



Hosting a Learning Collaborative: A Toolkit

Center for Accelerating Care Transformation

Introduction

How can this toolkit help you?

This toolkit provides easy access to the knowledge and tools necessary to design, execute, and evaluate a high-quality learning collaborative. It can be used as a training manual, a reference guide, or as a refresher for those who already have experience with learning collaboratives. The tools included here can be applied to a wide range of improvement initiatives in health care or public health settings.

What is a learning collaborative?

A learning collaborative is an initiative in which teams of peers come together to study and apply quality improvement methods to a focused topic area. Learning collaboratives are a key tool that our team has used for more than 20 years to promote patient-centered, team-based care.



Learning collaboratives have a long history in educational settings but were first adapted for health care organizations by the Institute for Healthcare Improvement (IHI) in 1994. IHI's model of learning collaboratives helps organizations apply known improvement principles to current health care practices with the goal of achieving "breakthrough improvements in quality while reducing costs." Learning collaboratives in the Breakthrough Series model generally include these features:



4-8 clinic teams working together for 12-18 months



At least 3 expert-led learning sessions



Tests of change between learning sessions



Monthly reporting and interim calls

Notes on using this toolkit

- This toolkit is a collection of suggestions, tools, tips, and tricks based on our many years of experience with learning collaboratives.
- It is meant to serve as a guide to developing and running a learning collaborative. It is not a prescriptive step-by-step manual.
- The tools provided come from a variety of organizations and can be customized to meet your project needs.
- **If you have questions about using this toolkit,** please contact ACT-Center@kp.org



Learn more on the IHI website: [The Breakthrough Series: IHI's Collaborative Model for Achieving Breakthrough Improvement](#)

Overview of toolkit

The content of this toolkit is organized around 5 key phases of work involved in launching and sustaining a successful learning collaborative. Within each phase, the toolkit links to helpful resources and includes real-world tips to help you move your work forward. You can jump to any section in the toolkit by clicking on the headings below:

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How to spot linked tools & resources



The toolbox icon will point you to **tools and resources** embedded in the toolkit. You may also [jump straight to the toolbox](#).



The lightbulb icon indicates **real-world tips** drawn from direct experience with learning collaboratives.



The document icon will direct you to **example materials**.



The “click” icon will point you to **external resources** and background information that may be helpful.

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1 Plan the Learning Collaborative

Step 1: Brainstorm the general purpose of the collaborative

Before starting to plan a learning collaborative, take some time to think about the answers to these questions:

- What is the general purpose of the learning collaborative?
- Are the resources available to plan, implement, and sustain this activity?
- Is the necessary buy-in from key stakeholders in place?
- Who will lead the planning of the learning collaborative?

If the collaborative topic is relatively complex and you are concerned about the focus, scope, or feasibility of the learning collaborative, consider holding a preliminary factfinding meeting before beginning the planning process to get input from potential participants or partners in the collaborative. See [Phase 1, Step 4](#) for tips on soliciting input.

Step 2: Establish a planning group

This group's role is to help with strategic planning, solicit input from potential participants, generate buy-in from key stakeholders, and provide guidance during the planning process.

- Ensure that your planning group includes representatives from the organization hosting the collaborative, care teams, content experts, consumers, and the funder.
- Aim for 3-6 members total. A smaller group can be more effective, but you may need to expand your group to include all relevant stakeholders.
- Assign someone in the group to be responsible for project management and administrative support. This could be the same person or two different people.
- Establish ground rules for the group members, including clear expectations, roles, and responsibilities.



Use the Planning Group Member Matrix to help build your group.

1 Plan the Learning Collaborative

Step 3: Identify detailed objectives and goals

Once you have your planning group formed, work together to answer these questions:

- What is the purpose of the learning collaborative?
- What are the intended outcomes of participation in the collaborative?
- Who is the target audience for the learning collaborative?

Use this information to guide the rest of your planning process.

Step 4: Solicit input to plan the collaborative

It's critical to hear from potential participants, topic experts, and patients as you plan your learning collaborative. Here are some strategies for effectively getting input from, and staying connected with, people who can provide valuable feedback.



Conduct interviews or focus groups with individuals who may be candidates for participating and/or topic experts to identify specific change activities and barriers and facilitators to change. Solicit input from individuals who are responsible for or affected by various aspects of the process to be studied (e.g., leadership, care providers, case managers, patients, nurse managers, schedulers).



Consider hosting a factfinding or expert input meeting.

- At this meeting, present a preliminary description of the purpose and structure of the collaborative and request feedback. Ask participants to brainstorm possible barriers to collaborative recruitment and participation. Use this information to further refine the objectives and focus of the learning collaborative.
- To encourage attendance, consider hosting a short virtual meeting or covering travel expenses for an in-person meeting.



Keep an organized list of people who provide input on the collaborative. You may want to reconnect with them during the recruitment phase (to invite them to participate or to ask them to help spread the word about the collaborative).

1 Plan the Learning Collaborative

Step 5: Identify the faculty for the collaborative

The role of faculty in a learning collaborative is to provide expertise and help guide participants through the process of improvement.

Faculty may help plan and facilitate the learning sessions, give presentations during the collaborative, and/or serve as coaches for participating teams. Some faculty may be part of the planning group.

When choosing the faculty consider the following questions:

- Do they have relevant expertise in the content area?
- Do they have quality improvement skills?
- Do they have experience with previous learning collaboratives?
- Do they have the expertise and capacity to support, coach, and guide participating teams?
- Do they have facilitation and presentation skills?

Not every faculty member needs to meet all the criteria above, but the faculty should meet the criteria collectively. Faculty with less experience may be paired with more experienced faculty.

In addition to core collaborative faculty, you may invite guest faculty to share their expertise during one of the learning sessions.



Consider including a patient as faculty to help identify content, resources, and possible barriers and facilitators to implementing change.



Start thinking about who to include as guest speakers in your sessions early. These experts can have difficult schedules, so engage them early and be sure to have back-up options.

