CHARTER FORM

Name:

Team Members:

Project Title:

University/Organization Name:

Health System Sponsor Name:

What are we trying to accomplish?

Aim statement (How good? For whom? By when? 1-2 sentences):

Problem to be addressed (Defines WHAT broadly; 2-3 sentences)

Reason for the effort (Defines WHY; 4-5 sentences)

Expected outcomes/benefits (Defines WHAT specifically, still not HOW; 3-4 sentences)

How do we know that a change is an improvement?

(Identify outcome, process, and balancing measures; 4-5 sentences)

What changes can we make that will lead to improvement?

(Initial changes, barriers, key stakeholders; 4-5 sentences)

Read the following statement and check the box below before submitting this charter to the IHI Open School.

☐ *I certify that my faculty advisor has reviewed and approved this charter.*

Charter Assessment

What are we trying to accomplish?	Needs Improvement	Meets Expectations	Exceeds Expectations
Aim statement is clear and answers how good, by when, and for whom.			
Problem to be addressed clearly justifies need for improvement.			
Identifies aspect of care that will be improved and subsystems that will be affected.			
The impact (positive *and* negative) on patients is clear.			
Supportive background information is provided.			
Specific objectives and numerical goals are clearly defined.			
Project can be completed within time frame.			
Addresses anticipated products, tools, and deliverables that will be used in process.			

How do we know that a change is an improvement?	Needs Improvement	Meets Expectations	Exceeds Expectations
An appropriate family of measures is identified (minimum of 1 outcome measure, 2-3 process measures and a minimum of 1 balancing measure).			
Measures identified are directly related to the project description, objectives, and goals.			
Each measure is appropriately operationally defined.			
Data collection on metrics is reasonable and practical given scope of QI project.			

What changes can we make that will lead to improvement?	Needs Improvement	Meets Expectations	Exceeds Expectations
Initial changes to be tested are clear and well defined.			
Specific strategy/methodology (i.e. driver diagram) used in selecting change is identified and explained.			
Project constraints/barriers are defined including how they will be addressed.			
Identifies key stakeholders and explains their role in the process.			

PLAN DO STUDY ACT (PDSA) FORM

Cycle #:

Start Date: **End Date:**
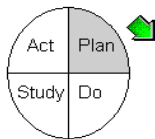
Project Title:

University/Organization Name:

Health System Sponsor Name:

Objectives of this Cycle:

☐ Test a Change

☐ Implement a Change

☐ Spread a Change

Short objective of cycle:

PLAN

Act | Plan
Study | Do

Test/Implementation Plan:

What change will be tested or implemented?

How will the change be tested or implementation be conducted (consider small scale early)?

Who will run the test or implementation?

Where will the test or implementation take place?

When will the test or implementation take place?

- -

Predictions:

1.

2.

3.

4.

Data Collection Plan:

What information is important to collect?

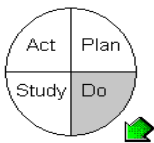**Why is it important?**

Who will collect the data?

Who will analyze the data prior to Study?

Where will data be collected?

When will the collection of data take place?
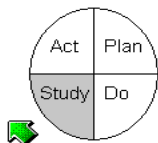
How will the data (measures or observations) be collected?

DO

Observations:

Record observations not part of the plan:

Did you need to tweak the original Plan?

Begin analysis of data (graph of the data, picture):

STUDY

Questions: Copy and paste Questions and Predictions from Plan above and evaluate learning. Complete analysis of the data. Insert graphic analysis whenever possible.

1. **Prediction:**

   Learning (Comparison of questions, predictions, and analysis of data):

2. **Prediction:**

   Learning (Comparison of questions, predictions, and analysis of data):

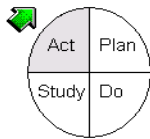3. **Prediction:**

   Learning (Comparison of questions, predictions, and analysis of data):

4. **Prediction:**

   Learning (Comparison of questions, predictions, and analysis of data):

