



Showcase for Hopkins Inquiry and Nursing Excellence

SHINE

Conference

Tools to Keep your Inquiry Project Organized

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NURSING

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All individuals involved in the planning and delivery of this activity have no relevant financial relationship(s) with ineligible companies.

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This presentation will not discuss the off-label or investigational use of a drug, biological product, or medical device name.



Ideas? Visions for
improvements?

Be a part of the solution!



Inquiry Project!



Pre project planning



✓ Clear objective/goal with clear deliverables



✓ Realistic scope



✓ Timeline



✓ Awareness of constraints (budgetary, resource)



✓ Group of experts and stakeholders including

✓ Local and executive change leaders, frontline clinicians who will be directly impacted, patient/family reps if impacted



✓ Key Performance Metric (KPI)

Group Projects: What could go wrong?!



Decreased
collaboration

Uneven
distribution of
work

Difficulty managing
tasks

Unclear
expectations on
who is doing what

No specific plan to
achieve milestones
and deliverables

Working in silos,
redundant work

Difficulty
scheduling

Documents
scattered in
different locations

Work is not
tracked

Insert: Project Planning Tools!



Benefits of using project tools:

- Improved collaboration, communication, and teamwork (working together)
- Central location, increased efficiency
- Better defined expectations, accountability
- Effective task management
- Better planning and scheduling
- Enhanced visibility and transparency
- Consistency and standardization (templates, defined communication channels)
- Ability to track work done so it can be altered or replicated for future projects/scalable





Insert: Project Planning Tools!

1.A3


2.Smartsheet™ Project Planning

3.Excel™ Gantt Chart



Teams

Project Tools: A3

 [A3: your project title here] (NAME: PROJECT ID: AND NUMBER)
AI Faculty:
Revision Date:

Define: Problem Statement: <i>Fill in here from your problem statement template.</i>																																				
Key Metric/Process Metric: <i>Fill in here from your key metric template.</i>	Objective / Goal: <i>Fill in here from your goal template.</i>																																			
Team <i>Identify team members following stakeholder analysis. Include name, title, and role of the project.</i>																																				
Measure Prior/Current Year Data: <i>Trend your key metric over time, including baseline and post-intervention data.</i>																																				
Analyze: Identifying & Prioritizing root causes of failures <i>Copy your process map, fishbone, and key driver diagram here.</i>																																				
Improve <table border="1"><thead><tr><th>#</th><th>Action</th><th>Responsible</th><th>Due</th><th>Status</th></tr></thead><tbody><tr><td>1</td><td>List key interventions to plan/finalize</td><td>Who?</td><td></td><td></td></tr><tr><td>2</td><td></td><td></td><td></td><td></td></tr><tr><td>3</td><td></td><td></td><td></td><td></td></tr><tr><td>4</td><td></td><td></td><td></td><td></td></tr><tr><td>5</td><td></td><td></td><td></td><td></td></tr><tr><td>6</td><td></td><td></td><td></td><td></td></tr></tbody></table> <i>Interventions must be based on information learned in Analyze.</i>		#	Action	Responsible	Due	Status	1	List key interventions to plan/finalize	Who?			2					3					4					5					6				
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6																																				
Control: Achieving High Reliability Improvement Verification & Future Stability: <i>Fill in here from your control plan template.</i>																																				

- Simple
- One-pager
- PPT, easy to share
- Includes key elements for any project
- Accessible JHM templates



[A3: your project title here]

[Your Name as A3 Owner]
 AI Faculty:
 Revision Date:



Define

Problem Statement:

Fill in here from your problem statement template.

Key Metric/Process Metric:

Fill in here from your key metric template.

Objective / Goal:

Fill in here from your goal template.

Team

Identify team members following stakeholder analysis. Include name, title, and role of the project.

Measure

Prior/Current Year Data:

Trend your key metric over time, including baseline and post-intervention data.

Analyze: Identifying & Prioritizing root causes of failures

Copy your process map, fishbone, and key driver diagram here.

Improve

#	Action	Responsible	Due	* Status
1	List key interventions to pilot /finalize	Who?		
2				
3				
4				
5				

Interventions must be based on information learned in Analyze.

