

Documentation Tools

Project Planning Worksheet

The Project Planning Worksheet is a useful tool for planning an entire improvement project, including a listing of all of the changes that the team is testing, all of the Plan-Do-Study-Act (PDSA) cycles for each change, the person responsible for each test of change, and the timeframe for each test. The form allows a team to see at a glance the overall picture of the project.

Directions

- Use the Project Planning Worksheet to help your team plan and keep track of an entire improvement project.
- At the start of the project, state the aim and the goal of the project.
- List the changes you are testing, and the PDSA cycles for each change.
- Assign an individual responsibility for each change.
- Estimate the time frame for each cycle.
- As the project continues, update the Project Planning Worksheet.

Example

Aim: To redesign our system of care for people with asthma to increase symptom free days by 30%, and increase patients on appropriate anti-inflammatory medication by 75% in pilot clinic and in 4 satellite clinics. Measures (goals): 60% of patients will report a significant increase in symptom free days; 90% of patients will have an asthma action plan on the chart, 90% of patients will use a form of self-management at home, and patient satisfaction with asthma care will increase by 25%.

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Driver Number (from above)	Change to Test	Person Responsible	Timeline ('t' = test; 'i' = implement, 's' = spread)													
			Week													
			1	2	2	4	5	6	7	8	9	10	11	12	13	14
1	Implement follow-up for all of Dr. Martin's and Dr. Rowe's pts	Ken, Sue														x
1	Teach self-management follow-up to next clinics	Sue												x		
2	Implement collaborative goal setting with all pts	Dr. Smith											x			
2	Modify process for collaborative goal setting and contracting and test for 5 patients	Dr. Jones, Sue				x										
2	Implement contracting for Dr. Rowe's pts	Sue					x									
2	Teach contracting to all other clinic physicians	Clinic Director, Dr. Smith							x							
3	Expand use of Asthma Action Plan to all adult patients in Clinic B and C	Sue, Clinic Director											x			