

Project Implementation Checklist

1. Project Initiation and Determination of Readiness: This “pre”-project checklist may be used during the initial call with stakeholders. It builds on the Wolff Center Project Request Form questionnaire. Problem identification, scope, availability of resources and timing are key.

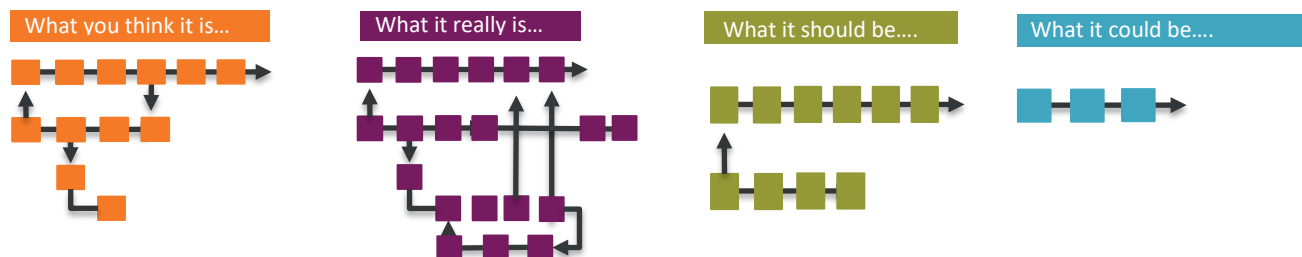
Focus	Action	Considerations/Rationale
Problem Definition <i>it is important to get an initial working definition of the problem. Although it may be adapted at a later stage, a good working definition makes it possible to describe the problem to others who will be involved in the project.</i>	<input type="checkbox"/> Describe the problem (requestor) <ul style="list-style-type: none"> <input type="checkbox"/> Reasoning/rationale for problem <input type="checkbox"/> Supportive evidence <input type="checkbox"/> Impact on organization/affected persons <input type="checkbox"/> Alignment with strategic goals <input type="checkbox"/> Discuss prior effort to solve problem – outcomes <input type="checkbox"/> Define project scope: inclusions/exclusions <input type="checkbox"/> Identify stakeholder vision for final outcome	<input type="checkbox"/> Can the issue be explained as a “problem statement” to avoid a “point of view” perception? <input type="checkbox"/> Is organizational impact linked to regulatory/patient safety issue? <input type="checkbox"/> Those affected by the problem may be considered “stakeholders” and include patients/physicians/staff <input type="checkbox"/> Project scope may include target populations/facilities/processes... <ul style="list-style-type: none"> <input type="checkbox"/> Disease specific groups <input type="checkbox"/> Specific services lines or physician groups <input type="checkbox"/> System/Hospitals/Unit or Department <input type="checkbox"/> Other
Resources <i>Role is to provide ongoing support and active engagement to help achieve progress and success from an administrative level.</i>	<input type="checkbox"/> Identify Executive Level Support <ul style="list-style-type: none"> <input type="checkbox"/> Executive Sponsor <input type="checkbox"/> Physician Champion <input type="checkbox"/> Operational Leader <input type="checkbox"/> Identify other level of support (as relevant to specific project) <input type="checkbox"/> Identify key stakeholder groups: disciplines who may be impacted by the project or need to be engaged in the process	<input type="checkbox"/> Who are critical decision makers? <input type="checkbox"/> What are their expectations with level of engagement in the project? <input type="checkbox"/> Are they willing to commit the time to support this work? <input type="checkbox"/> Are there competing priorities that might interfere with the successful completion of the project?
Communication <i>Provides the status of your project and highlights any issues or risks that require the attention of leadership</i>	<input type="checkbox"/> Define communication structure <ul style="list-style-type: none"> <input type="checkbox"/> Format (email/Teams calls...) <input type="checkbox"/> Frequency <input type="checkbox"/> Provide weekly summary of accomplishments/barriers/next steps 	<input type="checkbox"/> How frequently and what by what mode do stakeholders and leaders prefer communications to occur? <input type="checkbox"/> Are there current forums/scheduled meeting for reporting project progress?
Timeline <i>A project timeline gives visibility to a project's progress through its milestones</i>	<input type="checkbox"/> Discuss preference for project start dates <input type="checkbox"/> Determine any existing deadline for completion <input type="checkbox"/> Identify any drivers for expedited completion or potential delays	<input type="checkbox"/> Consider duration of specific project tasks/countermeasures in setting completion date <input type="checkbox"/> If project requires IT build, need early consult with EHR on projected timeframe based on priority

