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| **DEPARTMENT OF HEALTH SERVICES**  Division of Public Health  F-00615 (12/2018) |  | **STATE OF WISCONSIN** |

**CHANGE PROJECT REPORT**

Completion of this form is voluntary; however, use of the form ensures all required elements are incorporated.

**[See Instruction at end of form](#Instructions)**.

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| **Name of Organization:** |  |
| Office or Site Location of Change Project: |  |
| 1. **CHANGE PROJECT** **TITLE** |  |
| 2. What **AIM** will the Change Project address? | “**BIG A**” |
| “**small a**” small aim statement: (process/system/problem area) will increase/decrease from (baseline data) to (goal) by (end date): |
| 3. **START DATE** and anticipated completion date |  |
| 4. Describe the **CUSTOMERS** you are trying to help. |  |
| 5. What **SERVICE** are you trying to improve? |  |
| 6. **EXECUTIVE SPONSOR** |  |
| 7. **CHANGE LEADER** |  |
| 8. **CHANGE** **TEAM MEMBERS** |  |
| 9. How will you **COLLECT DATA** to measure the impact of the change and who will be responsible for data collection? |  |
| 10. **TEAM COMMUNICATION STRATEGY** How will the team members, including the Executive Sponsor, stay informed about the change project? |  |
| 11. What is the anticipated **PROGRAMATIC and/or** **FINANCIAL IMPACT** of this change project (business case)? |  |

**PDSA CYCLES**

| **Rapid**  **Cycle #** | **Cycle Begin Date** | **Cycle**  **End Date** | **Plan**  *What is the idea/change to be tested?* | **Do**  *What steps are you specifically making to test this idea/change? Who is responsible? Data: what is the result?* | | **Study**  *What were the results?*  *How do they compare with your baseline measure?* | ***Act***  *What is your next step?*  *Adopt? Adapt? Abandon?* |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Steps Taken | Data Collected |
| **Base-line**  **Data** |  |  | N/A | N/A | Note baseline data | N/A | N/A |
| **1** |  |  |  |  |  |  |  |
| **2** |  |  |  |  |  |  |  |
| **3** |  |  |  |  |  |  |  |
| **4** |  |  |  |  |  |  |  |
| **5** |  |  |  |  |  |  |  |

**EVALUATION AND SUSTAINABILITY PLAN**

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| **Project Outcomes** (only complete if the team has adopted a change and the Change Project is finished) | |
| 1. What was the ACTUAL project  **END DATE** (when you stopped making changes)? |  |
| 2. What did you **LEARN** (e.g., describe what the team thought the outcome would be and what was the actual experience)? |  |
| 3. What was the **PROGRAMATIC and/or FINANCIAL IMPACT** of this change project (e.g. increased revenue, reduced costs, increased staff retention)? |  |
|  | |
| **Sustainability Plan** (complete only if the team has adopted a change) | |
| 1. What **CHANGES** do you want to **SUSTAIN**? |  |
| 2. Who is charged with taking the role as the **SUSTAINABILITY LEADER,** to make sure the change project is sustained? |  |
| 3. What is the **TARGET GOAL**? |  |
| 4. What system is 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 Report Form is to provide a tool to document the steps in your change project and ensure that critical elements are incorporated. The documentation should describe your project with sufficient detail to provide readers with an understanding of the goals and outcomes of your project.

The staff person charged with documenting actions of the change team should fill in each field as information about the project becomes available. The form is an excellent way to share ongoing progress of a change project with team members and others who may be interested.

**Change Project Report**

(Page 1 of the Change Project Report form)

**Name of Organization:**

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

**Office or Site Location of Change Project:**

Enter the name of the ADRC and / or the site location.

1. **Change Project Title:**

Choose a name for your change project that reflects the focus of your project. Be creative!

Involve your change team members in naming the project.