1

Plan the Learning Collaborative

Step 6: Designate coaches for the learning collaborative

Coaches support teams as they work to implement change and are critical to the success of the learning collaborative.

Coaches should be familiar with the peer learning process and have strong facilitation and quality improvement skills. Coaches may be part of the planning group and/or faculty.

Lay out clear expectations for the coaching role including the required time commitment. Consider:

- How many teams should each coach support?
- What types of support should coaches provide?
- How and how often will coaches work with teams?
 - Options include regularly scheduled coaching calls, technical assistance calls or meetings, one-on-one check-ins with teams, facilitated group chats, site visits, etc.



In some cases, individuals who are critical for planning a learning collaborative may not be best suited to provide ongoing support and facilitation.

1 Plan the Learning Collaborative

Step 7: Plan the learning collaborative meeting structure

With input from the planning group and faculty, decide how the learning collaborative meetings will be structured, including the length and timing of different types of meetings. Learning collaboratives typically have three types of meetings: 1) learning collaborative sessions, 2) coaching calls, and 3) technical assistance calls or meetings.



Learning collaboratives usually run for a duration of 12 to 18 months and include 3 to 4 sessions, including a Kickoff Session.



Coaching calls and technical assistance calls or meetings usually happen between sessions to maintain momentum and help teams problem solve.

Answer these questions to plan the meeting structure:

- How long will the learning collaborative run?
- How many sessions will the learning collaborative have?
- How much time will there be between collaborative sessions?
- How often will coaching calls and technical assistance calls or meetings take place?
- Will meetings be in-person, virtual, or a combination of both?
- How long will each type of meeting be?



Engage key stakeholders in the selection of important dates to avoid significant scheduling conflicts. You may need to develop a high-level agenda for each meeting to reserve time on the schedule of a content expert.



Once dates are set, immediately start to block off time on the calendar and begin to arrange logistics for these meetings.

1 Plan the Learning Collaborative

Step 7: Plan the learning collaborative meeting structure (continued)

Tips for planning the collaborative meeting structure:

- The number and types of meetings should reflect participants' needs and available resources (e.g., funding, staffing, conference space).
- Face-to-face meetings may be one to two full days. We recommend limiting virtual meetings to three hours or less.
- Consider planning for the kickoff meeting to be longer than future collaborative sessions.
- Consider planning for longer or additional meetings if learning collaborative topic is especially complex or if teams will likely include cross-functional representatives who do not usually work together.

Step 8: Anticipate and identify technology resources

Decide which technology resources are needed for the collaborative and communication between sessions.

Consider the following options for technology resources:

- Conference calls or virtual meetings
- Listserv
- Dedicated website
- Online surveys
- Collaborative platforms like Microsoft Teams or Slack

Make sure adequate training on the use of selected resources is available to participating teams and faculty members.



If you are planning a virtual collaborative which spans multiple time zones, plan meetings so they will be at a reasonable time for all participants.



Consider covering lodging or travel costs for face-to-face meetings (if funds allow).



If you anticipate that travel costs and time may be a barrier to attending face-to-face meetings, consider replacing one or two of the meetings with a web-based format.



Keep it simple. Don't go high tech unless you need to.

1 Plan the Learning Collaborative

Step 9: Develop a change package

A change package is a set of high-level change concepts and key changes critical to the improvement of an identified care process. A change concept is a general approach or idea for activities that lead to improvement and key changes (sometimes called strategies) are specific changes or activities used to achieve the desired change.

The change package can be based on expert opinion or experience, literature review, relevant quality improvement guides, or any combination of these sources.



See [IHI's page on using change concepts for improvement](#) to learn more.

Tips for identifying change concepts:

- Focus on the collaborative goal. What changes will teams need to make to reach this goal? It may help to work backwards from the ideal state to the current state and map out the steps in between.
- Think about participating teams. What changes are you hoping clinical teams will make as a result of participating in the collaborative? Change concepts should be realistic and teams should be able to test key changes in their local environments.
- Ground change concepts in a theory of change. You should have a clear understanding of how your change concepts will lead to the desired outcome. If you don't have a theory of change, try starting with a driver diagram to help you think through how the activities performed will lead to the intended changes in outcomes.
- Think about how data and metrics will fit into your change package. How will you measure the change? How will you know that change is an improvement?



Learn more about theories of change from [the Center for Theory of Change](#).



Use this change package template to get you started



Example change packages:

[Million Hearts Hypertension Control Change Package](#)

[Million Hearts Tobacco Cessation Change Package](#)



Use IHI's Driver Diagram Worksheet to identify the "drivers" or change ideas that will help teams meet the collaborative goal.



Example driver diagram:

EvidenceNOW Driver Diagram from the Agency for Healthcare Research and Quality



If you are having difficulty identifying change concepts, consider using IHI's Change Concepts Worksheet to brainstorm ideas.

1 Plan the Learning Collaborative

Step 10: Make decisions about data collection and reporting

Select a set of 3-5 core metrics for teams to use to track their progress towards collaborative goals and decide whether measurement will be required by all participating teams. Metrics should be clearly linked to the change package.

- For some collaboratives where data may not be easily available, regular data reporting is not required but instead teams report on their progress towards goals.

Tips for selecting metrics:

- Consider quality-related funding requirements, individual performance measurement preferred by providers, availability of standards of care, and existing metric definitions.
- Metrics should be meaningful, measurable, realistically improvable, and based on guidelines or experience. See the sidebar for examples of guideline-based metrics.

Some collaboratives allow teams to choose their own metrics.

In this case, encourage a four-part process:

- Identify desired metrics, link them to the change package.
- Create metric definitions (see the [metric definitions table](#)).
- Determine which databases (if any) contain the information for all defined metrics (all numerators and denominators).



Begin collecting best practices for metrics related to the collaborative topic early in the planning process.



Include a balancing metric that reflects a system or process that could be compromised by the improvement work.



