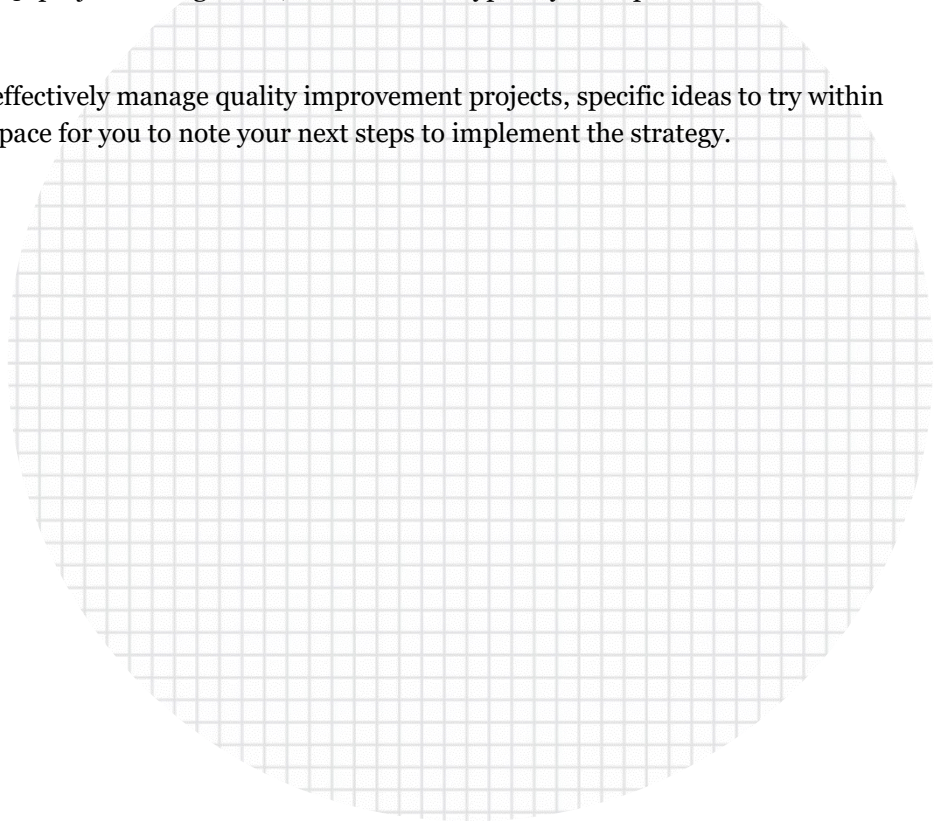




# Quality Improvement Project Management

Managing a quality improvement project is a critical skill for anyone interested in making care delivery — and systems of care — better in their health care organization. To successfully manage improvement, team leaders need specialized skills in QI project management, which has not typically been part of the improvement curriculum.

This tool describes strategies to effectively manage quality improvement projects, specific ideas to try within each strategy, and offers a workspace for you to note your next steps to implement the strategy.



