

Project Title:

Improvement Advisor: **Insert name here**
PI Director / Lead IA: **Insert name here**
Mentor: *Insert name here*



Project Planning Charter

Project Name:	Charter Date:
Improvement Advisor:	Facility:
PI Director / Lead IA:	Mentor:

Project SMART Goal:

Problem Statement and Business Case		Project Team
Problem Statement		<ul style="list-style-type: none"> Sponsors: Champions: Project Co-Leads [Process Owners]: Front-Line: Project Oversight:
Customer Benefit		
Expected Financial Impact		
Other Business Benefit		

Project Timeline and Key Milestones	Project Measures
<ul style="list-style-type: none"> Assess: <ul style="list-style-type: none"> Baseline Data Obtained Project Kick-Off Project Charter Completed Process Map Completed Voice of the Customer Obtained Identify Changes: <ul style="list-style-type: none"> Cause and Effect Developed Start PDSA Action Plans Test: <ul style="list-style-type: none"> PDSA Action Plans Completed Implement: <ul style="list-style-type: none"> Sustainability Plan Completed Training and Communication Plans Financial Impact Validated by Finance Project Storyboard Complete and Submitted Spread Plan 	<ul style="list-style-type: none"> Outcome Measures: Process Measures: Balancing Measures:
	Project Scope
	<ul style="list-style-type: none"> In Scope: As Needed: Out of Scope:

Project Selection: How Does the Project Support Organizational Goals?

[Insert your medical center or regional driver diagram showing how this project fits in the organizational objective]

Voice Of Customer - Critical to Quality (CTQs)

Customers

List Customer Groups	List Individual Customers (if applicable)
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VOC Translation Matrix

Customer Comments	CTQs – Requirements & Spec Limit
<i>Customer Want</i>	Requirement for your project w/ Spec Limit

Define “AS IS” Process: SIPOC or Process Map

Supplier

•Dennis D.

•Leaders from all levels

•PIEC

•IA, Champions

Input

•National PI Program Assessment Request

•Project Work Needing IA Support

•People to be trained
 •IA
 •Ripple
 •SBC
 •Storytelling

•KP Stagey

•Teams request for assistance

Process

Identify Work Needed to Support Operations

Align operations requests to KP Strategy

Assess Programs Ability to deliver work & create enhance missing PI Program elements