If possible, use data teams are likely already collecting.



Example quality improvement metrics:

Clinical Quality Improvement Opioid Measures from the Centers for Disease Control and Prevention

1 Plan the Learning Collaborative

Step 10: Make decisions about data collection and reporting (continued)

Provide detailed metric definitions to teams to help ensure data can be compared across teams. Detailed metric definitions include conceptual definitions, operational definitions, numerators, and denominators. See the metric definitions table.

Determine the frequency of data reporting, the sampling approach, data collection and reporting processes, and data collection tools to be used. Tools should help make data collection and reporting easy for busy teams.

Anticipate the training needs of teams when it comes to data collection.

Decide how teams will report on process measures like their improvements, challenges, barriers, and any unintended consequences in addition to core quality metrics.

Step 11: Develop a timetable with key milestones

Develop a timetable for the entire initiative including these milestones:

- Finalization of collaborative planning, including a completed charter (see [Phase 1, Step 12](#))
- Identification and invitation of participating teams
- Pre-work assignments
- Kick-off meeting and future meetings
- Reporting cycles for participating teams
- Routine conference calls, coaching calls, and communications with participating teams



Use this metric definitions table to communicate clearly about your metrics.



Make a spreadsheet template that will automatically create graphs and tables from the data team members enter.



Adapt this timetable with key milestones spreadsheet to fit your project needs.

1 Plan the Learning Collaborative

Step 12: Draft a learning collaborative charter

With the planning group, draft a learning collaborative charter. A charter is a document that clearly states the project's purpose, objectives, scope, activities, and stakeholders. The purpose of the charter is to organize information about the learning collaborative, track decisions made, and to help ensure consistent messaging for future participants.

To create the charter, start with the outline and fill in information as you move through the planning process.

- In the early stages of planning, you likely won't have information for every section of the charter. Use this first draft of the charter to document decisions you have already made about the collaborative and think about planning you have yet to do.

Use the language in the charter to start conversations with diverse stakeholders (e.g., funders, care providers, opinion leaders, and consumers) about the collaborative. Seek feedback from these stakeholders often during the planning process.

Check, check, and double check that the purpose and intended outcomes of the learning collaborative are very clear.

- You may decide to write an aim statement for the collaborative. An aim statement includes both the overarching mission and the numeric goal. It should specify the population of focus, the timeframe, and measurable changes.



Use this Learning Collaborative Charter Outline to start your charter.



Example charters:

Reference these Example Charters compiled by the University of North Carolina School of Medicine. You will notice there are many different ways to structure a charter. Choose an outline that has information most relevant to your collaborative and adapt as needed.



If you choose to write an aim statement, start with IHI's Aim Statement Worksheet.

1 Plan the Learning Collaborative

Step 13: Plan to evaluate the collaborative

Make a plan for evaluating the learning collaborative based on teams' progress in achieving the collaborative outcomes (using the core metrics identified in [Phase 1, Step 10](#)) and participants' experience with the collaborative. Depending on what the funder wants and the resources available, evaluation could be simple or robust.

For simple evaluation, we recommend tracking key metrics using run charts (see the run chart tool) and collecting feedback from participants at the end of each meeting.

- Collect both formal and informal feedback from participants.
 - To gather formal feedback, ask participants to complete surveys or participate in semi-structured interviews
 - To gather informal feedback, ask participants to give verbal feedback to open-ended questions like: What about this session went well? What should we change next time?
- If you are only able to do a simple evaluation, consider sending an anonymous survey with questions like:
 - On a scale of 1 to 5, how satisfied were you with this learning collaborative session?
 - What was your favorite part of this learning collaborative session?
 - What was your least favorite part of this learning collaborative session?
 - What ideas for improvement do you have?
 - Are there any other comments or feedback you would like to share?
- You could also use information like session attendance to help you evaluate the collaborative.



Some evaluation is better than none! Do what you can to evaluate your collaborative, even if it's just a little bit.



IHI has an excellent [Run Chart Tool](#). Use this tool and template to track key metrics over time.

[Run Chart Control Chart Instructions](#)

[Run Chart Template](#)



Keep track of outcomes that are easy to quantify. What percentage of participants attended each session? How many PDSA cycles did teams complete?

1 Plan the Learning Collaborative

Step 13: Plan to evaluate the collaborative (continued)

For a more robust evaluation, we recommend starting with your logic model or theory of change and creating an evaluation plan based on that.

- A logic model is a visual depiction of the inputs, activities, outputs, and outcomes of a program. Many logic models also include assumptions and external factors that are expected to influence the other elements in the logic model. See the logical model manual.
- Details in your evaluation plan should include expected short, intermediate and long-term outcomes as well as indicators/metrics and data sources for short and intermediate outcomes.

Whether your evaluation is simple or robust, use participant feedback to improve the collaborative in real time and for summative evaluation.

- Feedback during the collaborative should identify gaps in understanding that faculty can address between meetings or in the next meeting.
- Feedback at the last meeting should measure the overall effectiveness of the learning collaborative. Use this information to plan for future initiatives.



Use this Logic Model Manual from the Center for Community Health and Evaluation as a guide for creating a logic model. This tool includes an example logic model and a template.



If you can do a robust evaluation, consider using this Evaluation Plan Template from the Centers for Disease Control and Prevention (CDC) to help you plan.



Conduct a mid-collaborative focus group to get feedback from teams and inform the topics and structure of the rest of the collaborative.

1 Plan the Learning Collaborative

Step 14: Consider using a baseline assessment

Consider using a baseline assessment to measure the teams' quality improvement skills and skills related to the content of the collaborative.

- The purpose of a baseline assessment is to highlight strengths and opportunities for improvement, so teams know where to focus their improvement efforts.

Choosing a baseline assessment:

- A good baseline assessment will be specific to the learning collaborative topic.
- If possible, take advantage of already developed assessment tools.