| Strategy                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Ideas to Try                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | My Next Steps |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| <p><b>Frontload the work</b></p> <p>The start of an improvement project is often more work and more challenging because no progress has yet been made. However, it is important to not shortcut the planning (e.g., understand the problem or opportunity, gather baseline data and information, develop a measurement plan, organize the team). Dedicated and thoughtful planning time at the beginning of a project is more likely to lead to a successful project.</p> | <ul style="list-style-type: none"> <li>• Block time on your calendar to manage the upfront volume of work.</li> <li>• Set up meetings with the team and the improvement project sponsor with greater frequency in the first few weeks and less frequency over time.</li> <li>• Hold a project kickoff event to study the process and define the aim, measures, and change ideas: a full-day kaizen event, process mapping session, or team retreat.</li> <li>• Meet with your improvement project sponsor to ensure you agree on the project scope, aim, constraints, and how you'll work together.</li> <li>• Use a checklist of tasks to show the team progress before you start testing.</li> <li>• Create a set-up phase that is time-limited (e.g., 30 days) to ensure the team does not get stuck in the planning phase.</li> <li>• Set a date to pause the project if the set-up activities are not completed.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                     |               |
| <p><b>Build the team</b></p> <p>Getting the right people doing the right work in the right roles with the right team culture is key to accelerating your improvement work. The most effective improvement teams leverage various resources and organize the work to make the most of the human assets in the organization. Team leaders should focus on building their core team and then keep them engaged throughout the improvement project.</p>                       | <ul style="list-style-type: none"> <li>• Ensure that the <a href="#">right people are on the team</a>. If you can't recruit a key stakeholder (especially someone who might stop the improvement work), consider the following: <ul style="list-style-type: none"> <li>○ Change the project scope to be within the control of those who can be on the team.</li> <li>○ Identify “consultants” to provide regular guidance to the team.</li> <li>○ Use your improvement project sponsor to gather support for the team.</li> </ul> </li> <li>• Invite improvement team members to lead specific change ideas and <a href="#">Plan-Do-Study-Act (PDSA) testing cycles</a>, or measures and data collection and analysis.</li> <li>• Engage your improvement project sponsor to help push the team beyond the status quo, scope the project to the timeframe, and think through the improvement project aim, change ideas, tests, and measures.</li> <li>• To move more quickly, determine with the sponsor up front how and by whom decisions will be made.</li> <li>• Engage “historians” early to learn from past efforts and help the team make predictions about whether something will work based on their past learning. Confirm or change the predictions based on results of tests.</li> </ul> |               |

| Strategy                                                                                                                                                                                     | Ideas to Try                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | My Next Steps |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| <p><b>Predict, create, and keep the pace</b></p> <p>To sustain momentum, it's important to keep improvement projects time-limited and to establish a work plan with specific milestones.</p> | <ul style="list-style-type: none"> <li>• Set a start and end date for the improvement project.</li> <li>• Based on your end date, <a href="#">create a work plan</a> to help set the pace of improvement: <ul style="list-style-type: none"> <li>○ The work plan should include predicted milestones, the expected trajectory, and reflection points to drive the pace.</li> <li>○ Unlike traditional work plans, what you do in the future will evolve based on your testing and learning. You can, however, plan out your progress toward the aim (e.g., when you will be testing, when you will be implementing, when you will be 50% to goal).</li> <li>○ Build in points for reflection and celebration (learn from both successes and failures).</li> </ul> </li> <li>• Look for opportunities to pick up the pace. For example, if you are collecting data monthly, can you instead do it weekly or even daily? Meet more frequently for less time using huddles.</li> <li>• Frequent improvement team huddles and the use of visuals (e.g., <a href="#">run charts</a>, <a href="#">flowcharts</a>, <a href="#">visual management boards</a>) help the team keep pace and communicate about the project work.</li> <li>• Be intentional with time, always asking whether you are spending time in the right way in service of your goal: <ul style="list-style-type: none"> <li>○ Start meetings by reviewing the aim and predict how each PDSA cycle will contribute to the larger goal. If you think the contribution will be minimal, consider spending your time elsewhere.</li> <li>○ Make sure you're spending more time on improvement than measurement or paperwork.</li> </ul> </li> <li>• When you reach the end date of the improvement project, purposefully decide to continue (setting a new end date and/or creating a new <a href="#">project charter</a>) or to conclude (because you achieved your goal or because it's not the right time for the work). Take time to appreciate everyone's contributions and celebrate what was learned.</li> <li>• If you conclude it's not the right time for the work, document what you learned and share it with teams that might continue the work at another time.</li> </ul> |               |

