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| **DEPARTMENT OF HEALTH SERVICES**  Division of Public Health  F-00615A (05/2018) | **STATE OF WISCONSIN** |
| **CHANGE PROJECT SUMMARY** | |
| ADRCs can use this model to guide their narrative description of their change project. | |

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| [**Instructions**](#Instructions) can be found at the end of this form. |

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| Name of Organization: |

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| Office or Site Location: |

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| Executive Sponsor: |

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| Change Leader: |

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| Change Team Members: |

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| **Change Project:**  Provide a summary of the change project idea and goal. This summary should include:   * The change project title * The change project Aims (big and small) * Start and completion dates * Customers you are trying to help * Service you are trying to improve * Data collection method and who is responsible for the data collection * Method to keep team members, including the Executive Sponsor, informed about the change project * Anticipated programmatic and/or financial impact of this change project |

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| **Baseline Data:**  Provide a summary of the baseline data. This summary should include how the data was collected including the tool used to collect the data. |

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| **Plan, Do, Study, Act (PDSA) Cycle:**  Provide a summary of each PDSA cycle. Each change cycle summary should include:   * Cycle Begin Date and End Date * Plan – the idea/change being tested * Do – steps specifically made to test this idea/change; person responsible for overseeing the change, and baseline data results. * Study – results and comparison to the baseline data * Act – next steps: Adopt? Adapt? Abandon? |

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| **Project Outcomes** (only complete if the team has adopted a change and the change project is finished):  Provide a summary of project outcomes. This summary should include:   * Project end date (when you stopped making changes) * Lessons learned (e.g., describe what the team thought the outcome would be and what was the actual experience) * Programmatic and/or financial impact of this change project (e.g., increased revenue, reduced costs, increased staff retention) |

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| **Sustainability Plan** (complete only if the team has adopted a change):  Provide a summary of the sustainability plan. This summary should include:   * Changes to sustain * Method and responsible person to make sure the change project is sustained * Target goal * System in place to measure and monitor that the process continues to meet the target goal |

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| **Additional Notes:** |

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**INSTRUCTIONS**

The purpose of the Change Project Summary Template is to provide a template to document the steps in your change project and ensure that critical elements are incorporated. The narrative documentation should describe your project with sufficient detail to provide readers with an understanding of the goals and outcomes of your project.

**Change Project Summary Template**

1. **Name of Organization:**

Full name of the Aging and Disability Resource Center (ADRC).

1. **Office or Site Location:**

Name of the ADRC and / or the site location.

1. **Executive Sponsor:**

Identify by name the Executive Sponsor. This is the person who will support the efforts of the Change Leader by “clearing the way” for a change project to occur and supporting the Change Leader and the team.

1. **Change Leader:**

Identify by name the Change Leader. This person is appointed by the executive sponsor. Effective change leaders are enthusiastic, respected by others on the change team, understand process improvement, are a leader and motivator of other team members.

1. **Change Team Members:**

List the names of all change team members. Every person who will take an active role in the change project should be part of the list. Successful teams usually have seven or fewer members.

1. **Change Project Title:**

Name of the change project that reflects the focus of your project. Be creative!

Involve your change team members in naming the project.

1. **What Aims will the change project address?**

“Big Aim” that your team plans to focus on for their change project.

The “Big Aim” should be chosen from one of the five ADRC Aims:

* Reduce Customer Wait Time
* Increase the Utility of Referrals
* Increase New ADRC Customers
* Increase Customers Ability to be Healthy at Home
* Increase Customer Satisfaction

The “Small Aim” that your change project will focus on. You may not know your “Small Aim” at the beginning of the project. The “Small Aim” is chosen after you do your walk-through and process mapping/flow charting.

To know if your “Small Aim” statement is written correctly, consider the following:

* Does your small aim statement follow this format: (process/system/problem area) will increase/decrease from (baseline data) to (goal) by (end date)?
* Is it related to one of the five “Big Aims”?
* Is it measurable? Measurable means that you can count or observe it.
* Does it define a target population to be served?
* Does it identify the baseline measure and the target goal or expected outcome?
* Does the aim statement identify a start date and end date to achieve your expected outcome?
* Does it identify who will be making the change and who will be affected by the change?

The following are examples of “Small Aim” statements.

Small Aim: *ADRC Information & Assistance (I&A) staff will reduce customer wait time for all callers in need a home visit from initial call to home visit from 21 to 7 days from Sept 1- Nov. 30th.*

*Check:*

* Is it related to one of the five “Big Aims”? Yes, decrease customer wait time.
* Is it measurable? Yes. You can count the number of days between the initial call and the home visit.
* Does it define a target population to be served? Yes, all ADRC customers who require a home visit.
* Does it identify the baseline measure and the goal or expected outcome? Yes, the baseline is 21 days, and the goal is to decrease this to seven days.
* Does the statement identify a time line? Yes, the change project will measure their results of changes from Sept. 1- Nov 30th.
* Does it identify who will be making the change and who is affected by the change? Yes, the I&A staff will make the change, and all customers who require a home visit will be affected.

Small Aim: *ADRC staff will attempt to increase the number of Hispanic customers from an average of two each month to five from Jan 1- Mar. 31st.*

*Check:*

* Is it related to one of the five “Big Aims”? Yes, Increase ADRC customers.
* Is it measurable? Yes, staff can tally the number of Hispanic customers who have contact with the ADRC.
* Does it define a target population to be served? Yes, the aim clearly defines the Hispanic community as the target population.
* Does it identify the baseline measure and the goal or expected outcome? Yes, the baseline is two with a goal of five each month.
* Does the statement identify a time line? Yes, the change project will measure their results of changes from Jan. 1- Mar. 30th.
* Does it identify who will be making the change and who will be affected by the change? Yes, all ADRC staff will be working toward increasing new Hispanic customers.