Administering a baseline assessment:

- Introduce the assessment to teams during an early session or call. Provide clear instructions for how to fill it out and when/where to turn it in.
- Share assessment results back with teams. You may choose to lead a discussion on similarities or differences between teams during a meeting.

Using baseline assessment results:

- Use information from the assessment to help teams set priorities during the collaborative and to adjust the collaborative content to meet the needs of participants.
- You may decide to repeat the assessment at the end of the collaborative to highlight improvements and to contribute to the evaluation of the collaborative.



Example baseline assessments:

The [Patient-Centered Medical Home Assessment](#) from Improving Chronic Illness Care

The [Six Building Blocks Assessment](#), which measures long term opioid management

[Pain and Opioid Assessment from KPWHRI's Learning Health System Program](#)

[IHI Improvement Capability Self-Assessment Tool](#)

2 Recruit Learning Collaborative Participants

Step 1: Decide on expectations for the composition of participating teams

Determine the target audience and identify criteria for participation in the learning collaborative.

Decide how many teams to include in the learning collaborative. We recommend having at least 4 teams to facilitate peer learning and ensure sufficient attendance for group activities. Make sure you have enough staff and other resources to support all the teams during the collaborative, including coaching and personalized attention from faculty.

Decide how many members should be on each team and which team members should be included on the learning collaborative team to represent their organization. Teams should generally be interdisciplinary and include only members who are able to consistently attend.

- If clinic teams have dedicated quality improvement staff, they should be strongly encouraged to attend.
- Include clinicians and decision-makers on the learning collaborative teams. Clinicians can serve as champions/advocates of the work for their peers and decision-makers can help make sure the team has necessary resources.

Step 2: Build networks to help with recruitment

Identify teams that may be interested in your collaborative by tapping into practice networks, professional organizations, or other interest groups/membership organizations. You may also want to advertise on websites or listservs of related organizations or reach out to large healthcare organizations or local medical colleges directly.

Members of the faculty and planning group should all help with the targeted outreach by leveraging their professional (and potentially personal) networks. Ask planning group members and faculty to name who they will reach out to and how.



The most successful teams will have a leader who is willing to promote the project to other decision makers, an individual who can act as a project manager to keep the team on track, and content experts that represent each portion of the process.



If you connected with potential participants early in the planning process (see [Phase 1, Step 4](#)), consider reconnecting with them before you start officially start recruitment to maintain their interest. Consider sharing key collaborative dates with teams who have expressed interest in participating.

2 Recruit Learning Collaborative Participants

Step 3: Develop recruitment materials and tools

Create a general recruitment strategy, and then develop the materials you may need. Effective recruitment materials include letters, fliers, email templates, social media posts, newsletter blurbs, etc.

Recruitment materials may contain:

- Learning collaborative purpose and goals
- Indicators of success, expected outcomes
- Roles and expectations for participants
- Introduction of faculty members
- Benefits of participation
- Information about resources available for participation (i.e., travel money or other funding, CME credit)
- Information about how to express interest/enroll or who to contact for more information



Use feedback from the Planning Group and faculty to create the start-up materials but enlist a smaller group to do the actual writing; writing by committee can be very time-consuming.



Use this sample recruiting task list as a guide for your recruitment efforts.



Example recruitment materials:

[Washington Association of Community Health Screening for Social Needs Learning Collaborative Recruitment Letter](#)

[Healthy Hearts Northwest Recruitment Flyer](#)

[Agency for Healthcare Research and Quality Learning Collaborative Expression of Interest Form](#)

2

Recruit Learning Collaborative Participants

Step 3: Develop recruitment materials and tools (continued)



Decide how you will track outreach and recruitment activities, including information about teams that express interest in participating. Options include spreadsheet, Redcap, Access, etc.



Create a list of potential benefits to participation to include in your recruitment materials. Benefits may include improved efficiency of work, increased job satisfaction, or higher quality patient care. If possible, the planning group should define the business case for engaging in the learning collaborative.



Recruitment materials should highlight the importance of the learning collaborative topic and the benefits of participation.



Create a spreadsheet to track contact information for participating teams and team members, with space to capture changes to the team (e.g., if a member leaves or changes roles).

2 Recruit Learning Collaborative Participants

Step 4: Create a participant agreement

Create a document that outlines expectations for participating teams and for the learning collaborative coaches and faculty. Sometimes called a Memorandum of Understanding (MOU), the purpose of this document is to formalize a clinic team’s commitment to participation.

A participant agreement should include:

- Names and contact information for team members who will participate in the learning collaborative.
- Clearly communicated expectations for team participants, including expectations for attendance, participation, and engagement during Plan-Do-Study-Act (PDSA) cycles between sessions.
- Expected deliverables and deadlines for participating teams.
- A statement to confirm leadership endorsement for team participation in the collaborative.



Example participant agreement:

Participant Agreement from Healthy Hearts Northwest (in this example, the term “partnership agreement letter” is used).

2 Recruit Learning Collaborative Participants

Step 5: Engage in outreach and advertising

Once the planning group and faculty have developed a recruitment strategy and created materials, it is time to officially invite participating teams to the learning collaborative.

You may want to start recruitment with a very broad call for participants through large email distribution lists or posting on well-used websites with relevant content.

For more targeted outreach, connect with individuals or groups you think may be interested in the collaborative. Personalize these invitations and be sure to explain why you thought they would be interested in the learning collaborative and/or if they were referred by anyone.

- At this point, members of the faculty and planning group should follow up on their plans for reaching out (see [Phase 2, Step 2](#)).
- If you connected with potential participants early in the planning process (see [Phase 1, Step 4](#)), send them a personalized invitation which acknowledges their involvement in the development of the collaborative.

Once you have a few interested teams, consider asking them to share information about the learning collaborative with their networks to help with recruitment.



Personalized outreach is a very effective recruitment strategy. Utilize “warm handoffs” (i.e., a personalized introduction) whenever possible.

2 Recruit Learning Collaborative Participants

Step 6: Follow up with interested teams

When a person or team expresses interest in the collaborative, connect with them to provide more information and answer any questions they may have. This outreach may be a follow up letter, email, or call.

