

Quality Improvement Basics

QI Charters and Workplans

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Objectives

After completing this module, participants will be able to

- Identify common components found in a project charter
- Discuss what is needed to build an effective workplan



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QI Charter: Organizing Around the QI Goal/Aim



The QI charter is ultimately based on the goal or aim you are seeking

- Problem statement
 - Dates
 - Specifics
 - Quantify the problem
 - Difference between current/desired performance
 - Problem impact
- Background
- Goals
- Scope
- Timeline
- Team roles and responsibilities
- Resources required
- Barriers
- Approvals
- Partners

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QI Project Charter Form



QI Basics	QI Project Charter
<p>The QI Project Charter organizes the framework of your quality improvement (QI) project and provides an summary for your project team, sponsors, and constituents.</p> <p>Adapted from:</p> <p>Introduction A project charter states the goals, scope, timing, milestones, and team roles and responsibilities for a QI project. The charter may be developed by leadership at an organization and then handed off to the QI team leader. It also may be developed by the QI team leader and then approved by leadership. The charter sets forth the scope of the work and what it is to be accomplished as part of a QI project.</p> <p>How to Use This tool should be completed either by leadership at an organization or by the project leader with input and review by the project team. If it is not developed by leadership, it should have their approval before moving forward.</p> <ul style="list-style-type: none">• Step through each of the fields in the template below and follow the recommended descriptions of what to include in each field.• After completing the individual fields, review your QI Project Charter as a complete document and confirm that what your QI team will be working on and what they'll achieve is clearly described. Anyone unfamiliar with your project should be able to read the document and gain an understanding of the project and its scope. <p>An example QI Project Charter is provided at the end of this document for your reference.</p>	<p>QI Project Charter</p> <ol style="list-style-type: none">1. Name of project: Enter name of project here.2. Problem statement <u>What</u> is the nature of the work and what are you attempting to accomplish? Elements of your problem statement may include:<ul style="list-style-type: none">• Specific dates in which the problem occurred (month/years)• Specifics of the problem• Quantify the problem• Differences between current and desired/expected performance• Impact of the problem on patients, organization, staff, etc.3. Background Describe the history and context of your project.4. Goals <u>What</u> improvements are you seeking to achieve?5. Timeline <u>When</u> are the start and completion dates for your project and any major milestone dates?6. Team roles and responsibilities Enumerate the team members and specific roles. This can be done directly in the charter or utilizing the Team Roles and Responsibilities Template as an addendum to the Charter. Some typical roles are listed below.<ul style="list-style-type: none">• Project sponsor• Team leader• Meeting facilitator• Group contributor• Data specialist• Systems specialist• Scribe / Note taker7. Resources required Itemize specific resources, including staff time, meeting rooms, equipment, etc.8. Barriers Include known barriers at the outset of your project.9. Approvals List any approvals that you know of, such as managerial approval for staff time devoted to your project.

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QI Work Plan

- The work plan is designed to outline specific activities that are critical to the success of your project and help you stay on track.
- The fields in the workplan include:
 - Task/Objective
 - Detailed description
 - Assigned to
 - Due date
 - Actual completion date
 - Status
 - Notes/comments



QI Work Plan cont.

QI Basics QI 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.

Adapted from:

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.

Example QI Work Plan

Task / Objective	Detailed description	Assigned To	Due Date	Completion Date	Status (not started, in development, complete)	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	
Conduct Process Mapping to document hypertension encounters.	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 PSDA 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 PSDA document based on process mapping and 5 Whys analysis
Report back to leadership on QI team progress after 2 nd 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



Why do projects fail?

- Objective not clear
- Lack of leadership support
- Lack of clear roles and responsibilities
- Scope creep
- Doesn't add value to the organization
- Not enough resources
- Poor communications
- Partners not on board
- Barriers not anticipated or managed
- Lack of project management, project plan, and monitoring and controlling

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In Summary

- Why its important to use a team approach when working on quality improvement
- What the barriers are to team performance
- What team leaders can do to empower team members to participate in quality improvement efforts

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Stratis Health is a nonprofit organization that leads collaboration and innovation in health care quality and safety and serves as a trusted expert in facilitating improvement for people and communities.

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