Control: Achieving High Reliability

Improvement Verification & Future Stability:

Fill in here from your control plan template.

Project Tools: smartsheet TM



- Free and Paid versions
- Desktop version, online version, smartphone app
- It is used to assign tasks, track project progress, manage calendars, share documents, and manage other work, using a tabular user interface.
- Helpful if all teammates use the tool

Smartsheet™ : task tracker

The screenshot displays the Smartsheet Task Tracker interface. At the top, there's a navigation bar with 'smartsheet' logo, an 'Upgrade' button, and '30 Days Left'. A search bar is on the right. Below the navigation bar, there are tabs for 'File', 'Automation', 'Forms', and 'Connections', and a 'Task Tracker' title with a star icon. A 'Share' button is also present. The main workspace shows a task list with columns for Task, Description, Assigned To, Status, Start Date, End Date, and At Risk. The tasks are organized into phases: Initiation, Planning, and Launch. The 'Engagement' task is highlighted in red, indicating it is currently in progress.

Task	Description	Assigned To	Status	Start Date	End Date	At Risk
1	Talk on Project Tools	KB K8 Br		01/07/24	04/15/24	<input type="checkbox"/>
2	Initiation					<input type="checkbox"/>
3	Acceptance	KB K8 Br	Complete	01/07/24	01/09/24	<input type="checkbox"/>
4	Deliverables	KB K8 Br	Complete	01/08/24	01/09/24	<input type="checkbox"/>
5	Time Blocking	KB K8 Br	Complete	01/09/24	01/15/24	<input type="checkbox"/>
6	Planning					<input type="checkbox"/>
7	Barriers	KB K8 Br	Complete	02/01/24	02/06/24	<input type="checkbox"/>
8	Objectives	KB K8 Br	Complete	02/01/24	02/09/24	<input type="checkbox"/>
9	Outline	KB K8 Br	Complete	02/09/24	02/12/24	<input type="checkbox"/>
10	Slides	KB K8 Br	Complete	02/12/24	02/15/24	<input type="checkbox"/>
11	External Review	AP Aviv Perez	Complete	02/15/24	02/19/24	<input type="checkbox"/>
12	Approvals	KB K8 Br	Complete	02/28/24	02/29/24	<input type="checkbox"/>
13	Practice	KB K8 Br	Complete	02/19/24	03/20/24	<input type="checkbox"/>
14	Launch					<input type="checkbox"/>
15	Receipt	GG Guadalupe Garcia	Complete	03/01/24	03/01/24	<input type="checkbox"/>
16	Back-up Files	KB K8 Br	Complete	04/08/24	04/12/24	<input type="checkbox"/>
17	Engagement	KB K8 Br	In Progress	04/15/24	04/15/24	<input checked="" type="checkbox"/>
18	Objectives	KB K8 Br	In Progress	04/15/24	04/15/24	<input type="checkbox"/>
19	Feedback	KB K8 Br	Not Started	04/15/24	04/15/24	<input type="checkbox"/>

Smartsheet™ : calendar view

The screenshot displays the Smartsheet interface in calendar view. At the top, the Smartsheet logo is on the left, followed by an 'Upgrade' button and '30 Days Left' notification. A search bar is on the right. Below the header, navigation tabs include 'File', 'Automation', 'Forms', 'Connections', 'Task Tracker', and 'Share'. A toolbar contains icons for save, print, undo, redo, calendar view, filter, and view options (list, calendar, gantt). The main area shows a calendar for February 2024 with a '1 Month' navigation control. A task tracker grid is overlaid on the calendar, with tasks represented as blue pills in specific date cells. A sidebar on the left contains navigation icons, and a right sidebar contains utility icons.