Help potential participants get buy-in from high-level decision-makers for learning collaborative participation.

- Consider sharing a business case for collaborative teams to use.
- Include leaders in follow-up and/or orientation contacts.
- Consider having a faculty member reach out to leaders to explain the purpose of the collaborative, the value of participating, and required time and resources.
- Introduce the participant agreement and support teams in getting leadership endorsement for the activities spelled out in the agreement.



Screen potential teams using a standardized list of questions so that comparisons can be made. Test the screening tool with one or two potential participants and make adjustments before using it with all participants.



Participating teams will get out of the learning collaborative what they put into it. Don't drag in unwilling participants. Instead, invite a smaller number of teams who are truly engaged in the project.

2 Recruit Learning Collaborative Participants

Step 7: Enroll learning collaborative participants

Ask teams who have agreed to participate to solidify their commitment by signing a participant agreement (see [Phase 2, Step 4](#)).

At this time, you may want to gather additional information from participating teams including information about their quality improvement experience, clinic context, and available resources. Use this information to help you adjust the collaborative to fit participant needs.

Share materials teams need to prepare for participation in the collaborative.

Examples may include:

- Collaborative charter
- Timeline for learning collaborative activities
- List of the roles and responsibilities of team members during the collaborative
- Key collaborative metrics and routine data reporting requirements
- Letter introducing coaches and faculty members
- Glossary of improvement terms and concepts
- Selected quality improvement or content-specific resources (e.g., publications, relevant articles)

3 Prepare and Facilitate Collaborative Meetings

Step 1: Host an orientation call

The purpose of an orientation call/session is to welcome teams to the learning collaborative, provide information about the collaborative, and start building relationships with and between participating teams.

During the orientation call, coaches and faculty should introduce themselves and the collaborative, outline the expected benefits of involvement, discuss the expectations of participation, describe available quality improvement resources, and answer participants' questions. Teams should also be given an opportunity to introduce themselves.

Step 2: Consider hosting a codesign session

The purpose of a codesign session is to bring teams who will participate in the collaborative into the design process and to increase their enthusiasm and buy-in for the work ahead. If you host a codesign session, make sure the majority of the time is spent eliciting feedback and shaping the collaborative agendas.



Provide this introductory presentation template for teams to present at the first meeting.



Example orientation call agenda from the Washington Association of Community Health Screening for Social Needs Learning Collaborative



Example codesign session agenda:

Washington Association of Community Health Screening for Social Needs Learning Collaborative Codesign Workshop Agenda

3 Prepare and Facilitate Collaborative Meetings

Step 3: Develop pre-work assignments

Create a pre-work assignment to maximize the effectiveness of the learning collaborative sessions. Pre-work should introduce participants to basic information about quality improvement and the purpose, goals, and metrics of the collaborative.

Choose 1-2 pre-work assignments from this list of ideas:

- Fill in an [introductory presentation template](#) to present at the first meeting.
 - This presentation should introduce the clinic, participating clinic staff, their goals for participating in the collaborative, and previous experience with quality improvement and/or the collaborative topic.
- Read the collaborative charter.
- Read pertinent articles on the topic of focus or quality improvement principles and theories.
- Complete on-line training in quality improvement, such as Quality Academy, an on-line training resource available at NationalQualityCenter.org, or training through the [Institute for Healthcare Improvement Open School](#).
- Learn about collaborative metrics and start thinking about data collection.
- Develop a quality improvement project memo, which is a concise description of the project that includes a problem statement, project goals, a list of team members, and other relevant information (see template).
 - This memo should be based on the learning collaborative charter and specific to the clinic team. Participants can use the memo to share information about the collaborative work with their colleagues.



Provide this introductory presentation template for teams to present at the first meeting.



Be sure teams have sufficient time, information, and resources to complete whatever pre-work is assigned. Coaches should make themselves available to answer questions if they come up (i.e., via email, or with pre-scheduled calls).



Provide an estimate for the number of hours participants will need to invest to complete start-up materials assignments

3 Prepare and Facilitate Collaborative Meetings

Step 4: Plan meeting logistics

Plan the learning collaborative logistics in detail to ensure the meeting is interactive, comfortable, and effective.

Determine who is responsible for each of these tasks:

- Preparing ahead of the meeting: planning agendas including detailed facilitator agendas, creating presentations, making plans for the venue and meals, assessing technology needs, etc.
- Preparing day-of: printing agendas, setting up the meeting space, testing technology, etc.
- During the collaborative: facilitating, presenting, leading activities, note-taking, timekeeping, etc.



Providing meals for participants encourages relationship-building and prevents late starts after meal breaks. Remember to plan meals with a variety of dietary needs and preferences in mind.



Book your venue well in advance of the sessions if hosting in-person sessions. Consider changing venues throughout depending on the geography of your participants.

3 Prepare and Facilitate Collaborative Meetings

Step 5: Draft meeting agendas

Think ahead about the content you hope to cover in each session, even though agendas may not be finalized until a week or two ahead of each session.

Sample Meeting Content				
Content Areas	1 st Meeting (Kickoff)	2 nd Meeting	3 rd Meeting	4 th Meeting (Wrap-Up)
Introduction to the learning collaborative	<input checked="" type="checkbox"/>			
Quality improvement training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Content expert lecture on topic of focus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Instruction on metrics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Instruction and feedback on small tests of change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Peer networking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Peer learning opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sustainability and maintenance		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Plan for spread				<input checked="" type="checkbox"/>
Celebrate success				<input checked="" type="checkbox"/>



Don't overload participants with quality improvement training and tools at the first session or expect them to master the concepts immediately. It may take repeat exposure at subsequent meetings or time testing the tools for participants to absorb the information.



This PDSA worksheet is a great introduction to small tests of change.



IHI's Cause and Effect Diagram Worksheet can help teams identify the causes that lead to a particular outcome.

