QI Basics

**Work Plan**

The QI Work Plan is a task monitoring and documentation tool to keep your quality improvement (QI) project on track and to help the team ensure there is follow through and completion of assigned work.

# **Introduction**

# Managing your project and ensuring that tasks are completed is one of the primary tasks of the project or team leader. This tool is designed to track the work and provide transparency to the team of what work has been planned, is in progress, or has been completed.

# **How to Use**

This tool is most often updated and monitored by the team or project leader. It should be reviewed and updated at each meeting, and team members should have visibility and access to it at all times so that each member is aware of their assigned work, responsibilities, and deadlines for tasks that will help the team advance toward its goals. As each task or work assignment arises, be sure to add a new row for that. You can also pre-plan your project work and include the major milestones and the sub-tasks that will lead up to accomplishing those major steps.

* **Task/Objective**: Enter the name of the task or objective. You may also choose to break major tasks into sub-tasks by indenting, numbering and adding additional rows beneath the primary task.
* **Detailed description**: A brief narrative or some details to help clarify the task or objective.
* **Assigned to**: Enter names of individuals rather than roles to ensure accountability for assigned work. On occasion, you may have work assigned to groups or subgroups within the team.
* **Due date**: The date the task is expected or required to be completed.
* **Actual completion date**: Enter the actual date of completion, which can be compared with the due date to assess if the project is on track or if adjustments need to be made to the project timeline.
* **Notes/Comments**: Any additional narrative about progress, barriers, and resources needed for completion, etc.

An [example](#example) QI Work Plan is provided at the end of this document for your reference.

## QI Work Plan

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| **Task / Objective** | **Detailed description** | **Assigned To** | **Due Date** | **Completion Date** | **Status** | **Notes / Comments** |
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## Example QI Work Plan

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| **Task / Objective** | **Detailed description** | **Assigned To** | **Due Date** | **Completion Date** | **Status** | **Notes / Comments** |
| Hold initial project kickoff meeting | Gather initial 5 QI team members together | Juan Melendez, Team Leader | Date to be set | TBD | Not started |  |
| Create communication plan | To be done as a QI team together. Template started by team leader | QI Team | Date to be set | TBD | Not started |  |
| Hold Process Mapping exercise to document hypertension encounters. Utilize 5 Whys tool | To be done as a QI team.  | QI Team | Date to be set | TBD | Not started | Determine any additional staff that need to be included |
| Create PDSA document based on process mapping and 5 whys analysis | To be done as a QI team | QI Team | Date to be set | TBD | Not started | Create PDSA document based on process mapping and 5 Whys analysis |
| Report back to leadership on QI team progress after 2nd week of work | Leadership has requested a bi-weekly update for the first month of our QI team project | Juan Melendez, Team Leader | Date to be set | TBD | Not started | 5-10 minute project summary to be given at leadership meeting. Need to prepare remarks. Add this task to communication plan |