

# Improvement Planning Worksheet

## Instructions

After the Sharing and Feedback Session, please return this worksheet to an SHB Project Team member. We will photocopy the worksheet and return your original.

The objectives of the Improvement Team meeting are to:

1. Refine your aim statement
2. Identify measures relevant to your aim
3. Clarify who is part of your improvement team
4. Generate ideas for change
5. Prioritize and schedule tests of change
6. Plan your first PDSA cycle in detail

Step-by-step instructions and room to record your work are provided below.

## 1. Aim Statement

Review your system inventory and your aim statement. Discuss your aim as a team. If appropriate, modify your aim and specific target goals.

- Is your aim aligned with other organizational goals or initiatives?
- Do all members of your team agree?
- Will it be clear to others when the aim is achieved?

Please list your revised aim statement.

**Name of practice/clinic/nursery:**

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**Intends to:**

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**By (date):** \_\_\_\_\_ **for (population):**

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**Because:**

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## Our goals include:

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## 2. Measures

Given your aim and goals, which measures will your team use to track progress? Use the goals listed in the Improvement Project Charter to guide your selections.

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## 3. Team

Please list the names and titles of the members of your team who will be carrying out the plan described in this worksheet. Please use an asterisk to indicate those who are attending the Learning Session.

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### 4. Ideas for Changes

When you are satisfied with your aim and are prepared to share it with others, please begin brainstorming ideas for change. Use the draft toolkit and any material gathered during the breakout sessions today.

- Given your aim and what you have learned today, what changes do you predict may help you reach your goals? In the space below, list changes that you can test in the next week. (You don't have to commit right now to testing these changes; you'll select one later. Just list changes you could try this next week if that's what your team decides to do.)

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- In the space below, list changes that you can test in the next 90 days.

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### 5. Complete the Testing Schedule Form

Using the list of changes you identified in Step 4, determine the tests you plan to conduct during the Action Period. On the Testing Schedule Form, list the tests you will run, the responsible team member, and the predicted start and completion date for each test. Below is an example of how the form can be used.

Cycle No.	Change Tested	Person Responsible	August	Sept	Oct	Nov	Dec	Jan
1 (example)	Incorporate reminder on risk assessment worksheets in chart - test with Dr. M's patients	Nurse manager Dr. M	X →					
2	Expand test to Dr. H and R's patients	Dr. H Dr. R		X →				

### 6. Complete a Model for Improvement PDSA Worksheet

Use the cycle worksheet to plan in detail the steps you will take to design and carry out the first test listed on the Testing Schedule Form. Use the guiding questions on the worksheet to help guide your work. You should plan to complete at least one detailed "plan" section before this meeting is over.

Blank electronic copies of the Testing Schedule Form and the PDSA Worksheet will be available after the Learning Session to help organize and document your improvement efforts in the action period.