3 Prepare and Facilitate Collaborative Meetings

Step 5: Draft meeting agendas (continued)

Be sure to use information from the co-design sessions and other participant feedback when planning meeting agendas.

If you are hoping to have guest faculty speak at a session, notify them as soon as possible so they can block time on their calendars.

Make good use of participant time. Remember the goal of collaborative meetings is to provide participants with opportunities to learn from and strategize with faculty members and each other. Meeting agendas should minimize didactic time and provide ample opportunities for teams to connect, problem solve, and exchange best practices.

Structure collaborative sessions based on adult learning principles. Remember that adults learn best when offered multiple ways to learn, when instruction is applied to real world situations, and when sessions are interactive.

Make sure faculty and supporting team members receive detailed agendas ahead of each session which outline what they are responsible for and when it should happen. Make two versions of each agenda: an agenda for participants and a detailed facilitators agenda for those with responsibilities during the meeting.



Plan time for teams to have informal conversations. Consider planning 30-minute breaks at in-person meetings and designating those breaks as “break and networking time.”



Example meeting materials:
Washington Association of
Community Health Screening
for Social Needs Learning
Collaborative

- [Agenda](#)
- [Facilitator Agenda](#)
- [Slide Deck](#)

3 Prepare and Facilitate Collaborative Meetings

Step 6: Make it fun!

Learning collaborative sessions should be fun! Below are some tips for engaging and entertaining participants.



Provide opportunities for relationship building.

- We recommend starting meetings with icebreakers (silly or serious). With groups of ten or fewer, participants can respond to icebreakers verbally. For larger groups, ask participants to share with a neighbor or type a response in the meeting chat.



Use materials that spark creativity.

- If you're meeting in-person, we recommend supplying colored post-its, markers, and even fidget toys like stress balls.
- If you're meeting virtually, consider using fun visuals, small voting activities or polls, or platforms that allow for drawing or using stickies in a shared space.



Help teams minimize hierarchy and collaborate as a team.

- Structured activities where everyone is operating with the same rules and has an equal opportunity to participate can help facilitate new ideas for team-based care.



Spend some time with these resources to get new ideas for engaging teams during the collaborative.



Play music at the start of collaborative sessions or as teams come back from breaks. Make sure any lyrics are appropriate for your audience.



Voting activities could be about the learning collaborative (e.g., On a scale of 1 to 5, how prepared do you feel to run a PDSA?) or about something fun (e.g., Where are you most likely to be on a day off? a) at home resting or doing projects b) in the great outdoors c) out and about with friends or family).



Use Liberating Structures: 33 methods for engaging teams to get ideas.



Facilitating Intentional Group Learning: A Practical Guide to 21 Learning Activities is an excellent resource.

3 Prepare and Facilitate Collaborative Meetings

Step 7: Host a kickoff meeting

The kickoff meeting should help participants better understand the topic of focus, raise enthusiasm, and create a safe environment for effective peer learning.

Prior to the kickoff meeting, remind participants to bring their pre-work assignments, or better yet—submit them prior to the meeting for review by the faculty and to share with other teams.

During the kickoff meeting:

- Provide basic information about quality improvement (unless participants already have substantial quality improvement experience).
- Facilitate a detailed discussion of the collaborative metrics, change package, and how to test changes.

Step 8: Set goals and create action plans

Goal setting and action planning should be a regular part of all learning collaborative activities.

Collaborative meetings should include dedicated time for teams to work with coaches and faculty to develop action plans; they should leave each meeting with a clear understanding of what they need to accomplish prior to the next meeting, and who is responsible for what.

Action plans should list the change(s) the team is going to test, the steps involved in testing, identify the individuals responsible for each step, specify when each step needs to be completed, and explain how the test will be measured.

Coaches or faculty may need to help teams define metrics and make plans for data collection.

Coaching calls should include dedicated time for problem solving and helping teams meet their Action Plan goals.



Example kickoff meeting agenda:

Washington Association of
Community Health Screening
for Social Needs Learning
Collaborative Kickoff Agenda



Early in the learning collaborative, require teams to complete a data collection trial run. Ask teams to submit five records to assess the process of data collection and reporting. Based on these records, the teams can troubleshoot any problems with definitions of measures, data entry forms, and timetable. Use the formal and informal feedback you receive to make adjustments to the proposed indicators and routine reporting requirements.



Action Plan Template from
University of Washington's Six
Building Blocks program

3 Prepare and Facilitate Collaborative Meetings

Step 9: Host follow-up meetings

At this point, you should implement the meeting plan you made during [Phase 1, Step 7](#) and [Phase 3, Step 5](#). Remember, collaboratives often have three types of meetings: 1) learning collaborative sessions, 2) coaching calls, and 3) technical assistance calls or meetings.

Each follow-up meeting should include time for participants to share the ideas they are testing and receive feedback from faculty and other participants.

- For the learning collaborative meetings, this time may be structured as small group discussions, breakout rooms, or round-robin updates from all of the teams (for smaller collaboratives with ~6 teams or fewer).

Collaborative participants often say that the best part of the collaborative was the opportunity to learn from and connect with their peers. Build plenty of time for structured and unstructured peer learning into every meeting. Collaboratives often overfill agendas with didactic material. When in doubt, take it out!

Step 10: Obtain Feedback for Evaluation

Remember to carry out the evaluation activities you planned for at the beginning (see [Phase 1, Step 13](#)).

Review participant feedback regularly and adjust activities in response to feedback. Responding to participant feedback is critical to building trust between the planning group and the participating teams.



Support teams by providing information and tools to help them complete assigned tasks, such as clear instructions, templates and examples.



Example follow-up meeting materials:

Washington Association of Community Health Screening for Social Needs Learning Collaborative

- [Facilitator Agenda](#)
- [Coaching Call Agenda and Notes Template](#)
- [Breakout Session Agenda and Notes Template](#)

4

Maintain Momentum Between Collaborative Meetings

Step 1: Encourage peer learning

Learning collaborative activities should provide opportunities for peer learning through structured information sharing, group problem solving, and exchanging best practices.

