IMPROVEMENT PLANNING TOOL

This tool is intended to be utilized at the end of the root cause analysis process. Use this document to plan improvement activities, including goal setting, measurement, and any follow up routines.

Participants

Roles: Facilitator and notetaker

Group Size: 2+

Materials

Note-taking materials for participants: Post its or paper, and pen or pencils.
Shared note-taking space.
In-person: large poster paper (posted prior to engaging in the protocol) and markers.
Virtual: Shared notetaking space, shared screen.

Consider compiling the root cause analysis artifacts or summary documents to bring to the improvement planning meeting.

Instructions for Use

1. **Review the form.** Invite participants to orient to the sections of the form.

2. **Document.** In table 1, document the problem, the 2-3 root causes identified in the root cause analysis process and the supporting evidence.

3. **Identify and document improvement activities.** Select 1-2 high leverage improvement activities to focus on. *Consider utilizing the Affinity Protocol to gather and theme high leverage ideas prior to selecting 1-2 to focus on.*

4. **Develop the plan.** Complete the planning table for each of the high leverage improvement activities identified.

5. **Scheduling.** Schedule: additional planning and follow up meetings.

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Table 1

Problem:	
Root Cause	**Evidence**

High Leverage Improvement Activity 1

Improvement Activity	
Expected Outcome. What is the measurable goal?	
Who will implement?	
Who will monitor improvement? How often?	
By when will the improvement activity be implemented?	
Method of Measurement. What data will be used to measure improvement?	

High Leverage Improvement Activity 2

Improvement Activity	
Expected Outcome. What is the measurable goal?	
Who will implement?	
Who will monitor improvement? How often?	
By when will the improvement activity be implemented?	
Method of Measurement. What data will be used to measure improvement?	