



*Appendix 0.6*

# *Project Planning*

When implementing new programs or activities, it is recommended that you plan for implementation using tools such as SMART goals and workflows/process maps. Below are general tips, guidance, and resources for using such tools.

## SMART Goals

SMART is a framework for setting actionable, realistic goals. If your overarching goal is broad, such as creating an accessibility program, you may need to break it down into multiple smaller SMART goals. SMART goals are:<sup>1</sup>

**S:** Specific. Target an area for improvement and be specific about what you want to accomplish.

- Outline the who, what, when, where, and why of your goal.
- What specific actions will you take?

**M:** Measurable. Determine what metrics or data you will use to track progress.

- What does success look like?
- Do you have data collection methods to track your goal? Reports, audits, surveys, work products, etc.?

**A:** Achievable. How will you reach your goal?

- Do you have the skills and resources necessary? Do you need to develop them?
- Is your goal challenging but possible?

**R:** Relevant. Define why your goal is important for your organization/department/clinic etc.

- Does your goal align with organizational priorities?
- How will you secure support from leadership?

**T:** Time-bound. Set timelines and deadlines for completion.

- What is the deadline for accomplishing this goal?
- What will you accomplish by the halfway mark?

*SMART Example:* The Quality Improvement team will implement a disability screening and accommodation program by 9/30/2024, with EHR screening beginning by 8/15/2024.

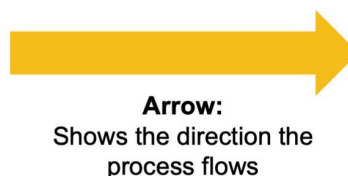
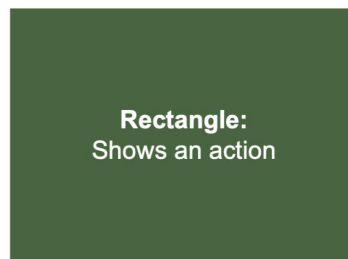
*Not SMART:* Our team plans to implement a disability program.

## Workflows and Process Maps

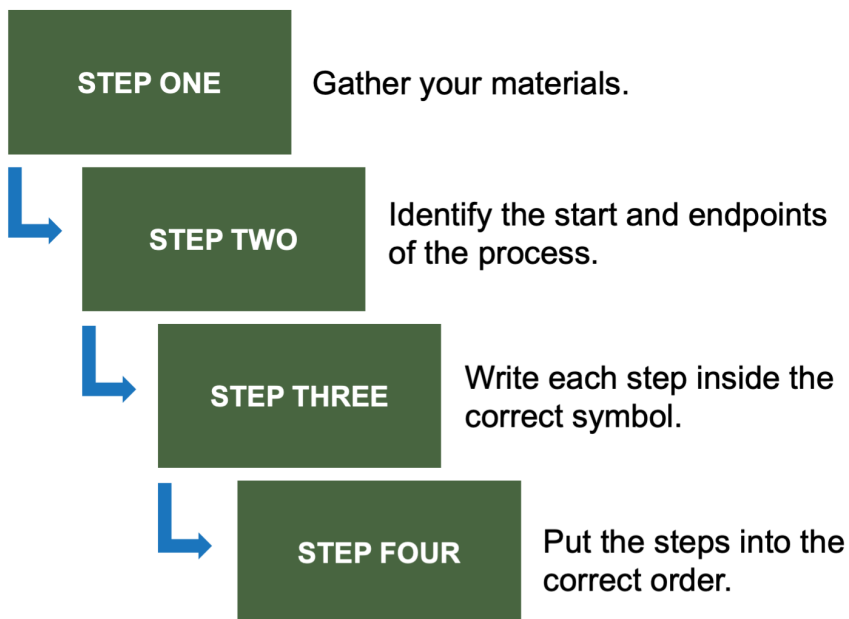
Workflows and process maps are diagrams that illustrate the sequence of steps to completing a task. Roles such as Practice Facilitators or Practice Managers are typically responsible for creating these diagrams. In a healthcare setting, workflows and process maps can help identify problems and potential improvements, be used for training, hold staff accountable, and more.