Identify needed resources to complete the work and train if required

Provide ongoing coaching & support to project teams

Assign Resources, track progress & report to leadership

Track progress against PI Program Development Plan and report to PIEC

Output

•Driver Diagrams

• Certified IAs

• Completed projects with meaningful, measurable results

• Status reports

• certifications

• project updates

• Calendar of Training events, Council meetings & peer group meetings

•Project teams with experience

•Managers using PI tools

Customer

PIEC

•Champions, Department Managers

•IA, Project Teams

•National PI

Example Only - Fill in With Your Data

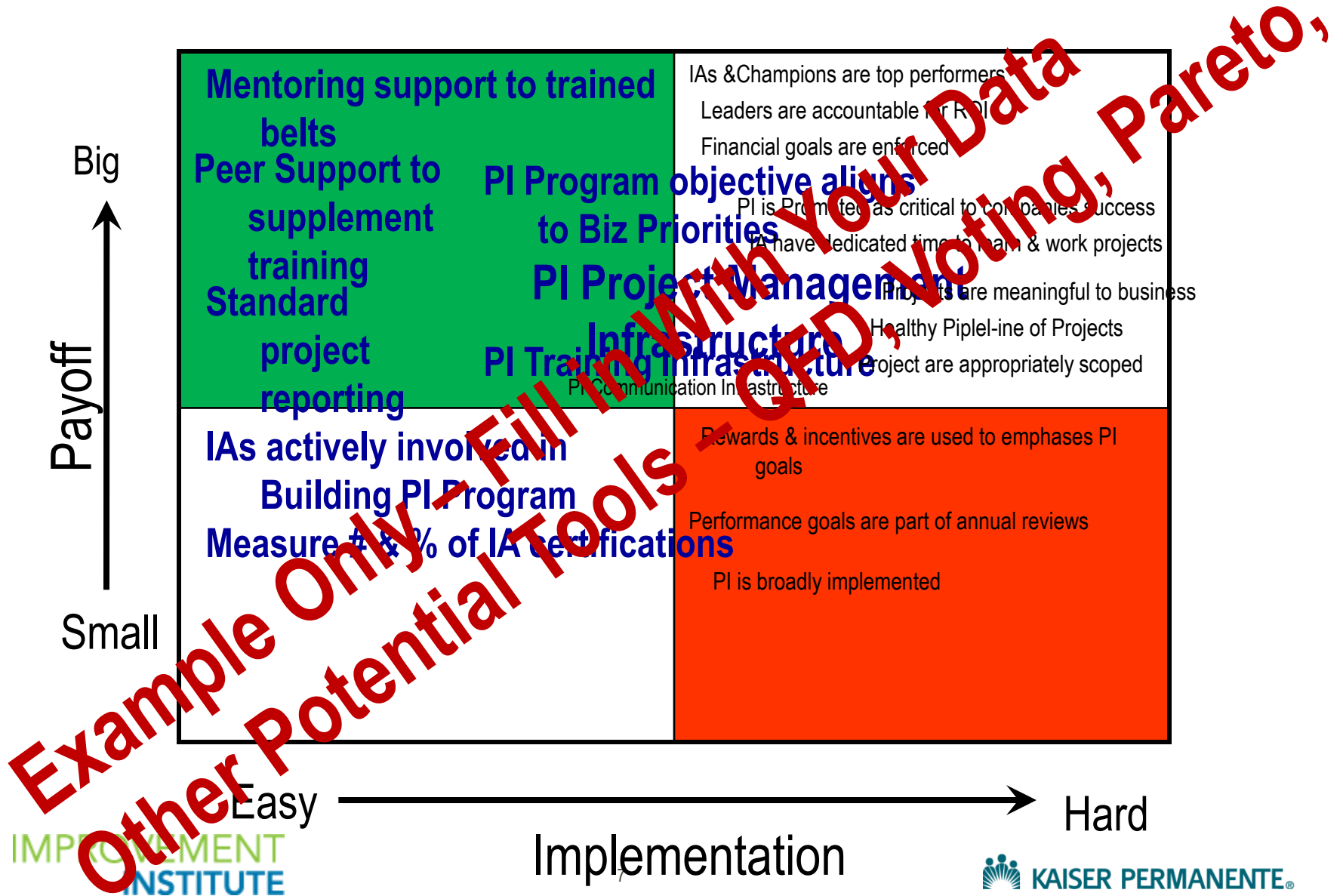
Current Process Capability

- Use run or control charts or
- Defect Per Million Opportunity (DPMO) L1 Spreadsheet or
- Histogram with USL & USL and Sigma Level
- Add one-sentence take away note for each chart shown]

Identify Causes of Variation –Fishbone or CTQ Tree



Prioritization of Causes – Payoff Matrix

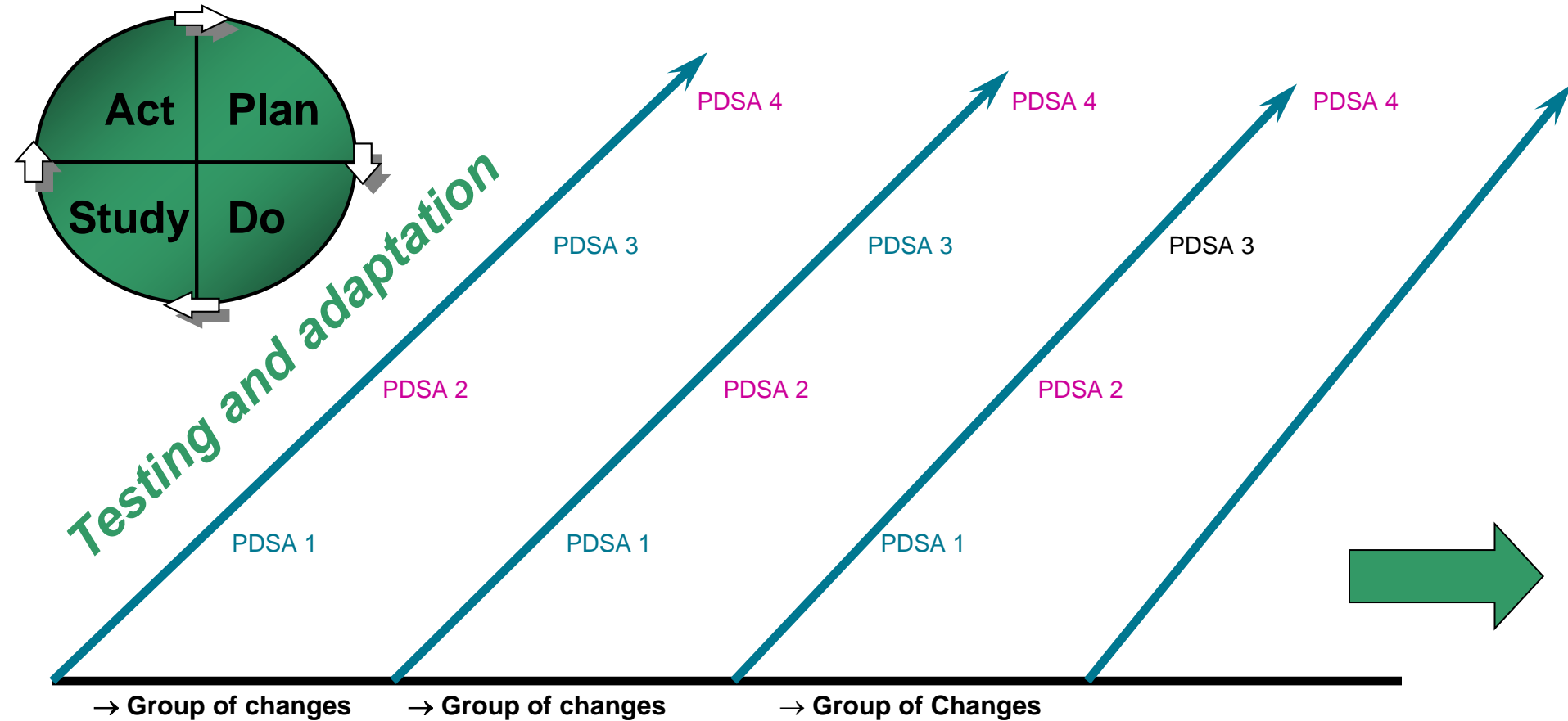


What Changes Lead to Improvement?