| Strategy                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Ideas to Try                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | My Next Steps |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| <p><b>Make it easy, and focus on learning, not perfection</b></p> <p>IHI likes to say everyone has two jobs — to do your work and to improve your work — yet the reality is that improvement work is often done in addition to day-to-day work.</p> <p>The tips and tools shared here aspire to make improvement work easy, efficient, meaningful, and fun (especially meetings!) for the team.</p> <p>Additionally, at the beginning of an improvement project, focus on learning quickly so that you can make progress faster. This includes keeping your aim, measures, and changes flexible; trying to scale-down tests and data collection; and ensuring that the project work is designed to help the team understand what it takes to bring about improvement that is not focused on research or accountability.</p> | <ul style="list-style-type: none"> <li>• Keep improvement team meetings short by using a standard agenda that runs through key points.</li> <li>• Use existing meetings, structures, and one-to-one check-ins to do improvement work, including data collection. Look for opportunities to swap existing meetings or work for improvement team time and work.</li> <li>• Reflect on how to “make it easy and successful” for the team, discussing successful and unsuccessful past projects and asking the team to anticipate barriers using a force field analysis.</li> <li>• Make improvement team meetings fun and meaningful, including incorporating stories of impact, music, and energizers. Try starting meetings by asking each person to share one good thing.</li> <li>• Develop a theory of improvement (e.g., create a <a href="#">driver diagram</a>). An incorrect theory gives the team more learning than having no theory at all. Refer back to your theory regularly; as you learn, the theory should change, as should your work and effort to align with the modified theory.</li> <li>• Predict the percentage each driver contributes to your theory (e.g., driver 1 will have a 20% impact, driver 2 a 50% impact, etc.); revise these predictions as you test and learn to track the contribution of various efforts toward achieving your improvement aim.</li> <li>• Remain curious and willing to be surprised and to change your efforts as you learn.</li> <li>• Do everything “in pencil” to encourage change based on learning throughout the project: use flipcharts, sticky notes, and whiteboards instead of lamination or slides. People are more likely to be open to ideas and give feedback when the “product” doesn’t feel final.</li> <li>• “Step-down” to learn quickly. Look for opportunities to accelerate learning with small tests (e.g., testing with one person this afternoon instead of 20 people next week).</li> <li>• Collect data that’s “good enough” to drive improvement, not “exquisitely precise” or “official” data that costs a lot and delays your need to test and act. Use sampling to avoid survey fatigue and accelerate learning (e.g., send 10 different staff members a three-question survey every week rather than all 40 staff members a survey every month).</li> </ul> |               |

| Strategy                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Ideas to Try                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | My Next Steps |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| <p><b>Start with the end in mind</b></p> <p>So often teams make great progress and achieve great results during the improvement project, but unfortunately can discover months later that their good work hasn't "stuck." Even when you are just beginning an improvement project, it is important to start with the end in mind — plan for scale-up of improvements early on and make sure projects are set up to sustain those improvements over time.</p> | <ul style="list-style-type: none"> <li>• Ensure those staff who will own the work long-term are engaged in the improvement efforts from the beginning.</li> <li>• Use visuals (e.g., run charts, storyboards) to share progress and information in common, visible areas.</li> <li>• Ask a diverse set of individuals to help with or shadow PDSAs.</li> <li>• Find appropriate venues to begin telling compelling stories about the work.</li> <li>• Invite other staff who will implement and scale-up the improvements in the future to shadow the work. Share stories of "hard-won" lessons that you don't want them to have to learn themselves, in addition to successes.</li> <li>• If you achieved your improvement aim by the defined end date, set up a 30-, 60-, and 90-day plan to close out the project work. Decide which measures you will continue to track over time at some frequency to monitor that the gains made during the improvement effort are sustained.</li> </ul> |               |

### Additional IHI Resources

- [How to Improve](#): Forming the Team; Setting Aims; Establishing Measures; Selecting, Testing, and Implementing Changes
- [Quality Improvement Essentials Toolkit](#)
- Scoville R, Little K, Rakover J, Luther K, Mate K. [Sustaining Improvement](#). IHI White Paper. Cambridge, MA: Institute for Healthcare Improvement; 2016.
- [WIHI: Five Practical Strategies for Managing Successful Improvement Projects](#) (June 2016 recorded audio program)