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| Wolff Center of UPMC | | |
| |  | | --- | | The UPMC PI method  The SITE-SPECIFIC CHECKLIST | | | |
| **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) |  |
| **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 |  |
| **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 |  |
| **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 |  |
| **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 |  |
| **7. Sustain** | * Determine metrics and frequency of publication locally * Create periodic review to update project details |  |

**Additional follow-Up:**