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| Wolff Center of UPMC  |
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| The UPMC PI methodThe SITE-SPECIFIC CHECKLIST |

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| **1. Framing the Goal** | * Finalize the overall aim
* Define the scope of work/special consideration
* Identify key stakeholders/existing teams to be involved
* Define timeframe for completion of work
* Evaluate/include/understand existing system work
* Define metrics for success
* Define untouchables and landmines
* Anticipate barriers
* Identify local forums to introduce project (CEO, CNO, etc.) dept.and dept head meetings
* Define IT needs/applications/innovations
* Find a compelling patient story
* Define a local finance connection
* Gather existing evidence to support goal
* Consider research potential
* Consider publication potential
* Determine the leadership/staff roles
* Local executive sponsor(s)
* Local operational sponsor
* Local improvement team
* CQI2 improvement specialist (if applicable)
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| **2. Current State Assessment** | * Gather existing baseline data on metrics
* Conduct observations
* Interview key stakeholders
* Determine if there is an existing policy and other materials (patient education, procedures, framework)
* Determine if there is a policy (local or system-wide) or other existing teams/groups working in the same area anywhere in the system
* Initiate local improvement team
* Determine need for kick-off meeting, Kaizen, or other approach
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| **3. Design a Test of Change** | * Share the current state assessment and results
* Design a test of change based on current-state observation, in conjunction with the local improvement team
* Check for regulatory issues with proposed test of change
* Assure potential safety concerns are considered in test of change design
* Prep the local site in detail for pilot through one-on-one coaching
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| **4. Pilot/Conduct Rapid PDSA****Cycles** | * Conduct initial pilot at site
* Test for minimum amount of time to determine initial success/failure
* Complete rapid PDSA cycles to finalize change
* Engage local system improvement team frequently in the PDSA cycles via calls
* Keep system operational sponsor involved in PDSA cycles
* Update local forums as appropriate
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| **5. Evaluate Test of Change** | * Design final change package, after completion of PDSA cycles and outcomes are achieved
* Compile all metrics that will “tell a story” of change
* Review final package with local executive and operational sponsors for sign off and support
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|  **6. Spread** | * Define the critical components of local implementation and spread that are both negotiable and non-negotiable
* Prepare spread package (factors with spread)
* Define the program look – connect with corporate communications (if applicable). Consider…
* Training materials
* Print shop (if applicable)
* Downtime Forms (if applicable)
* Assure dates are on executive and operational sponsor calendars if there is a kickoff
* Identify any local barriers to spread or implementation concerns and execute
* Consider local “Extra” article
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| **7. Sustain** | * Determine metrics and frequency of publication locally
* Create periodic review to update project details
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**Additional follow-Up:**