

GUIDELINES FOR THE USE OF THE PILOT PROJECT MANAGEMENT FORM

QUESTION OR ISSUE

- Step 1:** The question or issue is what drives the project.
- Step 2:** What specific patient or staff population does this project affect. Identify stakeholders. This step helps to identify appropriate individuals or departments that will or might be affected by the change or project.
- Step 3:** This is the leader or facilitator that will drive the process. Set up meetings, maintain minutes, etc. Also identify who is the Organization Leader for this project?
- Step 4:** These should be members that are close to the problem.
- Step 5:** Schedule meeting with date, time, location, agenda.

EVIDENCE OR NEED FOR PILOT

- Step 6:** Identify the type of literature that needs to be reviewed. Identify search terms. Identify person responsible for conducting literature search. This could include Evidence-based Practices, Standards of Practice, Policies and Procedures, Research Literature, Performance Improvement, Vendor Literature, Satisfaction Results, Surveys, Expert Opinions, etc.
- Step 7:** Rate the strength and quality of the evidence and summarize results. Identify who will be responsible for this. Will it be an individual, the entire team, a subgroup of the team?
- Step 8:** Make recommendation for the pilot. This should be no longer than a one page document or can be included in meeting minutes. Include where pilot to take place, for how long, and metrics that will assist in evaluating whether results from pilot are favorable or unfavorable.

TRANSLATION

- Step 9:** Discuss with stakeholders and determine if pilot is appropriate.
- Step 10:** Develop plan to implement the pilot. How is the pilot going to be rolled out to individuals/departments that are affected? What is the communication or education plan?
- Step 11:** Implement the pilot after communication and education completed.
- Step 12:** Evaluate pilot using measurable goals/metrics identified early in the process.
- Step 13:** When pilot completed, report results to organization leadership (your Director, VP, etc.). This should have been determined in step 3.
- Step 14:** If pilot favorable, team obtains organizational support to move forward with the full project. If unfavorable what is the next step or plan?
- Step 15:** Identify where the project goes from here. Is it a project that remains within the department but no longer determined a pilot, does it now need to be implemented system-wide, to other units/departments? If so what communication, education, timelines need to be planned?
- Step 16:** If favorable results communicate internally and possibly externally. Consider using Newsletters, posters, manuscripts, etc.