<i>Change Concept</i>	<i>PDSAs</i>	<i>Adopt, Adapt, Abandon?</i>
[Insert the change concept. These are in the Improvement Guide Appendix]	[list PDSAs the team brainstormed and decided to test]	[Indicate if it was Adopted, Adapated, or Abandoned and Why. List the results, conclusion, and decision for the PDSA]

This slide is OPTIONAL. Use slide 6 or slide 7 to summarize your changes. This format is best for a project with fewer changes.

What Changes Lead to Improvement?



This slide is OPTIONAL. Use slide 6 or slide 7 to summarize your changes. This format is best for a project with many changes. Group PDSAs and enter the specific changes and the group names below.

How Will We Know a Change Is an Improvement?

Family of Measures

Measure	Operational Definition (How is the measure calculated?)	Type (outcome, process, balancing)	Data Collection Plan (How will you collect data & how frequently)

How Will We Know a Change Is an Improvement?

- Insert your annotated run or control chart
- Formatting guidelines:
 - Need one chart for each measure
 - Put only one chart on each slide
 - Annotate your run or control charts with PDSAs
 - Indicate, by using an arrow, which way is improved results (up or down).
 - Update charts with most current data
 - Do not use any abbreviations.
- Add one-sentence take away note for each chart shown

Providing High Value Care to our Members: Financial Impact

- **State the quality/service impact or other benefit of your work to members.**
- **Describe financial impact of your project here.**
- **You may wish to use the Financial Impact calculator, which is on the PI wiki, and copy the results here**

Sustainability Plan

Process Owner(s):

Daily Oversight:

Locations:

	Item	Action	Responsible Person	Frequency	Issues / Comments
Bundle of Actions	Action 1				
	Action 2				
	Action 3				
Data Analysis & Results	Gather Data				
	Analyze Data				
	Report Results				
Communication	Project Team				
	Department Leaders				
	Leadership				
	Other				
Training	Project Team Meetings				
	Huddles				
	Other				

Champion Signature:

Process Owner Signature:

Moving Forward

- **Key to Success**
 - [Describe keys to success, key decisions or actions, aha moments, etc.]

- **Barriers**
 - [Describe barriers encountered and how they were overcome]

- **Lessons learned**
 - [Lessons learned, and suggestions to people/org who will do similar projects]

- **Next steps**
 - [State plans for continuous improvement
 - Plans for spread, if applicable
 - Next initiatives related to a PI portfolio, if applicable
 - Other]

Project Results Summary

Lever: (Enter one sentence describing the project; begin with a verb. Include the quality/service impact or other benefit to member)

"Evidence"/Expert Opinion/Basis: (Enter 1-2 lines summarizing results. This is the “hook” that makes the reader want to read more. Include numbers if possible (percent, dollars, etc.) and region if available.)

Key Changes Applied:

- ✓ Briefly list the most key changes that were tested and adopted

Source	<ul style="list-style-type: none">• (enter names of any literature or other published sources used to support these changes; if none, state “none”)
Key Assumptions	<ul style="list-style-type: none">• (list any key assumptions made about the changes tested or implemented)
Key Enablers	<ul style="list-style-type: none">• (briefly describe what helped you achieve the results, including key team members, leadership support, etc.)
Sustainability Plan	<ul style="list-style-type: none">• (briefly list two or three of the most critical items from the sustainability plan)
Contact	Improvement Advisor: enter PI Director /Lead IA: enter (add other key contacts): enter

Insert copy of outcome measure control or run chart here and remove this text box

Key Improvement Metrics:

Results

(enter what was measured)	(Enter specific results achieved)
(enter what was measured)	(Enter specific results achieved)
(enter what was measured)	(Enter specific results achieved)
(enter what was measured)	(Enter specific results achieved)

Attestation

With my electronic signature below, I attest the following:

- I have reviewed this document and confirm that it contains no protected health information (PHI), as defined here --
http://dms.kp.org/docushare/dsweb/Get/Document-1223053/What_is_PHI_handout.pdf
- I understand that failure to comply with KP policies, federal regulations, and state laws and regulations including those surrounding use of PHI can lead to disciplinary action – up to and including termination, personal fines, civil and criminal penalties and suspension of professional licenses.
- I have read the Principles of Responsibility, Kaiser Permanente's Code of Conduct -- <https://wiki.kp.org/wiki/display/por/Home>

Signature _____ Date _____