2. Project Fundamentals: *Once your project team's readiness is confirmed to take on a quality improvement project, the following steps will help to guide your team through the project planning or development phase.*

	Action	Considerations/Rationale
Planning & Preparation Phase	<ul style="list-style-type: none"> <input type="checkbox"/> Confirm commitments of Executive Sponsor/Physician Champion and Operational Leader if not on intake call <input type="checkbox"/> Identify "core" workgroup members <input type="checkbox"/> Determine meeting frequency and communication plan <input type="checkbox"/> Plan "kick-off" meeting for the group and schedule workgroup meetings. As facilitator and prepare agenda and minutes with follow-up action items <input type="checkbox"/> Preliminary "framing" of the work into a Project Charter <input type="checkbox"/> Draft an AIM statement using SMART methodology <input type="checkbox"/> Draft an overarching outcome measure <input type="checkbox"/> Begin a preliminary Project Work Plan <input type="checkbox"/> Create a project document repository using Teams/SharePoint <input type="checkbox"/> Determine alignment with system quality initiatives and strategic goals <input type="checkbox"/> Submit project to the Quality Improvement Review Committee (QRC) <ul style="list-style-type: none"> <input type="checkbox"/> Search for prior or concurrent work on this problem <input type="checkbox"/> Define any IT/EHR needs <input type="checkbox"/> Identify a Finance representative if needed <input type="checkbox"/> Identify any regulatory, privacy or patient safety concerns <input type="checkbox"/> Review current literature for best practices <input type="checkbox"/> Review existing policies and procedures <input type="checkbox"/> Review other relevant sources: EHR documentation (eSTATS), patient education materials (Healthwise). <input type="checkbox"/> Current State Assessment planning: <ul style="list-style-type: none"> <input type="checkbox"/> Create plan for interviews/surveys/observations/focus groups <input type="checkbox"/> Design interview or survey questions (MS Forms) <input type="checkbox"/> Customize an observation record if targeted process <input type="checkbox"/> Initiate regular sound bite communication to project leaders 	<ul style="list-style-type: none"> <input type="checkbox"/> The Project Charter at this phase is very basic with further detailing as the work evolves <input type="checkbox"/> Work group has three levels: Leadership Team/Core Work Group/Ad Hoc Members (usually specialized skills): <ul style="list-style-type: none"> <input type="checkbox"/> Determine an effective number of team members based on established goals. Studies found optimum team size is between 5-10 people <input type="checkbox"/> Successfully recruit team members with the necessary skills for the deliverable <input type="checkbox"/> SMART goals include: Specific, Measurable, Attainable, Relevant and Time-based <input type="checkbox"/> SMART Goals Worksheet <input type="checkbox"/> The Outcome Measure provides an early vision for the work, process measures are added after the current state assessment, countermeasures, and test of change <input type="checkbox"/> IT needs may be: Cerner/Epic Builds, Quality/Clinical Analytics. Data may be needed <i>before</i> the project work as baseline metrics and/or <i>after</i> implementation to monitor effectiveness. <i>Or the project itself could be an IT/EHR build.</i> Follow the online process for eRecord Request. Automated eRecord Request Form link (complete a Report Request early in the project life cycle if needed) <ul style="list-style-type: none"> <input type="checkbox"/> May request a fact finding consult with the eRecord team in advance of submitting form <input type="checkbox"/> Wolff Center Teams may involve (among others): <ul style="list-style-type: none"> <input type="checkbox"/> Data Analytics <input type="checkbox"/> Education (Patient/Staff) <input type="checkbox"/> Communication (Patient/Staff) <input type="checkbox"/> Patient Experience <input type="checkbox"/> Regulatory/Patient Safety <input type="checkbox"/> Hospital/Physician Quality <input type="checkbox"/> Research Writers

