

Quality Improvement (QI) Objective 6

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Overview

This document explains the purpose of a **QI plan, case study, and storyboard**. It offers information and resources including templates for Local Oral Health Programs (LOHPs) to submit.

Objective 6: Assess, support, and ensure establishment of effective oral healthcare delivery and care coordination systems and resources, including workforce development, language services, collaborations, and processes that support continuous quality improvement to serve underserved areas and vulnerable populations.

Activity 6.4.b (A)

Develop **QI plan** in partnership with Community of Practice.

Activity 6.4.e

Conduct quality improvement projects in partnership with Community of Practice.

A) Qualitative case study 6.4.e (A)

B) QI storyboard 6.4.e (B)

*Any activity conducted under Objective 6 qualifies as an area of focus for QI efforts.

Introduction

Quality Improvement (QI) is an ongoing, systematic, and data-driven approach used to enhance the effectiveness, efficiency, and equity of oral healthcare delivery and care coordination systems and resources. In oral health delivery systems, QI is essential for addressing disparities, improving access to care, and ensuring services meet the needs of diverse and underserved communities. Many populations face barriers such as limited provider availability, language access challenges, and gaps in culturally competent care, leading to preventable oral diseases and reduced quality of life.

A **QI plan** provides a structured framework to identify performance gaps, apply evidence-based interventions, and monitor progress over time. It integrates performance management activities with community feedback to guide initiatives that support population health improvement. This approach promotes accountability and collaboration.

QI case studies and **QI storyboards** support this work by documenting and communicating improvement efforts. A QI case study offers an in-depth understanding of real-world experiences and factors influencing the initiative, while a QI storyboard presents the same information in a concise, visual format. Together, they highlight the problem or opportunity, methodologies used, key data and metrics, lessons learned, and steps within the Plan-Do-Study-Act (PDSA) cycle to sustain improvements.

6.4.b(A) QI Plan Instructions

These instructions support LOHPs in planning and executing a QI plan. Each LOHP should tailor the components to meet the specific needs of their oral health program. Please use the provided template.

Submission instructions:

- Name the file: *County Name _ QI Plan 6.4.b(A)*
- Submit the QI plan into the LOHP SharePoint site

QI Plan Template

Insert your LOHP's QI plan information in boxes below.

Executive Summary	<p>Briefly summarize the contents of your plan and what you plan to and have accomplished with Objective 6.</p> <p>This summary can be written after the rest of plan is complete.</p>
Problem Statement	<p>Define issue to address and why it matters.</p>
SMART Aim Statement	<p>Describe goals and objectives for the QI project. Goals are broad statements describing the desired long-term outcome. Objectives are specific, measurable steps to achieve those goals, breaking them into actionable parts with a timeline.</p> <p>Objectives should be: Specific, Measurable, Achievable, Relevant, Time-based, Inclusive, and Equitable (SMARTIE).</p> <p>Process example:</p> <ul style="list-style-type: none"> • By (date), LOHP will pilot a referral management system that implements warm handoffs, and coordinated appointments between dental and medical teams.
Roles & Responsibilities	<p>Provide overview/list if applicable:</p> <ul style="list-style-type: none"> • Describe roles and responsibilities • Identify key partners (executive sponsors, frontline staff, community partners) • Additional support received (administrative, training, IT, technical assistance, specialists, consultants, etc.)

Data & Measurement Plan	Explain how the data for the plan will be monitored, reviewed, evaluated, and updated.
Quality Improvement Methodology	<p>Name and briefly describe the QI methodology to be utilized in the project.</p> <p>Examples:</p> <ul style="list-style-type: none"> • Plan Do Study Act (PDSA) • LEAN • Process Mapping

6.4.e (A) QI Case Study Instructions

These guidelines assist LOHPs in designing and conducting a qualitative case study. Each LOHP should adapt the steps to fit their program’s unique requirements. Please use the provided template.

Submission instructions:

- Name the file: *County Name _ QI Case Study 6.4.e(A)*
- Submit the QI case study into the LOHP SharePoint site

QI Case Study Template

Steps	Overview
1. Define the Case(s)	<p><i>What is the area of focus for the case study?</i></p> <p>To define the cases in the qualitative study, choose specific communities, clinics, or programs that represent the settings or populations interested to learn from, these are the “cases.”</p> <p>Examples:</p> <ul style="list-style-type: none"> • A fluoride varnish training program for medical providers or community health workers. • A rural dental clinic piloting a bilingual care coordination model. • An urban community health center integrating oral health into primary care. • A tribal health program implementing workforce development for dental community health representatives.

