

QI Essentials Toolkit: Project Planning Form



The Project Planning Form is a useful tool to help teams think systematically about their improvement project. By tracking a list of the changes that the team is testing — including all of the Plan-Do-Study-Act (PDSA) cycles, the person responsible for different aspects of each test, and the timeframe for each phase of the work — the form allows a team to see at a glance the full picture of a project. (See PDSA template.)

Instructions

1. Use the form at the beginning of an improvement project to initiate planning.
2. In the top left corner, create a numbered list of the interventions on which the team will focus. “Interventions” are key leverage points in the system that are your opportunities to influence the outcome and achieve your aim.
3. Next to each intervention, identify a process measure and goal as follows:
 - Process measure: Define in specific terms how you will measure the intervention, to evaluate the results of your tests of change.
 - Goal: State a measurable goal for that intervention (i.e., define in specific terms what you want the results to be after your changes).
4. Fill out the grid for each intervention using the following questions to prompt you:
 - Change Idea: What idea for improvement will you test?
 - Tasks to Prepare for Tests: What tasks will you need to perform to set up and run the test?
 - Person Responsible: Who is responsible for each task you’ve identified?
 - PDSA: What are the details of your test?
 - Timeline: How many weeks do you expect to need for each phase of the improvement cycle (Testing, Implementation, and Spread)? Indicate where each phase will end with the letter T, I, or S.
5. As the project continues, update the Project Planning Form regularly with your ongoing tests of change.

Example: Project Planning Form

Team: John, Sally, Mark, Dave, Laura, and Beth Project: Lowering Depression Scores: Achieve a 15-point decrease in PHQ-9 scores for 50% of depressed patients by May 1.																			
Intervention-List the interventions you'll be working on		Process Measure				Goal													
1. Patient education		% of patients in depressed population receiving education materials before leaving office will have documented use of education materials				90% of patients in depressed population will have documented use of educational materials before leaving office													
2. Follow-up assessment		% of patients in depressed population that have a follow-up assessment within the first eight weeks of their initial diagnosis				75% of patients in depressed population have a follow-up assessment within the first eight weeks of their initial diagnosis													
3.																			
4.																			
5.																			
6.																			
Intervention Number (from above)	Change Idea	Tasks to Prepare for Tests	PDSA	Person Responsible	Timeline (T = Test; I = Implement; S = Spread)														
					Week														
					1	2	3	4	5	6	7	8	9	10	11	12	13	14	
1	Provide pamphlet and link to short video at time of patient discharge	Need to make sure we have enough pamphlets on site; need to ensure link to video works	Nurse will hand materials to patient before leaving the exam room with all patients scoring high on the PHQ-9	Beth and Mark	T	T													
2	Patients will come back to the office for a follow-up assessment within eight weeks of depression diagnosis	Need to schedule appointments within timeframe and get patients to attend follow-up appointment; need to make sure secretaries are aware of this test	Have secretaries write down the date and time of the follow-up appointment on the back of the clinic's business card	Laura	T	T													

Before filling out the template, first save the file on your computer. Then open and use that version of the tool. Otherwise, your changes will not be saved.

Template: Project Planning Form

Team:	Project:	
Intervention – list the interventions you’ll be working on	Process Measure	Goal
1.		
2.		
3.		
4.		
5.		
6.		

Intervention Number (from above)	Change Idea	Tasks to Prepare for Tests	PDSA	Person Responsible	Timeline (T = Test; I = Implement; S = Spread)														
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