Below are examples of workflows and process maps in a healthcare setting. The Agency for Healthcare Research and Quality created a module with additional information [here](#).

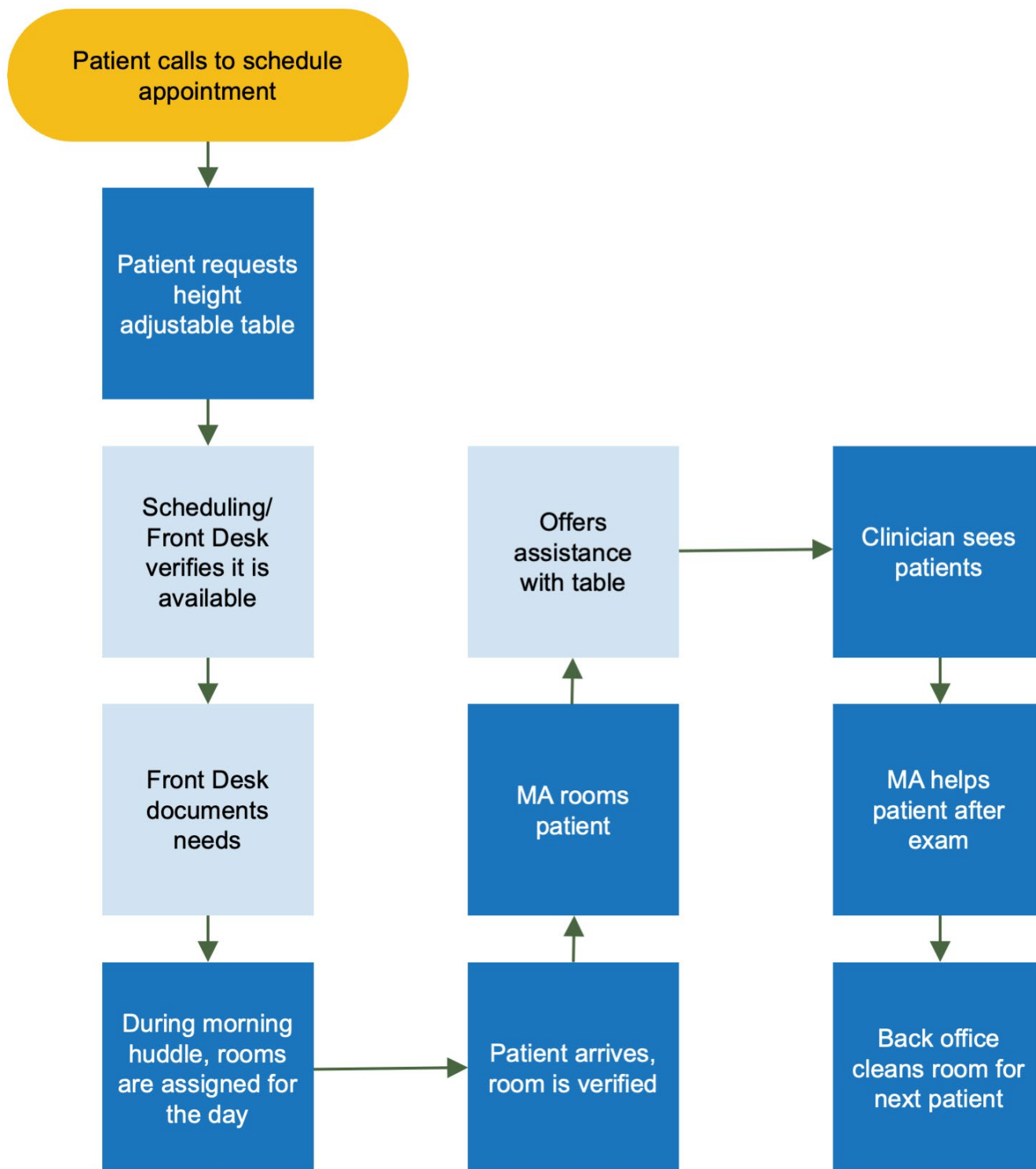
### Symbols for Creating a Process Map



### Steps for Creating a Process Map



Example 1: Providing a Height Adjustable Exam Table



Example 2: Providing a Pocket Talker

