN MEASURE</b> ?  | Aubrey will continue to track attendance at scheduled appointments on the log and calculate the no-show rate monthly.  |

Additional Notes:



Reduce Waiting & No-Shows • Increase Admissions & Continuation