**Process Improvement Plan Template**

**Futureproofing the Community Service Workforce**

A process improvement plan is a simplified project management template to outline next steps and document the scope of the work required for a change. It specifies who will be responsible for completing the work, the milestones and how the work will be accomplished. Providing a clear and actionable framework enables task owners to meet requirements and enhances capacity needed from staff. To effectively implement steps, it is essential to document the what, who, when and how of a project.

To determine next steps, review the answers from section 2 to determine where there are pain points and room for improvement. For each pain point, consider documenting the following:

* **Appoint a lead** as to who is responsible for moving this work forward
* A **high-level timeline** of how long this work may take and an anticipated project start
* Establish a **checklist of key action items** to move this forward
* Establish action items to **evaluate results** to ensure that solving the problem helped the staff in the way you intended.

**Note:** It is possible that not every question that you have identified a pain point is not solvable. It is still useful to identify the pain point to consider future problem solving.

**Example:** Say you identified for the question “Are there simple steps that could be automated?” that there is an Excel sheet that can be uploaded into your data system but is currently being entered in manually.

**Example Process Improvement Plan:**

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| **Key Lead** | *Staff Name* |
| **Timeline** | Approximately 3 to 4 months Possible start: Feb 2024 prior to program launch |
| **Problem to Solve** | When participants complete assessment form and send additional photo ID to Case Managers, Case Managers input the assessment results individually and upload ID for each participant individually. |
| **Key Action Items** | 1. Review the format that the assessment form and additional photo ID is coming in as to ensure it is the same.
2. Ensure that the assessment form is collecting the unique ID that is in the data system
3. Establish a naming convention to store the photo ID (These may not be able to be bulk uploaded)
4. Once the participant does the assessment form online, ensure that in the back end you can easily generate an Excel sheet with unique ID and assessment score
5. Teach Case Managers how to bulk upload scores as opposed to manually
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| **Evaluate Results** | Gather feedback on:* How Case Managers perceive this change
* Any process that broke down, i.e bulk uploading data
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**Template Process Improvement Plan:**

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| --- | --- |
| **Key Lead** | *Staff Name* |
| **Timeline** |  |
| **Problem to Solve** |  |
| **Key Action Items** |  |
| **Evaluate Results** |  |