<p>2. Develop QI Questions</p>	<p><i>Include questions that were asked.</i></p> <p>Create questions that guide data collection and analysis. Start with the project’s main goal, identify key focus areas (e.g., care coordination, language access, workforce), then draft open-ended questions using “how,” “what,” or “why.” Refine and prioritize the questions with partner input to ensure clarity and relevance.</p> <p>Examples:</p> <ul style="list-style-type: none"> • How are oral health services currently delivered and coordinated? • What are the barriers and facilitators to effective care coordination? • How are language services integrated into oral health delivery? • What workforce challenges exist, and what strategies address them?
<p>3. Data Collection Methods</p>	<p>Use mixed qualitative methods: interviews, focus groups, document review, observations to gather deep insight. Select participants directly involved in or affected by public health programs or oral healthcare delivery. Use open-ended, flexible tools to explore experiences and perspectives.</p> <p>Examples:</p> <p>Interviews: dental providers, care coordinators, patients, community health workers, program administrators</p> <p>Focus groups: community members, healthcare staff</p> <p>Document review: QI plans, training materials, workflows, language access protocols</p> <p>Observations: clinic workflows, team meetings, patient-provider interactions (with consent)</p> <p>Sampling strategy: include individuals closely connected to oral health delivery and coordination</p>
<p>4. Data Analysis</p>	<p><i>What were themes and patterns observed? Did anything stand out?</i></p> <p>Review notes or transcripts and highlight key ideas or repeated concepts. Group related points into themes that help explain experiences and perspectives. Look for patterns,</p>

	<p>differences, and insights that address the research questions and inform quality improvement.</p> <p>Possible themes: communication gaps, cultural/linguistic barriers, workforce innovations, QI best practices, community engagement strategies</p>
<p>5. Dissemination</p>	<p><i>What are the plans for sharing data/findings?</i></p> <p>Share findings through storyboards, presentations, reports, summary briefs, etc. Ensure the information is accurate, practical, and grounded in the results. Refer to the Dissemination Plan Instructions as needed.</p> <p>Examples of audiences: Communities of Practice, local health departments, policymakers, oral health coalitions, advisory committees, etc.</p> <p>Examples of use: identify/develop toolkits or best practices, advocate for policy changes</p> <p>Develop QI storyboard 6.4.e(B)</p>

6.4.e(B) QI Storyboard Instructions

This guidance supports LOHPs in creating a QI storyboard to accompany their QI case study. Each LOHP should tailor the components to meet the specific needs of their oral health program. Please use the provided template.

Submission instructions:

- Name the file: *County Name _ QI Storyboard 6.4.e(B)*
- Submit the QI storyboard into the LOHP SharePoint site

PDSA (Plan-Do-Study-Act) Cycle

The PDSA (Plan-Do-Study-Act) cycle is a four-step, iterative model for testing and implementing changes, aimed at improving processes and/or services. It encourages small scale, rapid testing to learn what works best before implanting changes on a larger scale.

Key Components of the PDSA Cycle

- **Plan:** Identify an objective, ask questions, make predictions, and plan the data collection to test a change.

- **Do:** Implement the plan on a small scale (e.g., testing with one patient, one day, or one department) and document observations, including unexpected outcomes.
- **Study:** Analyze the data collected, compare results against predictions, and summarize the learning.
- **Act:** Determine what modifications to make, plan for the next cycle, or implement the change on a broader scale if successful.

QI Storyboard Template

<p><i>Insert LOHP/ County Logo</i></p>		
<h3>Project Title</h3> <p>What You Accomplished and Who Benefits</p>		
<p>Background (Plan)</p> <ul style="list-style-type: none"> • What is the issue and why is it important? • Describe the problem(s) before you did the project. • What issues were experienced and how did it affect the work? • Consider answering “who, what, where, when, why, and how” to describe the problem. 	<p>[Insert image related to project]</p> <p>Example: picture participants doing surveys/focus groups, event photos, image of data collection tools, etc.</p>	<p>Lessons Learned (Act)</p> <ul style="list-style-type: none"> • Write a brief description of key takeaways from the project. Reflect on study and findings. • Activities/plan to address the problem. • List potential actions for next steps. • Plans for additional improvements.
<p>Actions/Activities/Approach (Do)</p> <ul style="list-style-type: none"> • Summarize the steps you took to complete the project. Describe how you collected and used data, which quality improvement tools were used, what intervention or change was implemented, and how and which partners were involved in the case study. • Activities to address the issue/problem. 	<p>Results (Study)</p> <ul style="list-style-type: none"> • What were themes and/or patterns identified? • Report observations from the data analysis. • Identify any differences, and insights that relate to the research questions that can guide improvements. • What potential improvements/changes were identified. 	<p>[Visual representation of information, data, or knowledge pertaining to study]</p>
<p><i>Name of Creators</i> <i>Funded by the CDPH under Grant XX-XXXX</i></p>		

Additional Resources

QI Concepts

1. [Quality Measurement and Quality Improvement \(CMS\)](#)
2. [Evaluation and Quality Improvement \(ASTDD\)](#)
3. [Oral Health Quality Improvement Resources \(Medicaid\)](#)
4. [What is Results-Based Accountability? \(Clear Impact\)](#)
5. [Results-Based Accountability \(OOH/COHTAC\)](#)

QI Frameworks, Models, and Methodologies

6. [Model for Improvement and PDSA Cycles](#)
7. [PDSA: Plan-Do-Study-Act \(MN Dept. of Health\)](#)
8. [Lean Essentials \(MN. Dept of Health\)](#)
9. [Continuous Quality Improvement Toolkit \(IHS\)](#)

Planning and Process Design

10. [Collecting and Analyzing Qualitative Data \(CDC\)](#)
11. [Writing SMARTIE Objectives \(CDC\)](#)
12. [Process Mapping with Swim Lanes \(MN Dept. of Health\)](#)

QI Storytelling, Dissemination and Communication

13. [Quality Improvement Storyboard \(MN Dept. of Health\)](#)
14. [QI Storyboard Template Example](#)
15. [Dissemination/Communication Plan Instructions \(OOH\)](#)