Summary (Look at your data. Did the change lead to improvement? Why or why not?):
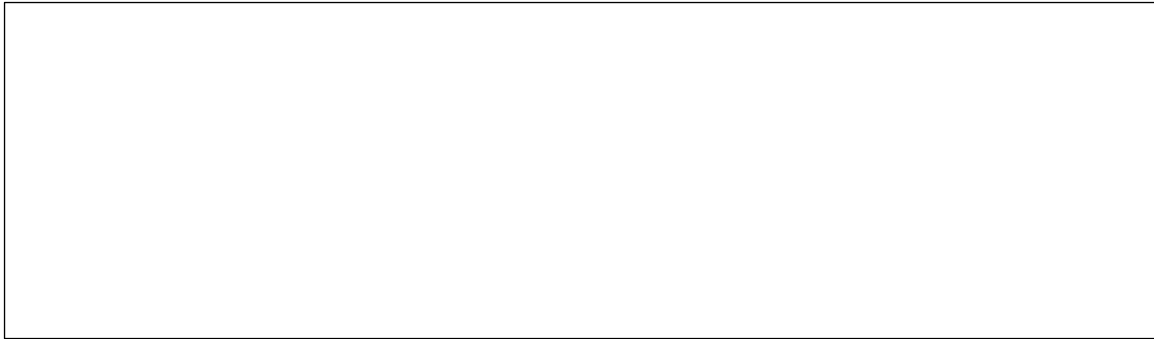

ACT

Describe next PDSA Cycle: Based on the learning in "Study," what is your next test?

Problem Description
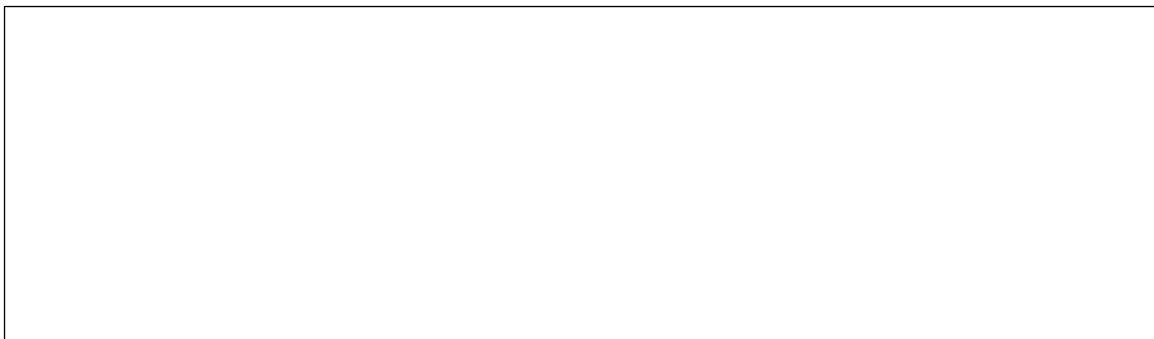

Describe Current Process

Identify Root Causes

Proposed Solution and Action Plan

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Operationalizing Action Plan

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Data Collection – Outcome Measure and Method of Ascertainment

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Analysis

Actions on Lessons Learned

PDCA/ PDSA	7 STEP	7 QC Tools
Plan	1. Select a Theme 2. Collect Data 3. Analyze causes/opportunities	Check sheet, graph, Histogram, scatter diagram, Pareto diagram, cause-and-effect diagram, Flowcharts
Do	4. Plan and implement solution / improvement	Flowcharts
Check/ Study	5. Evaluate effects	Check sheet, graph, Histogram, scatter diagram, Pareto diagram, cause-and-effect diagram, run chart/control chart
Act	6. Standardize 7. Reflect on process	Flowchart
Repetition	Process	Tools

Reference: Tumolo (isites.harvard.edu/fs/docs/.../Tumolo%20Toolbox.ppt)

CAUSE AND EFFECT DIAGRAM

Institute *for* **Healthcare Improvement**
Open School

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University/Organization Name: _____

