Spread Planner – Instructions

What Is a Spread Planner?

Spread is the degree to which a process, best practice or improvement is adopted by an organization. Spread can occur both passively, through diffusion, and actively, through dissemination. Regardless of the manner in which the change is spread, its adoption requires:

- An understanding of unmet needs – known as “a sense of urgency”
- An awareness of change ideas and concepts
- An evaluation of the applicability of potential changes to new environments
- The belief that the change will result in improvement
- Action to adopt the change

A **Spread Planner** is an effective tool for quality improvement teams seeking to spread an improvement, as it allows them to clearly outline how they plan to spread the improvements they have made. It is a useful tool whether the team is spreading change to another organization, or to other parts of their own organization.

The four steps necessary to spreading any change are as follows:

1) **Clarify what is being spread:** Prior to initiating the spread of a practice or idea, it is important for the team spreading the change to agree on what it is that is being spread. Is the team attempting to spread a specific change idea? A change concept? Or even a new or redesigned system of care? Without consensus, it is difficult to spread sustainable change.
2) **Determine how to spread the change:** The “best way” to spread a change will vary depending on the specific practices and culture of an organization. For example, in some it may be that talking directly with colleagues might be the best way to spread a change. In others, it may be that change needs to originate with senior management or organizational leadership. Tailor your spread plan to suit your organization.
3) **Identify and confirm resources:** Spreading improvement requires resources. The support of organizational leadership, someone to lead the spread efforts, trained staff, and access to the necessary equipment will improve the likelihood of successfully spreading an improvement. It is helpful to identify these resources early in the spread process.
4) **Monitor and communicate progress:** Having a plan that outlines how you will monitor and communicate the progress of your spread initiative will support ongoing learning and improvement within your organization.

Steps to Spreading Change

Below are tables that contain lists of ideas to consider during each step of the spread process. Although all of the ideas within these tables may not be applicable to every organization and situation, the more items teams can check off, the more successful their spread efforts are likely to be. Each of the tables below also contain a planning area. Together, the four planning areas make up a spread plan.

Step 1: Clarify What Is Being Spread

Checklist

☐ The team has documented what they are planning to spread.
☐ The components of the change to be spread have been described.
☐ The advantages of the change have been identified.
☐ Ideas for potential adaptation have been documented.
☐ The changes are packaged in a way that they can be easily understood and tested by adopters.
☐ Copies of helpful tools and methods used by the pilot sites, copies of process maps that outline the process, and policies and procedures are gathered and ready to be distributed as part of the spread activities.

Planning Area

We are planning to spread:

Adaptation ideas are:

Materials (tools, process maps, etc.) we will distribute to support the spread activities:

Name	Status (i.e., to be developed by…, ready for distribution)

Step 2: Determine How to Spread the Change

Checklist

☐ The team has identified who the change is being spread to.
☐ The team has identified communication methods that work for each audience.
☐ The team has identified the message that will be the most important to each audience.
☐ The plan includes “sticky messages”: simple, unexpected, concrete, credible, emotional stories.
☐ There is a plan to provide opportunities to observe the success of the change.
☐ The team has identified how the changes are compatible with the practice/clinic’s current culture and values.
☐ There is a mechanism to acknowledge and address concerns.

Planning Area

To whom are we spreading the change?

The best way to reach each group we are spreading to is …

The message that is most important to each group is …

Who will take the lead?

By when?

Step 3: Identify and Confirm Resources

Checklist

☐ Leaders support the spread initiative.
☐ Someone has been assigned responsibility for executing the spread plan.
☐ There is a team to support the spread plan implementation.
☐ There is sufficient equipment and resources to support spread of the improvement.
☐ Required training opportunities, changes in job roles and responsibilities and policies and procedures have been created.
☐ There is a plan for leaders to provide ongoing support and encouragement for the spread efforts.

Planning Area

Resource areas we need to strengthen are:

We plan to strengthen the resources to support our spread efforts by:

Step 4: Monitor and Communicate Progress

Checklist

☐ There is a mechanism to encourage communication between the spread team, original pilot members and the adopters.

☐ Indicators for monitoring what is spread and the rate of spread and adoption have been determined.

☐ Someone has been identified to collect, plot, and share the data.

☐ The spread progress will be regularly shared across the organization.

☐ There is a way to capture and share new learning and knowledge from the spread efforts.

Planning Area

We will measure our spread efforts by:

We will communicate across the practice/clinic/organization about our progress of spread by:

We will capture and share new learning and knowledge from the spread efforts by:

Helpful Sources

- Centre for Healthcare Quality Improvement (2010). *Planning for Spread: A Guide for ED-PIP Coaches & Team Leads*. CHQI: Toronto, ON.
- Heath & Heath (2007). *Made to Stick*. Random House: New York.
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- NHS Modernization Agency (2002). *Improvement leader's guide to sustainability and spread*. Ancient House Printing Group: Ipswich, England.

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