

Frontload the work: Project set-up checklist

Aim

- Understand performance of current system
- Draft aim
- Create numeric theory for reaching aim

Measures

- Develop initial measures
- Test measurement strategy
- Collect baseline
- Finalize measurement strategy
- Create data collection plan
- Begin collecting data
- Set-up run charts to make plotting data easy

Changes

- Understand how the current system works (e.g., observation, process flow)
- Conduct internal/external information gathering (e.g., interview key stakeholders)
- Develop way to show system (e.g., driver diagram, block diagram)
- Identify high-leverage PDSA ramps
- Develop a set of change ideas to begin testing

Testing

- Develop schedule for testing
- Run initial PDSAs
- Identify next PDSAs

Establish Team

- Identify team leadership
- Identify other team members
- Recruit team members
- Develop working agreement with team lead
- Create norms for team

Other

- Schedule retreat
- Set-up team meetings
- Set-up meetings with executive sponsor
- Develop system to track and record information
- Communicate about efforts with key stakeholders