Project Title: _____

Health System Sponsor Name: _____

Team Members: _____
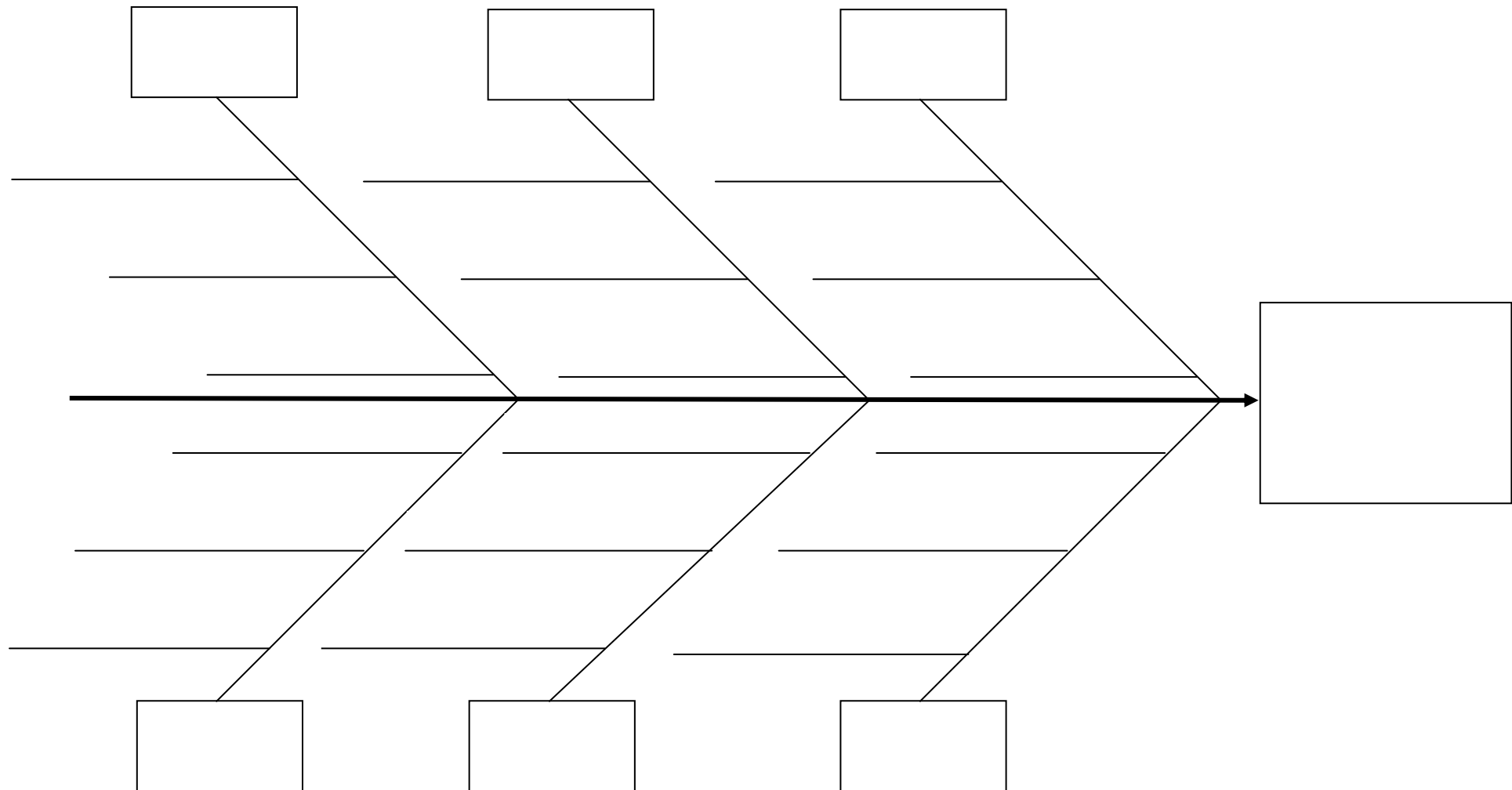
Program: _____ **Logic Model**

Situation:

Inputs	Outputs		Outcomes -- Impact		
	Activities	Service Delivery	Short Term	Long Term	Impact

Assumptions

External Factors

Evaluation Questions
Focus - Collect Data - Analyze and Interpret - Report

Indicators

Rev. 4/14

QI Bootcamp Exercises

Checklist and checksheet
- Open QI Macro
- Choose QI Macro>Fill-In-Blanks Template>Improvement Tools>Checklist
- Choose QI Macro>Fill-In-Blanks Template>Improvement Tools>Checksheet

Scatter Plot
- Open Scatter.xls
- What is the correlation between daily calorie intake and weight gain?

Bar Chart
- Open Healthcare.xls
- Click on XmR data tab
- What is monthly patient satisfaction data for past year?

Histogram
- Click on histogram tab
- What is radiology report turnaround time data?

Run Chart
- Click on XmR data tab
- Do a run chart on patient falls from Jan 04 to May 06

Control Chart
- Do a control chart on the same data

Flowcharting
- Open Lucidchart
- Make a flowchart of a pediatric patient coming into an office including steps:
    - filling out paper work
    - determining whether to go to sick child room or not
    - terminate by seeing doctor

Pareto chart
- Go back to Healthcare.xls
- Go to Pareto tab

Bootcamp Exercises

- Make pareto chart of medication errors at baseline

Fishbone diagram
- Go to QI Macro> Fill-In-Blanks Template>Flowchart and Fishbones>Ishikawa-Fishbone

Mindmapping
- Open Lucidchart
- Make a mindmap

Pareto Chart
- Go back to Healthcare.xls
- Go to Pareto tab
- Make pareto chart of medication errors at baseline, 6, and 18 months