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.

IHI's QI Essentials Toolkit includes the tools and templates you need to launch and manage a successful improvement project. Each of the nine tools in the toolkit includes a short description, instructions, an example, and a blank template. NOTE: 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.

- Cause and Effect Diagram
- Driver Diagram
- Failure Modes and Effects Analysis (FMEA)
- Flowchart
- Histogram
- Pareto Chart
- PDSA Worksheet
- **Project Planning Form**
- Run Chart & Control Chart
- Scatter Diagram

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 drivers on which the team will focus. "Drivers" are key leverage points in the system that are your opportunities to influence the outcome and achieve your aim.
   - Tip: We recommend using a tool called a driver diagram (one of the tools in the QI Essentials Toolkit) to establish primary and secondary drivers with your team.
3) Next to each driver, identify a process measure and goal as follows:
   - Process measure: Define in specific terms how you will measure the driver, to evaluate the results of your tests of change.
   - Goal: State a measureable goal for that driver (i.e., define in specific terms what you want the results to be after your changes).
4) Fill out the grid for each driver 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.

Driver – list the drivers 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.		

Driver 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**												

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Template: Project Planning Form

Team:	**Project**:

Driver – list the drivers you'll be working on	**Process Measure**	**Goal**
1.		
2.		
3.		
4.		
5.		
6.		

Driver 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