Assessment & Discovery Phase

- Perform Current State Assessment
 - Implement the methodologies/tools needed to validate the stated problem:
 - [Interviews](#)
 - [Direct Observations](#)
 - [Surveys](#)
 - [Deep Dives](#)
 - [5 Whys](#)
 - Include a compelling patient story
 - Request baseline metrics for comparison with future countermeasures
 - Create a report-out of current state findings
 - Request access to [process flow mapping](#) tool (Visio) to display workflows
 - Use other data display tools like:
 - Graphical data displays (bar graph/pie chart/line graph/run chart)
 - [Fishbone Diagram](#) (cause/effect)
 - [Spaghetti Diagram](#)
 - [Driver Diagram](#)
 - Present the Current State Assessment with recommendations to the leadership team and workgroup
 - Validate the **actual problem** with leadership and the team
 - Continue building out the Project Charter and Project Work Plan
 - Identify subject matter experts and specialized team members
- Defining the actual PROBLEM is the most important task of any project. Need to understand the root causes responsible for the present situation that can guide future state design:
 - Have local project owner inform staff of workflow observation plans and make necessary introductions. Reinforce observation of process NOT people
 - Consider survey using Teams Forms or group Deep Dives for large scale information gathering process
 - Engage Wolff Center Quality Analytics Team, if applicable, to identify if data is available in *existing* report or if the process for [new report request](#) will need to be executed
 - Relevant baseline data provides comparative results to later benchmark whether your interventions were successful
 - Investigate if existing CLIQ data/dashboard available
 - If appropriate, share the Current State Assessment with the staff being observed. Continue to involve frontline staff to facilitate later adoption of change



Every Process Has at Least Four Versions

3. Project Implementation: *As your quality improvement project completes the planning phase of the PDSA Cycle and actionable steps are identified, the following steps will guide your team through the testing, implementation and evaluation phases.*

	Action	Considerations/Rationale
Ideation and Testing Phase	<ul style="list-style-type: none"> <input type="checkbox"/> Develop the Ideal, Future or Target State WITH stakeholders and the front-line staff who actually do the work <input type="checkbox"/> Include Human Factors Design and “Poka-Yoke” <input type="checkbox"/> Using the Current State Assessment and the Target State, perform a Gap Analysis <input type="checkbox"/> Consider a Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis <ul style="list-style-type: none"> <input type="checkbox"/> Evaluate barriers to long term sustainability <input type="checkbox"/> Determine the countermeasures or interventions need to “close the gap” between the current and target state <input type="checkbox"/> Evaluate feasibility using an Impact/Effort Matrix <input type="checkbox"/> Review the Toyota Production System Principles <input type="checkbox"/> Following the “PLAN-DO-STUDY-ACT” cycle (PDSA), design a “test of change” based on the pertinent countermeasures <ul style="list-style-type: none"> <input type="checkbox"/> Draft a prototype of the change <input type="checkbox"/> Identify resources needed to test <input type="checkbox"/> Determine the location and duration <input type="checkbox"/> Define measures of a successful test of change <input type="checkbox"/> Solicit staff feedback on the change <input type="checkbox"/> Review post-test of change data with baseline <input type="checkbox"/> Update Project Charter/Work Plan to include Process Measure and Balancing Measures <input type="checkbox"/> Present findings to key stakeholders and prioritize the objectives 	<ul style="list-style-type: none"> <input type="checkbox"/> The ideal or target state forms a shared vision or ultimate goal of your improvement process and provides you with an end point to work towards. It should be created by the team with guidance from the facilitator and the senior management and it should be challenging! Describe not what the process SHOULD be but rather what it COULD be <input type="checkbox"/> The “Voice of the Customer” is critical in this phase <input type="checkbox"/> Poka-Yoke is part of TPS and means “mistake-proofing” (to make it harder for error to occur or makes it highly visible if it does) <input type="checkbox"/> The Gap Analysis compares the current state with an ideal state and highlights the deficits between the two and creates a series of actions that will bridge the identified gap <input type="checkbox"/> SWOT Analysis can identify barriers or “landmines” and help you to mitigate them preemptively <input type="checkbox"/> Be aware of the downside of assumptions and non-validated information in designing the test of change
Implementation Phase	<ul style="list-style-type: none"> <input type="checkbox"/> Develop a high-level Project Tracker such as a Gantt chart with milestones/timelines <input type="checkbox"/> Contact System Policy Committee for new policy or revision to support the new process or process change <input type="checkbox"/> Engage WC Internal Communications liaison to design a communication strategy to raise awareness and provide information brand or promote the new/revised process <input type="checkbox"/> Initiate the eRecord Report Request Form for process effectiveness tracking in the next phase 	<ul style="list-style-type: none"> <input type="checkbox"/> Establishes a clear strategy and actionable and timed objectives <input type="checkbox"/> Ensure the change is weaved into operations, structures, policies, job descriptions... <input type="checkbox"/> Communication directly from Clinical/Administrative leaders through their departmental/division meetings and newsletters if relative <input type="checkbox"/> Socialize to leaders and key stakeholders: presidents/CNOs/VPMA/VP Ops

