

## PROCESS IMPROVEMENT WORKSHEET

### 1. WHAT AREA/PRACTICE/PROCESS DO WE WANT TO IMPROVE?

Specific topic within:

- Advance care planning, ethics, communication, IDT coordination and care-planning
- Assessment/management of symptoms/issues (physical, psychological, social, spiritual)  
E.g., pain, dyspnea, food/nutrition, oral care, grief
- Organizational capacity, environment, community  
E.g., hospice utilization, ethics consultation, coordination of spiritual care volunteers
- Emotional and/or spiritual support to patient/family/staff
- Culturally appropriate care for any of the above
- Other

### 2. WHAT DO WE KNOW/BELIEVE ABOUT THE PROCESS?

#### a. Who is involved?

Patient, family, RN, LVN, CNA, MD, MSW, social service coordinator, activities staff, ST, OT, PT, dietitian, chaplain, DON, DSD, medical director, administrator, hospice staff, acute hospital staff, clergy.  
Other:

#### b. What are the actual steps that occur? E.g.,

Patient reports pain to CNA → CNA tells RN → RN assesses pain → RN gives PRN → RN reassesses...  
↳ RN calls MD → MD orders med...  
↳ RN begins non-pharmacological intervention...

Note which steps are sometimes problematic, needing simplification or improvement.

#### c. What are the problems in:

- Knowledge?
- Attitudes?
- Performance?
- Policies & procedures?
- IDT communication & care-planning?
- System, organizational capacity & communication?
- Resources?

#### d. What are the sources of variation?

- Why does the process sometimes work really well?
- Why does it sometimes not work well?

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**e. What useful data are available?**

What data could we easily gather, e.g.,

- Series of single case reviews?
- Reviews of 5-10 charts?
- Surveys of 5-10 people (patients, families, staff, other)?
- Other?

**3. WHAT INTERVENTIONS SHOULD WE TRY?**

- Education
- Policy/procedure change
- New resources
- Monitoring with feedback to staff
- Other

**4. WHO NEEDS TO BE INVOLVED?**

Who will have oversight/organizing responsibility?

**5. WHAT ARE THE BARRIERS AND SUPPORTS?**

**a. What barriers will we encounter?**

- Time, staffing, turnover, money, other resources
- Knowledge, attitudes, performance (staff, physician, administration)
- Competing priorities
- Regulatory fears

**b. What forces, factors, strengths, and motivations support this effort?**

- Potential allies within and outside the organization?
- How can we show that this effort supports the priorities of allies and skeptics?

**c. How does knowledge of barriers and supports inform our strategy?**

- What have we learned from prior efforts to change practice?

**6. HOW WILL WE CHECK TO SEE IF THE INTERVENTION(S) WORKED?**

- Compare new data with previous data?
- Develop new data points?

**7. HOW OFTEN WILL WE REEVALUATE AND DECIDE ON OUR NEXT STEPS?**

When will we meet next?

What is our target date for completing project?

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