Guide to Planning Your Next Quality Improvement Project

This guide pieces together advice and best practices from IHI Open School Chapter Leaders. The following action items should help Chapters plan successful quality improvement (QI) projects.

Getting Started

You’ll know if your Chapter is ready to get involved with QI project work if:

- Your Chapter is established, with a strong leadership team and, if possible, faculty support, mission statement, and clear goals for the year.
- Chapter members have a basic understanding of both QI and patient safety. Many Chapters require members to complete Open School courses, especially those participating in project work. Consider how you might set-up time for members to complete the Basic Certificate in Quality & Safety together.
- Chapter members have at least three months to one year to commit to this project.

Initiating Projects and Establishing Connections

Before you can start your project, you will need to connect with an organization that is willing to host your team and project.

- Network! Connect with Faculty Advisors and leaders at your institution to form potential partnerships.
- Be well-organized and professional in your interactions with outside organizations.
- Consider connecting with local hospitals and medical centers, institution-based health resources, and community-based organizations.

Once you’ve established a connection with the organization you plan to partner with, meet with your contact to explicitly define a timeline and expectations. This will help to ensure a positive working relationship between your project team and your host organization.

Here are a few guiding questions to ask:

- How long will the project run for?
- Is there a deliverable or report the institution is expecting from your team?
- What kind of access does your team need to do project work? (e.g. computer log-on, institution-based training, badge access)
- When and where is your team allowed to be on-site?

Forming Teams

- Be realistic! In smaller Chapters, an entire Chapter may be able to work on one project while in larger Chapters, only a certain number of people may be able to participate.
- Set clear norms and responsibilities — for your Chapter, and project participants. Consider including the following roles:
  - A team lead (or two) that will manage participating teams or individuals, and keep them accountable to their project commitments
  - An individual to streamline communication between your Chapter and contact at the institution
  - A point person who can oversee necessary grant applications, budgets, reimbursements
Someone who will keep a record of any meeting minutes or conversations, and oversee scheduling needs.

If needed, you can form sub teams for these tasks too.

- Establish a clear line of communication between team members and your host organization.

**Project Work**

Whether joining a project that is already underway or starting one from scratch, be sure to:

1. Research and define the problem you are trying to solve
2. Create an aim statement
3. Identify and define measures
4. Brainstorm changes that may result in an improvement
5. Plan your first small-scale PDSA cycles!
6. Following PDSA cycle, revisit ideas, see what worked, and plan the next one

Things to keep in mind as you start your project work:

- Be considerate as an external team coming into an organization to complete a QI project
- Be open to the project transforming over time
- Remember that change can be difficult for a lot of organizations

If your Chapter or members are looking for additional support and coaching during project work, consider enrolling in one of the Open School's two project-based learning courses: Leadership and Organizing for Change or the Quality Improvement Practicum.

**Sustainability**

- Know your timeline. How long will your Chapter test and implement changes?
- Will any of your changes reach policy? If so, what are your steps to solidify that?
- Ensure your team's improvements are both sustainable and realistic for the organization. What tools are you leaving with the institution to sustain improvement?
- Ensure your QI project team has a clear system in place for an organized transition, both between project leaders and the organization. Plan for who will continue the work when current leadership graduates or moves on, and set-up any needed introductions with key stakeholders.

**Learn more:**

- Leadership and Organizing for Change course
- IHI Open School QI Practicum
- IHI Open School blog, which features Chapter projects