Evaluation Phase	<ul style="list-style-type: none"> <input type="checkbox"/> Perform high-frequency surveillance in the immediate post-implementation period <input type="checkbox"/> Develop an ongoing process/project maintenance plan with periodic review: <ul style="list-style-type: none"> <input type="checkbox"/> Identify key processes that need tracked <input type="checkbox"/> Document timeframes or intervals <input type="checkbox"/> Designate who will collect the data <input type="checkbox"/> Review outcome and process measure data with key stakeholders on a regular basis <input type="checkbox"/> CELEBRATE SUCCESSES! 	<ul style="list-style-type: none"> <input type="checkbox"/> Allows for timely response to the data if it shows “drifting” or trends in suboptimal performance. Intensity may gradually be reduced, but ongoing assessment of how the process is functioning is absolutely necessary
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4. Project Conclusion: *This brings the project to an end. It is also a time for future growth (spread) and holding the gains (sustainability). It is an evaluation of the project and its management. It is a time of reflection on lessons learned.*

Spread Phase	<ul style="list-style-type: none"> <input type="checkbox"/> Develop the Spread/Deployment of Best Practice package in collaboration with leadership/stakeholders from the spread sites <ul style="list-style-type: none"> <input type="checkbox"/> Define core elements of the process/project <input type="checkbox"/> Identify local Spread champions for implementation plan 	<ul style="list-style-type: none"> <input type="checkbox"/> Spread is learning that takes place in one part of the organization that is actively shared and acted on by all parts of the organization <input type="checkbox"/> Will look different at different sites <input type="checkbox"/> Presenting the “core” elements allows for some local customization needed for the spread site resources and infrastructure and facilitates adoption
Sustainability Phase	<ul style="list-style-type: none"> <input type="checkbox"/> Maintain focus on the fundamentals from the project planning, implementation, and evaluation phases: <ul style="list-style-type: none"> <input type="checkbox"/> Building the shared vision and continually SHARING it <input type="checkbox"/> Designing for sustainability in the early test of change <input type="checkbox"/> Engaging those who perform the work <input type="checkbox"/> Educating and reinforcing the change <input type="checkbox"/> Monitoring the outcomes both post-implementation and ongoing <input type="checkbox"/> Providing swift course correction for any drifting of results 	<ul style="list-style-type: none"> <input type="checkbox"/> Sustainability planning is ideally started at the initiation phase of the project. When choosing a target for change, consideration of organizational factors such as strategic priorities, staff engagement, and leadership support are integral to long-term success <input type="checkbox"/> Sustainability is supported by: <ul style="list-style-type: none"> <input type="checkbox"/> Clear advantage compared with current ways <input type="checkbox"/> Compatibility/integration with current systems <input type="checkbox"/> Staff voices “this is the way we do it”



Core Principles

1. Keep it simple
2. Design for the rule not the exception
3. Be passionate about improvement
4. Transparency is a must
5. Always explain the “why”
6. Be kind and courageous
7. The “how” really matters
8. Share best strategies openly
9. Locking arms moves mountains
10. Engaged employees drive excellent outcomes
11. Leadership cannot be delegated
12. Relentless commitment to keeping patients safe
13. Excellent data makes good decisions easy
14. Excellent quality costs less
15. Always reach into the front lines and ask
16. Improvement is local | Priorities are global
17. Teamwork is the only approach

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