1. **Start Date:**

Indicate the start date of the change project and the anticipated completion date. The ability to collect sufficient data (including baseline data) will often affect the start and end dates for a change project. However, projects should be completed in the shortest amount of time possible to maintain change team momentum. It is important that team members know when the project starts but also the anticipated end date. This helps team members know that the change project is time limited.

1. **Describe the customers you are trying to help:**

Indicate the customers on whom your project is focused. You may be attempting to improve a process for all ADRC customers, or you may want to focus on a particular target or subset of ADRC customers.

*Examples:*

1. The ADRC is attempting to increase information and assistance for ADRC customers who are Hispanic.
2. ADRC customers who are deaf or hard of hearing will be the focus of our change project.
3. Increase walk-in customers at the Goodland County ADRC.
4. All persons served by the ADRC.
5. **What service are you trying to improve?**

*Examples:*

1. Decreasing the time between first call and scheduled home visit.
2. Increasing new ADRC walk-in customers.
3. **Collect Data:**

Provide a brief description of the data that will be collected, how it will be collected (tools or data sheets) and who collect the data.

*Example:*

Sarah will collect from all staff the first name and last initial of customers who contacted the ADRC and were in need a home visit. Staff will note, next to the name, the number of days between the first contact and the scheduled home visit. The average number of days will be shared at each Change Team Meeting which is held every other week.

1. **Team Communication Strategy:**

Define who will be responsible for keeping team members informed of the status of the project; and when, how and where this communication will occur.

*Example:*

The change team will meet every other week to review the data collected by Sara *(the data collector).* Team members will decide to adapt, adopt, or abandon the change after reviewing the data. Michael *(the change leader)* will share the results the Executive Sponsor, team members and other interested staff in a brief report within three days of each change team meeting.

1. **Programmatic and/or Financial Impact:**

The Executive Sponsor and the Change Leader should be able to anticipate or forecast an expected programmatic and / or financial impact as a result of the change project. Examples might include:

1. Increase in staff availability for customers resulting in more availability for home visits;
2. Better coordination of travel resulting in more efficient use of staff time and lower travel costs;
3. Increase in a particular target group of customers.

**Plan, Do, Study, Act (PDSA) Cycle**

The Plan, Do, Study, Act (PDSA) worksheet is a tool to document and track the progress of the change project.

Baseline Data: Provide a summary of the baseline data. This summary should include how the data was collected and provided, including the tool(s) used to collect and present the data.

PDSA Cycle:

Provide a summary of each PDSA Cycle. Each change cycle summary should include:

* Cycle Begin Date and End Date
* Plan – the idea/change being tested
* Do – steps specifically made to test this idea/change; person responsible for overseeing the change; and baseline data results.
* Study – results and comparison to the baseline data
* Act – next steps: Adopt? Adapt? Abandon?

**Evaluation and Sustainability Plan**

**Project Outcomes**

Complete only if the team has adopted a change and the change project is finished.

**End Date:** Determine the date the change team decided they had done all that they could to meet or exceed their project goal.

**Learn:** Describe what was learned by the team and if the outcome(s) differed from anticipated outcomes. This is a place to record any lessons learned from the project.

**Programmatic and/or Fiscal Impact:** Describe what the programmatic or financial impact was of this change project. Ask these questions: did it increase revenue, reduce costs, increase staff retention, increase staff morale, reduce travel, or allow more flexibility in scheduling? The most important question is, “How did the change benefit customers?” Having actual data, statistics, or cost impact data will be beneficial in showcasing the results and impact of your efforts.

**Sustainability Plan**

Complete only if the team has adopted a change.

**What changes do you want to sustain?:** Describe what changes the change team members wish to sustain.

*Example:* Based on an increase of 5 (35%<) new customers the change team has determined grocery bag flyers seem to generate additional contacts with the ADRCs. We will continue to use the flyers in grocery store bags on Wednesdays and Fridays on the second and fourth week of each month.

**Sustainability Leader:** Name the person who is charged with ensuring that the change is sustained.

*Example:* The sustainability leader is Monica.

**Target/Goal:** Identify the target or goal.

The change team should decide what is an acceptable threshold and at what point the change leader and/ or team members should meet to review the new process/change project if the target/goal is not being met. In addition, the change team should decide when a review of the project should occur (when to collect data again to analyze whether the new process continues to be an improvement).

*Example:* Team members have determined that we will expect at least 5 five new ADRC customers each week following the use of grocery store flyers each time they are used.

**Measure and Monitor:** Explain the system that is in place to measure and monitor that the process adopted continues to meet the goal.

*Example:* The sustainability leader will ask staff to tally for a period of one week the number of new ADRC customers who heard about the ADRC from a grocery store flyer. The tally will be done the first week of July and again the first week of December. If new customers below 3, or 15%, the Change Leader will be informed, and s/he will call for a change team meeting to review the details of the change project. The team will act to affirm the integrity of the change project by assuring that all steps related to adopted changes are being followed. Adjustments may be made by the team to address decreases in new customers, and, subsequently, a new measure will need to be developed to assure sustainability.

**Additional Notes**

This section can be used to document additional activities, information, or learning related to the change project. the project.