In the early stages of the learning collaborative, use interactive activities to foster peer learning such as: team presentations of best practices, posting/sharing tools or workflows developed by participating teams, and inviting teams to share ideas, challenges, and successes.

In the later stages of a collaborative, participants may enthusiastically seek out peer learning and networking opportunities. Actively facilitate the development of relationships between participating teams.

Foster a culture of sharing and support by encouraging a growth-mindset and demonstrating kind, constructive feedback.

- During coaching calls, actively encourage participants to share questions, concerns, challenges, successes, and the status of testing.
- Facilitators and coaches should ensure that all participants have the opportunity to share or ask questions.
- If a competitive or judgmental environment develops, the facilitator should immediately address the situation.



Require teams to provide an update at each session and provide them with a list of questions to consider.

Sample questions: What change did you test? How did you measure success? How did it work? What did you learn? What will you do next?



If teams initially are hesitant to share tools, best ideas, or lessons learned, remind participants that the purpose of sharing them is to avoid “remaking the wheel” and that perfection is not required.

4

Maintain Momentum Between Collaborative Meetings

Step 2: Foster ongoing communication between teams

Provide regular ways for groups to communicate between sessions, such as on Slack, a Teams channel, regular coaching phone calls, or listserv communications.

- Coaches may pose questions or introduce controversial topics to these channels to spark conversation.

Link up teams to provide peer mentoring and learning opportunities. Teams could be divided regionally or because they share some other quality (e.g., electronic health record system, metrics). Assign a coach to this sub-group and make sure the teams know why they were grouped together.



Require tested changes and data to be posted in a place where all participants can see them. Ask other teams to review and provide feedback.



When a participant reaches out with a question, post it to the listserv or collaborative platform to start a discussion rather than answering the participant individually.

4

Maintain Momentum Between Collaborative Meetings

Step 3: Enable routine data reporting

In many collaboratives, each participating team must routinely report performance data and changes tested between sessions. It is critical that team members have a clear understanding of their reporting responsibilities, including the required and optional indicators, detailed definitions of indicators (i.e., numerators and denominators), frequency of reporting, use of sampling approach, timetable for reporting, and use of manual data collection forms, if required.

Distribute a data collection spreadsheet or reporting template to streamline data collection and reporting and to maintain consistency (see tools). Standardizing data collection and reporting will make it easier to aggregate and compare data from different teams.



Coaches should be available as needed to provide clarification and individualized technical assistance to avoid reporting delays.



Dedicate time during routine conference calls early in the learning collaborative to discuss data collection processes and potential pitfalls. Later calls can be dedicated to findings reported by teams.



Anticipate resistance to data collection and reporting requirements and be ready to provide assistance. Remind teams that data collection will take less time as collection processes develop.



Use this Data Reporting Template to collect data from teams.



If teams have difficulty with data collection and reporting, listen to their concerns and help them overcome challenges. Coaches should help teams identify tools and resources to reduce the burden of data collection and encourage them to try their best (some data is better than no data). If data collection and reporting is more burdensome than expected, be prepared to make a mid-course correction if necessary.

4

Maintain Momentum Between Collaborative Meetings

Step 3: Enable routine data reporting (continued)

Tips for getting reports submitted on time:

- Send out frequent reminders about upcoming submission deadlines.
- Encourage teams to report to a listserv or collaborative platform (if available) so other participants can see which peers have already submitted reports.
- Faculty can consider devoting one conference all each month to the review of data and submitted reports.
- Keep reporting forms simple to make it easy for participants to complete them.

Step 4: Assess team participation and learning

Facilitators and faculty should regularly assess team participation and learning. If you observe a lack of participation or engagement, consider whether you need to adjust or if specific teams need additional support.

If teams are having difficulty engaging in activities, consider having their coach meet with them to remind them of their commitment and help address barriers. Use the expectations laid out in the Participant Agreement (see [Phase 2, Step 4](#)) to frame this discussion.

4

Maintain Momentum Between Collaborative Meetings

Step 5: Coach for progress and success

Coaches should regularly assess the progress of participating teams and provide regular coaching in group settings and with individual teams. Coaches can use any of the activities that occur between learning sessions—conference calls, listserv communications, and report feedback—as opportunities for coaching.

Coaches should read and provide individualized feedback on the teams' reports. Although time-consuming, this feedback sends the critical message to participants that their work is important.

- When reading a team's report, coaches should try to identify any challenges the team may be experiencing but not reporting. If by reading between the lines, the coach senses an issue is brewing, they should contact the team and solicit information, give support, provide suggestions, and propose alternative ideas.

Tips for coaching calls:

- Encourage peer learning by inviting one team to share their work and facilitating an interactive discussion around their successes, challenges, and lessons learned.
- Avoid “dead air” by choosing topics of special interest to the group. Ask teams what they would like to discuss during calls. It can also be helpful to provide information on call topics ahead of time.
- Coaches should speak as little as possible. When a participant poses a direct question, the facilitator should redirect it, by asking “Does anyone have advice?” If not, invite a coach or faculty member to provide insight or direction.
- Take attendance at the beginning of the call, and then make sure that all participants have an opportunity to speak. You may need to draw out a silent team by inviting them to weigh in on an issue or idea.



Gather lessons learned and requests for support from participant reports into one document to share with the teams.

5 Mark Success and Foster Sustainability

Step 1: Host a wrap-up meeting

Host a wrap-up meeting to sum up the work completed, celebrate successes, and provide closure for participating teams and faculty.

