

Quality Improvement Basics: Prioritization

Slide 1 Objectives

After completing this module, participants will be able to

- Describe how to identify criteria to use in prioritizing quality improvement opportunities.
- Use a prioritization matrix to decide which opportunity(ies) to pursue first.
- Create and use a PICK chart.

Slide 2 Prioritization Matrix

If an organization has a culture of improvement, they will always have more opportunities than they can tackle at one time. The challenge is how to pick which projects are priority and should be implemented first. Opinions on priorities will vary between people in the organization depending on their viewpoint. Therefore, it is helpful to have a structured and objective approach to help identify projects to work on first. Prioritization matrices are relatively simple tools to help accomplish this.

A prioritization matrix helps the team look at a diverse set of opportunities and apply criteria to establish priorities. Because you set a numerical value associated with how well the opportunity or idea fits each of the criteria, using a matrix helps quantify the decision of what to work on first. This can prevent choosing an opportunity based on individual preference or on the views of the person who can mount the most convincing argument. It is also helpful as a future reference if the team wants to look back and see why they chose a certain opportunity over others. While there is not a defined set of criteria for a prioritization matrix, we present ideas in this module for organizations to consider. One of the most valuable aspects of a prioritization matrix is that it creates a platform for people to discuss the pros and cons of each opportunity.

Slide 3 Example Prioritization Criteria

This slide shows examples of prioritization criteria. Many are related. You can determine which are the most relevant criteria to consider for your organization – to help you identify priority opportunities.

- Strategic alignment: Is the topic under consideration aligned with the organization's strategic plan and priorities?
- Actionable or feasible: Are there are ways to address the issue and is there room to make any meaningful improvement?
- Community readiness: is there any momentum within the organization/community to help move this issue forward and will it be seen as important?
- Cost: what is the cost incurred by our organization each time this issue occurs?
- Demand: How much interest is there in solving this problem? Is there a strong expressed need to address this? This is related to leadership support, organizational readiness, and other criteria listed. Establishing demand is key, and with demand, there is increased likelihood the initiative will succeed.

- Health equity: does the topic advance health equity?
- Integration: is there any opportunity for collaboration or building on existing initiatives, or would the project be considered a duplication of efforts?
- Leadership support: are key leaders on board with pursuing this opportunity and shepherding it through the QI process and working to overcome barriers that arise?
- Potential impact: Is there is reason to believe that interventions will be successful in having a significant impact on one or more specific populations?
- Prevalence: What is the frequency at which this issue arises in our organization?
- Resources: Are there resources such as funds, staff, or expertise readily available to take on this project? If not, can they be acquired?
- Risk: what is the level to which this issue poses a risk to the well-being of our patients/customers?
- Urgency: Does this issue need to be addressed within the next one, to maybe three years?

Slide 4 Creating a Prioritization Matrix

To create a prioritization matrix, create a table with the opportunities or ideas listed down the far-left column. Then indicate the criteria your team has chosen across the top of the remaining columns.

The team then needs to create a rating scale for the criteria. This may be a 1-5 scale for example, with higher numbers being higher priority. The important thing to keep in mind is that rating is subjective and meant to be a guide to stimulate discussion. With that said, it is also important to remind each of the team members not to rate their favorite idea the highest but instead to make sure they are truly rating each idea based on the criteria.

Once the matrix is completed, scores can be totaled for each opportunity. Typically, several opportunities will end up with similar scores. Sometimes the team will decide that certain criteria are weighted more than others. Further discussion will be needed to make a final selection of which opportunity to pursue.

The link provided on this slide is for a prioritization matrix that you can use and adapt as needed.

Slide 6 Additional Factors to Consider

As mentioned, often a prioritization matrix will yield two to three opportunities that are identified as highest priority. Additional factors need to be taken into consideration to determine which one to choose first.

The questions listed on this slide are examples for the team to consider in making that final choice.

- Are there existing standards or guidelines that can help with this initiative?
- Are there measures available to help monitor progress, or would we have to create them?
- Is this a topic that's publicly reported and therefore important to our organizations image?
- What type of changes will be involved, what staff will be most affected and what training needs will be needed?
- Do we have any champions for this initiative or anyone who has passion for the topic?

- And finally, if we do work in this area will it have an impact in any other way in our organization.

Slide 7 PICK Chart

Another type of prioritization tool is a PICK Chart. A PICK chart is used to categorize improvement ideas. An easy way to create a pick chart is to draw a 2 x 2 grid either on a whiteboard or large paper flipchart. The name PICK comes from the nicknames of the four quadrants; Possible, Implement, Challenge, and Kill. Individual improvement ideas can be written in virtual whiteboard apps, or on sticky notes, and team members can place the ideas into the quadrant where they feel the idea best fits. Sometimes when you're working with a PICK chart it's helpful not to put those nicknames into the quadrants because it's hard for somebody to put an idea in quadrant labeled Kill. Instead, it may be easier to think of the idea as something that's hard to do with low payoff. A couple things to keep in mind if you're leading a team in creating a PICK chart. The first is to not let people put their idea on a line, they need to decide what quadrant it goes in. The beauty of virtual entries or sticky notes is that they can always be moved as the team has a chance to discuss each idea. The other thing is to keep it simple and not have further differentiation within each box. For example, don't encourage people to be too analytic about where they initially place their sticky notes within the box, but instead just choose one of the four boxes.

A PICK chart can be a helpful tool for deciding what to work on first because the ideas that end up in the upper left corner, the implement or just to do it corner, are likely a good place to start. The team can then start looking at some of the ideas in the upper right corner that are more difficult but are felt to have a high payoff. The ideas in the lower left corner are not a priority to pursue and the ideas in the lower right corner are things that should likely not be considered.

Slide 8 In Summary

In summary:

- There are tools that can support quality improvement teams in prioritizing opportunities. A prioritization matrix or PICK chart are examples of tools to help make quantifiable team-based decisions.
- With a prioritization matrix, a table is created that lists opportunities being considered and the criteria the team determined important to judge which areas to prioritize. Common criteria include such items as relevance or importance to the organization and customers, feasibility, cost-benefit analysis, and impact.
- The team works through each opportunity and applies the same criteria to each, and then discusses the results and makes decisions.
- Another prioritization method is a PICK Chart, where ideas are placed in four quadrants based on feasibility and impact. This is another method to help quantify decisions and help teams discuss the pros and cons of each opportunity.