**QI Project Evaluation**

**Site:**

**Date:**

**Evaluator:**

|  |  |  |  |
| --- | --- | --- | --- |
| Project Phase | Element | Evaluation Questions | Comments for  Follow-Up |
| Facility Information | Site Statistics | * Accuracy of Data – Match between # of patients, # of samples, % coverage, etc. |  |
| Overarching Project | Stakeholder Analysis | * Capture all stakeholders * Includes actions for continued stakeholder engagement |  |
|  | Team Formation | * Team Members identified / selected * Team Members aware of project |  |
|  | Project Summary Slide | * Overarching Goal, Aim Statement, and Intervention all related to same problem statement * Problem Statement - 15 words or less, Adequately captures the actual problem addressed by the project, No solutions included * Aim Statement - Includes WHAT (Target improvement) BY WHEN (Timeline) * Intervention described / titled clearly and succinctly (can listeners tell what they did??) |  |
|  | Coherence | * Does the overall presentation tell a coherent, cohesive, “linked” story? * Can a thread be seen throughout the presentation where all tools are linked to each other, all utilized to reach IMPROVEMENT? |  |
| DEFINE | Elevator Speech | * Includes the big picture / goal – “This project is about” * Appeals to the stakeholder audience by answering the why & stating the importance – “As a result of these efforts” and It’s important” * Includes metrics * Includes an “ask” |  |
|  | Process Mapping | * Sufficient detail showing understanding of current process * Only a single step, completed by a single person, included in each process step * Process Table AND Process Map (Visual) * Clearly identified OFI (Opportunities for Improvement) * All OFIs included in the Action Plan (whether related to the main aim or a “Just Do It”) |  |
|  | VOC | * Data collection / method / Questions asked related to problem statement * Correct customer identified * Summarize results clearly |  |
| MEASURE | Data Source / Sample Size | * Data Source Identified * Sample Size identified |  |
|  | Baseline Data | * At least 6 points * Raw data (numbers) included – Data Box * Percentage calculated correctly * Plotted on a Run Chart * Integrated into Aim Statement |  |
| ANALYZE | Root Cause/s | * Problem Statement at head of the Fish (if using the Fishbone) * Complete list for each “bone” of the fish * Includes all data gathered from Process Map & VOC * Clearly identifies cause/s of the identified problem * Utilizes at least one or more QI tools (Fishbone, 5 Whys, etc.) |  |
| IMPROVE | 5S | * Photos - Before & After, Included * 5S Audit completed – Before & After |  |
|  | Impact / Effort Grid | * Are the “Just Do Its” correctly identified? * Is there a clearly defined project? |  |
|  | Tests of Change / Interventions | * Tests related to causes identified in the Analyze phase (Rationale for selecting each change given) * Each Test of Change clearly identified / described * Remeasurement after each PDSA * Remeasurement displayed on the Run Chart & Annotated * How many tests of change? * Any progress on AIM? * Actions for next test (PDSA) identified after each test? |  |
|  | Final Intervention | * Quality of Intervention – Innovative, sustainable, makes sense, demonstrates connection to entire project (i.e., related to identified causes and addresses problem statement) * Improvement – Did it occur? Was AIM reached? * Is the evidence of improvement seen in the run chart? Is the run chart annotated to indicate the various tests of change? * Standardized – Presented in a standardized format, a SOP, a job aid, a video - for reproducibility & spread |  |
| CONTROL | Control Plan | * Transition to Process Owner * Review Criteria for Project Metrics after the project closes – Who, What, When, Where, How often? * Plan for course correction if control is not maintained |  |
|  | Final Report | * Interventions implemented * Lessons learned * Communication to stakeholders |  |
|  | Spread / Scale-Up, if indicated | * Plans for Scale-Up / Spread * Stakeholder Engagement * Coaching Others |  |