1. **What Aim will the Change Project address?**

Enter one “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

Enter one specific “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 and 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. **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. **Collect Data:**

Enter a brief description of the data that will be collected, how it will be collected (tools or data sheets) and who will 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 are 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) Cycles**

(Page 2 of the Change Project Report form)

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

The first line in the form is for notation of the baseline. No additional information is needed.

1. Cycle Begin Date: The date you begin a change.
2. Cycle End Date: The date the change ended.

**Plan:** *What is the idea/change will be tested?*

After your team completes the nominal group technique to identify the change they would like to try first, indicate that first change on the chart. Keep in mind that your team should be testing one change at a time. The change should have a direct impact on the “Small Aim” and be able to be measured against the baseline measure.

**Do:** *What steps are you specifically making to test this idea/change? Who is responsible? What are the baseline data results?*

This section has three components required:

1. Steps Taken: What steps are you specifically taking to test this idea/change? Briefly describe the steps that will be taken to test the change described in the Plan column.
2. Steps Taken: Who is responsible? Identify who will be responsible for implementing the steps.
3. Data Collected: The results should be represented by a number or value.

*Example:*

Step Taken: Deliver ADRC flyers for placement in shopping bags at the local grocery stores by May 30th. The flyer will be placed in all bags on the third Wednesday each month.

Step Taken: Monica and Nicole will deliver the flyers and all staff will be responsible for collecting data from customers.

*Data Collected:*

For the first two weeks of June, all ADRC specialists will ask all customers that walk-in or have a phone contact with the ADRC where they heard about ADRC.

All ADRC specialists will indicate on a simple tally sheet the number of customers who reported they saw the flyer about ADRC services.

The tally or data collection tool should be developed by either the change leader or data keeper. The simpler the tool, the better, as it is more likely to be used by staff and it is easier to measure. It is also important that each person collecting is clear about what data to collect.

It is recommended that you try your change only for the timeframe necessary to collect sufficient data for comparison to the baseline data. Depending on your change project, data collection may take as little as a few weeks, but some projects may require data collection for a few months. Try to avoid working on change projects that require the collection of more than three months of data.

**Study:** *What were the results? How do they compare with your baseline measure?*

Look at your baseline data and compare the results (data collected during the change cycle). Enter the number, and if needed, enter the amount of change by indicating a numerical value or percentage.

*Example:*

Comparing the baseline data to the data collected during the change cycle indicates store flyers resulted in six new customers contacting the ADRC. This is an increase of four or 25%.

**Act:** *What is your next step? Adopt, Adapt, Abandon?*

Based upon the results, the change team should decide to adopt the change if it resulted in an improvement. Adapt a change to see if a slight modification works even better or abandon the change, if the change did not result in an improvement.

In some change projects the results may be very clear. Some teams have found that the outcomes had varying effects on the “Small Aim” including positive, negative, or no change at all. In some cases, the team may feel there is insufficient data and may choose to continue the change before making any decision. If insufficient data has been collected, the team must decide if more time is needed to collect sufficient data.

*Example 1:*

Adopt: ADRC flyers will continue to be placed in grocery bags on the days determined to be most successful as they have increased new ADRC customers by five customers or 15%.

*Example 2:*

Adapt: Flyers in grocery bags appear to have resulted in a 3% increase in contacts with the ADRC but were only added to bags on Wednesday (senior discount day). Store staff will be provided with enough flyers to put in grocery bags for two consecutive weeks on both Wednesdays and Fridays.

*Example 3:*

Abandon: Flyers in grocery bags have not resulted in any change in the number of new ADRC customers. There was no increase in customers despite extending the change cycle over an additional two weeks.

**Evaluation and Sustainability Plan**

(Page 3 of the Change Project Report form)

**Project Outcomes**

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

1. **End Date:** Determine the date the change team decided they had done all that they could to meet or exceed their project goal.
2. **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.
3. **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.

1. **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.

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

*Example:* The sustainability leader is Monica.

1. **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.

1. **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 fall 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**

(Page 4 of the Change Project Report form)

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