Improvement Project Roadmap

Improvement teams often need a roadmap for applying the science of improvement to the project management tasks associated with their improvement efforts. This tool was developed by IHI Improvement Advisor, Richard Scoville, in collaboration with the North Shore–Long Island Jewish Health System, as part of their advanced illness collaborative. It has since been adapted to guide team participation in several other health care improvement collaboratives.

1. Set an Aim: What are you trying to accomplish?

Tasks	Driver	Status 1: planned 2: in progress 3: complete	Next Steps
Identify your patient/target population	Team Lead		
Decide which delivery sites and providers will eventually be involved	Team Lead		
Start getting prevalent ideas and agreement on best practices, protocols and guidelines, based on evidence as much as possible	Team Lead		
Decide what should be measured and how, including outcomes and processes	Team Lead		
Describe an ideal system: How will care be delivered? Identify major gaps between this and the current system.	Team Lead		
Develop a preliminary picture about how all the elements work together to get the desired result, and note the most important elements (could be a driver diagram or other visual tool)	Team Lead		
Write a formal aim statement: "How much, by when, for whom?"	Team Lead		

2. Develop an Improvement Strategy

Tasks	Driver	Status 1: planned 2: in progress 3: complete	Next Steps
Assemble your team, assign roles, and plan for meetings	Sponsor/Team Lead		
Make a plan for: • Real-time data collection • Placing the data on run charts • Review by the team • Share information about the improvement work with others	Team Lead		
Develop a tactical plan: • Can you tackle an "easy" part of the system first? • How can you eventually spread to all sites and providers? • Consider the key players and decision makers for promoting or blocking this work	Team Lead		

3. Develop and Pilot a Reliable Standard Process of Care

Tasks	Driver	Status 1: planned 2: in progress 3: complete	Next Steps
Get to know the current processes in detail: Use observation, process maps, value stream maps, run charts, surveys, Pareto analysis, etc.	Team Lead		
Sketch an initial process design	Team Lead/ Improvement Advisor		
Select which changes and improved design elements to test using PDSA cycles	Team Lead		
Test changes and refine the design by starting with 1 patient or event (testing and refining changes is an iterative, continuous process using PDSA cycles)	Team Lead		
Regularly analyze how the process and the changes are working and test additional changes as needed based on your analysis	Team Lead/ Improvement Advisor		
Track and document changes, tests, and results over time	Team Lead/ Improvement Advisor		
Coach and support front-line staff on problem identification, PDSA testing	Team Lead		
Provide regular feedback to process participants and the executive sponsor at least weekly	Team Lead		
When you are confident that the change is producing improvement, begin planning for implementation (making the change permanent)	Team Lead		

4. Implement the Standard Care Process, Monitor Performance

Tasks	Driver	Status 1: planned 2: in progress 3: complete	Next Steps
Ensure that new, successful standard processes are truly adopted in the local system, units, or practice sites	Team Lead		
Develop a regular system for continuous measurement and feedback on key results	Team Lead		
Consider how to spread or scale up successful processes to all sites, providers, patients; identify required resources and support processes	Sponsor		
Embed new standard processes in the local system: training, job descriptions, support processes	Sponsor with Local Manager		
Loop back to step 3 (spread and scale up successful processes) for continuous improvement	Sponsor		

5. Spread the New Standard Throughout the System

Tasks	Driver	Status 1: planned 2: in progress 3: complete	Next Steps
Develop a communication and dissemination plan	Sponsor		
"Package" content for easy implementation by new teams, sites	Quality Department		
Spread to additional sites, monitor adoption and performance	Quality Department		