During the wrap-up meeting:

- Provide opportunities for teams to name and reflect on the effect of participation on the lives of participants, other staff in their organizations, and patients.
- Facilitate activities to help teams brainstorm ideas for maintaining and spreading changes made during the learning collaborative. Encourage teams to make an action plan with specific tactics for sustainability and/or spread.
- Encourage (or require) teams to give presentations about their lessons learned during the collaborative. In presentations, teams should describe a specific success, display supporting data, list challenges and barriers, and discuss their plans for sustaining the gains they achieved.
 - To ensure short, simple presentations, learning collaborative leaders may want to provide a presentation template or give teams a worksheet to fill out and then have learning collaborative staff prepare the presentation for them. See the lessons learned presentation template.
- Include a clear call to action. What are the teams' next steps? How can participants formalize plans now for future sustainability?



Example wrap-up meeting agenda:

Washington Association of Community Health Screening for Social Needs Learning Collaborative Wrap-Up Facilitator Agenda



Adapt this presentation template for Teams to share their lessons learned at the wrap-up meeting.



Encourage teams to use this Sustainability Planning Worksheet from IHI.



Example sustainability resources for teams:

The University of Washington's Six Building Blocks Program

- [Things to Consider when Planning for Sustainability](#)
- [Monitor & Sustain Activities Checklist](#)

5 Mark Success and Foster Sustainability

Step 1: Host a wrap-up meeting (continued)

Remind teams that the end of this learning collaborative is merely a milestone on the improvement journey. If a learning collaborative has been successful, participating teams will have acquired sufficient capacity by its completion to continue the quality improvement work without the support of coaches. Participants will be comfortable with quality improvement concepts, will have seen firsthand the benefits of effective improvement endeavors, and will feel competent initiating quality improvement projects on their own.

Provide teams with tools to help with sustainment. Tools may include topic-specific sustainability checklists or things to consider when planning for sustainment or spread, tools to help with making a sustainability plan, and assessments to help them monitor sustainment. See tools to help with this.



[The Clinical Sustainability Assessment Tool](#) was developed by the Washington University in St Louis to help teams understand sustainability, assess their readiness for sustainability, and develop an action plan to facilitate sustainability. Valuable tools within this resource include:

- [Clinical Sustainability Assessment Tool](#)
- [Example Sustainability Action Plan](#)
- [Action Planning Table](#)
- [Action Planning Worksheet](#)

5 Mark Success and Foster Sustainability

Step 2: Evaluate the learning collaborative and capture lessons learned

Complete the evaluation plan you developed in [Phase 1, Step 13](#).

We suggest evaluating the learning collaborative based on teams' progress in achieving the collaborative outcomes (using the core metrics identified in [Phase 1, Step 10](#)) and participants' experience with the collaborative.

If you had teams complete a baseline assessment (see [Phase 1, Step 14](#)), ask them to re-do this assessment prior to the wrap-up meeting to measure their progress during the collaborative.

- Create a visualization to compare their scores before and after the collaborative activities.
- Consider sharing back changes in assessment scores in aggregate to highlight the progress of the group towards a common goal and highlight the overall accomplishments of collaborative participants.



Example Pre-Post Assessment Visualization from KPWHRI's Learning Health System Program.

5

Mark Success and Foster Sustainability

Step 3: Facilitate ongoing relationships

Help teams stay connected for future peer learning and problem solving.

- If you used a platform for teams to communicate between sessions (such as on Slack, a Teams channel, or a listserv), consider maintaining this resource after the collaborative has ended.
- Ask teams if they would be willing to share contact information with other teams, then make a contact sheet to share with the whole group.

Coaches may want to check in with teams 6 months or 12 months after the collaborative has ended to learn how sustainability is going and remind teams of tools or resources if needed.

If you come across new resources related to the collaborative topic, share them with teams that participated.

5

Mark Success and Foster Sustainability

Step 4: Consider options for dissemination

Compile a list of best practices and tools developed by participants during the learning collaborative. Make these tools accessible to participants long-term and for wider distribution and dissemination.

Suggest that participating teams plan an event to share their successes and lessons learned with their clinic teams, leadership, and the broader community. Support them by providing a worksheet with questions for teams to consider to help them plan their presentations or posters.

Consider publishing a manuscript, white paper, or methods paper if you learned something during the collaborative that isn't well understood in peer-reviewed literature.

Share tools, resources, and success stories in relevant newsletters, email blasts, and webpages.



Example Poster Presentation Worksheet from the Value Champions Fellowship Project funded by the Robert Wood Johnson Foundation



Host a “capstone meeting” where each team has an opportunity to present a poster (physical or PowerPoint poster) about the results of their project. Invite an outside audience to attend these presentations, including leadership from their health care organization.

Conclusion

Learning collaboratives can be an engaging and effective way for health care organizations to take part in focused quality improvement efforts. We hope this toolkit will facilitate the successful implementation of learning collaboratives and ultimately improve the quality of care provided. Happy collaborating!



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The structure and content of this toolkit was adapted from the New York Department of Health AIDS Institute guide [Planning and Implementing a Successful Learning Collaborative](#).

Clickable toolbox

1 Plan the Learning Collaborative

2 [Planning group member matrix](#)

9 [Change package template](#)

[Driver diagram worksheet](#)

[Change concepts worksheet](#)

10 [Metrics definitions table](#)

11 [Timetable spreadsheet with key milestones](#)

12 [Learning collaborative charter outline](#)

[Aim statement worksheet](#)

13 [Run chart tool](#)

[Run chart control chart instructions](#)

[Run chart template](#)

[Logic model manual](#)

[Evaluation plan template](#)

2 Recruit Learning Collaborative Participants

3 [Sample recruiting task list](#)

Clickable toolbox (continued)

3 Prepare and Facilitate Collaborative Meetings

3 [Introductory presentation template](#)

5 [PDSA worksheet](#)

[Cause and effect diagram worksheet](#)

6 [Liberating structures](#)

[Facilitating intentional group learning](#)

8 [Action plan template](#)

4 Maintain Momentum Between Collaborative Meetings

3 [Data reporting template](#)

5 Mark Success and Foster Sustainability

1 [Lessons learned presentation template](#)

[Sustainability planning worksheet](#)

[The clinical sustainability assessment tool](#)