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1 Choose improvement team

2 Detail the problem

3 Develop project aims

4 Choose an intervention

5 Plan implementation

6 Plan project monitoring

7 Plan end-of-project decision making

8 Planning complete?

9 Launch, monitor continually, and finish

No

Yes

How to do early planning of a small-scale QI project in surgery: a framework

The Health Foundation

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Domain		Must Do	Considered Helpful	Try NOT to
1	Choose improvement team	☐ Select team members and assign roles and responsibilities ☐ Ensure sufficient time availability	☐ Keep team size small and nimble (less can be more) ☐ Choose at least one person with improvement experience	☐ Include members with minimal engagement
2	Detail the problem	☐ Learn about the problem (where it lies, why it exists, its impact, etc.) ☐ Ensure the problem exists locally (is there data?) ☐ Understand the problem from people who know the relevant process	☐ Collect input from team and stakeholders when detailing the problem (and defining aims)	☐ Work on problems that require more resources than exist or are too complex to fix
3	Develop project aims	☐ Identify project aims using a SMART approach	☐ Describe patient benefits ☐ Obtain leadership support when addressing an organisational priority	☐ Create aims that require much more than 12 months to attain
4	Choose an intervention	☐ Be clear on why/how the chosen intervention will address the problem (including what evidence exists)	☐ Seek leadership commitment, depending on focus and scope of intervention	☐ Select highly complex interventions or interventions that are not supported by stakeholders and/or evidence
5	Plan implementation of intervention	☐ Plan implementation (who/how/where/when, including start/finish and interim meetings) ☐ Determine if frontline clinicians/staff are agreeable, have time/engagement, and are ready to implement ☐ Determine what/how data will be used	☐ Communicate the project to frontline staff and stakeholders before, during, and after ☐ Think of potential problems and contingencies	☐ Start without frontline input ☐ Assume frontline stakeholders have sufficient time, capacity, and are ready ☐ Assume silence means buy-in/engagement ☐ Spend much more than 3 months in planning phase

Domain		Must Do	Considered Helpful	Try NOT to
6	Plan project monitoring	□ Identify how/when 'in-project' assessments will occur to assess problems, deviations, and timelines	□ Consider techniques for making iterative modification (e.g. PDSA) □ Look for local barriers and facilitators (e.g. to fix; to support; potential learning)	□ Forgo data use
7	Plan end-of-project decision making	□ Plan who assesses project success and how □ Identify who collects project learnings □ Plan who decides next steps (e.g. continue effort, revise, or sunset)	□ Assess extent to which project has delivered on its aims	□ End the project without assessing success, documenting learning, and making end-of-project decisions
8	Planning complete?	□ Verify planning steps completed □ Verify implementation site(s) are ready □ Decide go/no go (if 'go', proceed to launch; if 'no go', return to issues identified in planning)	□ Balance 'good enough' versus 'perfect' □ Address fixable items from planning phases	□ Launch the project if more planning needed or proceed with project if too large/complex for resource level (people, time) and/or to implement
9	Launch, monitor, finish	□ Officially launch project □ Hold monitoring meetings where data is considered □ Assess project progress against protocol and timelines; make modifications as needed □ At completion, determine extent project aims achieved; collect learnings (on intervention and implementation); make decisions on continuing vs modifying vs sunsetting effort	□ Employ feasible iterative changes as needed □ Report findings and learning	□ Hold long and inactive meetings □ Allow project to continue without activity (e.g. do not languish) □ Allow effort to continue beyond projected end date unless new plan in place