February 2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
January 28	29	30	31	February 1 Barriers Objectives	2	3
4	5	6	7	8	9 Outline	10
11	12 Slides	13	14	15 External Review	16	17
18	19 Practice	20	21	22	23	24
25	26	27	28 Approvals	29	March 1 Receipt	2

February 2024 calendar grid (left sidebar):

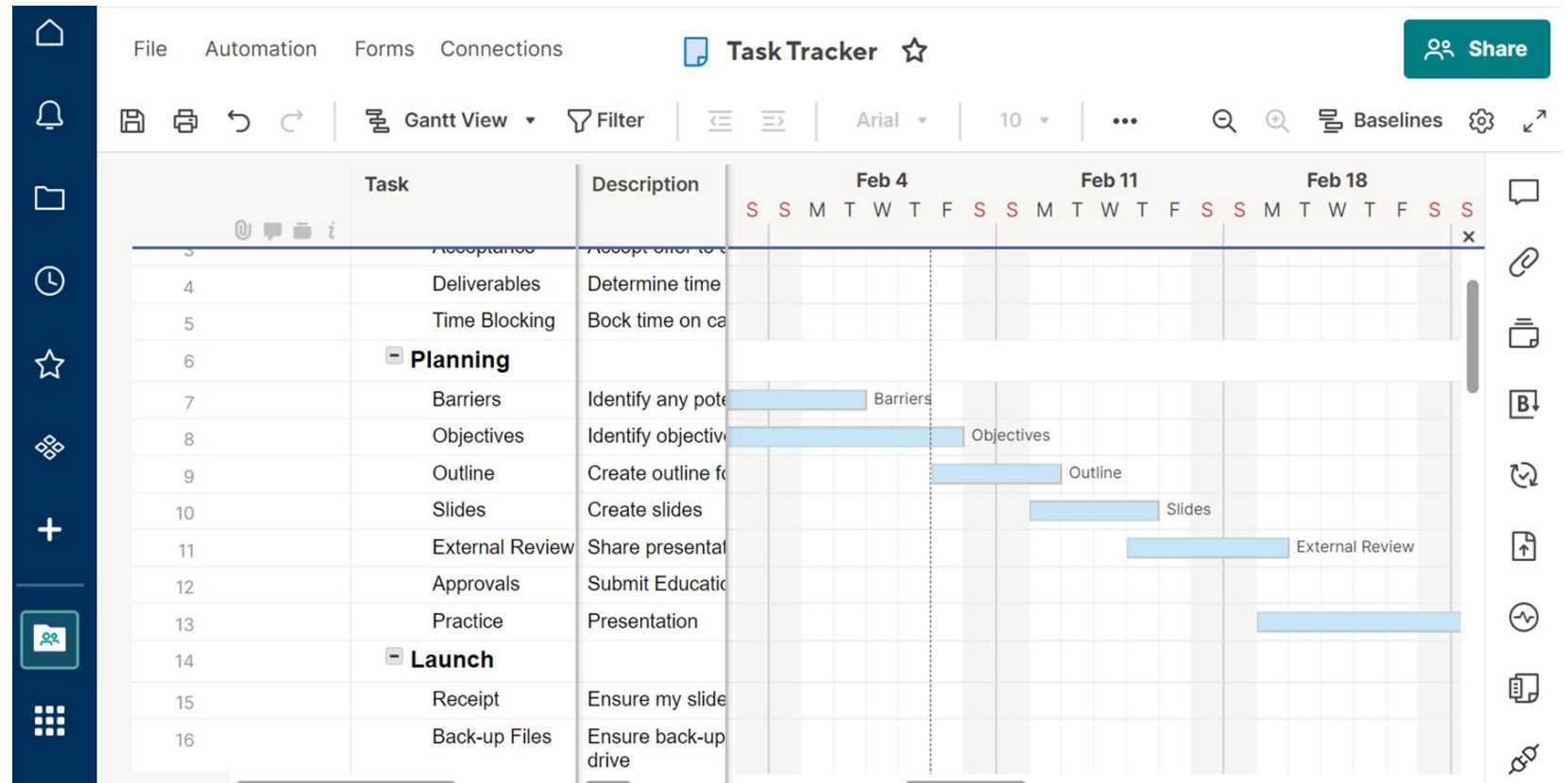
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March 2024 calendar grid (left sidebar):

S	M	T	W	T	F	S
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

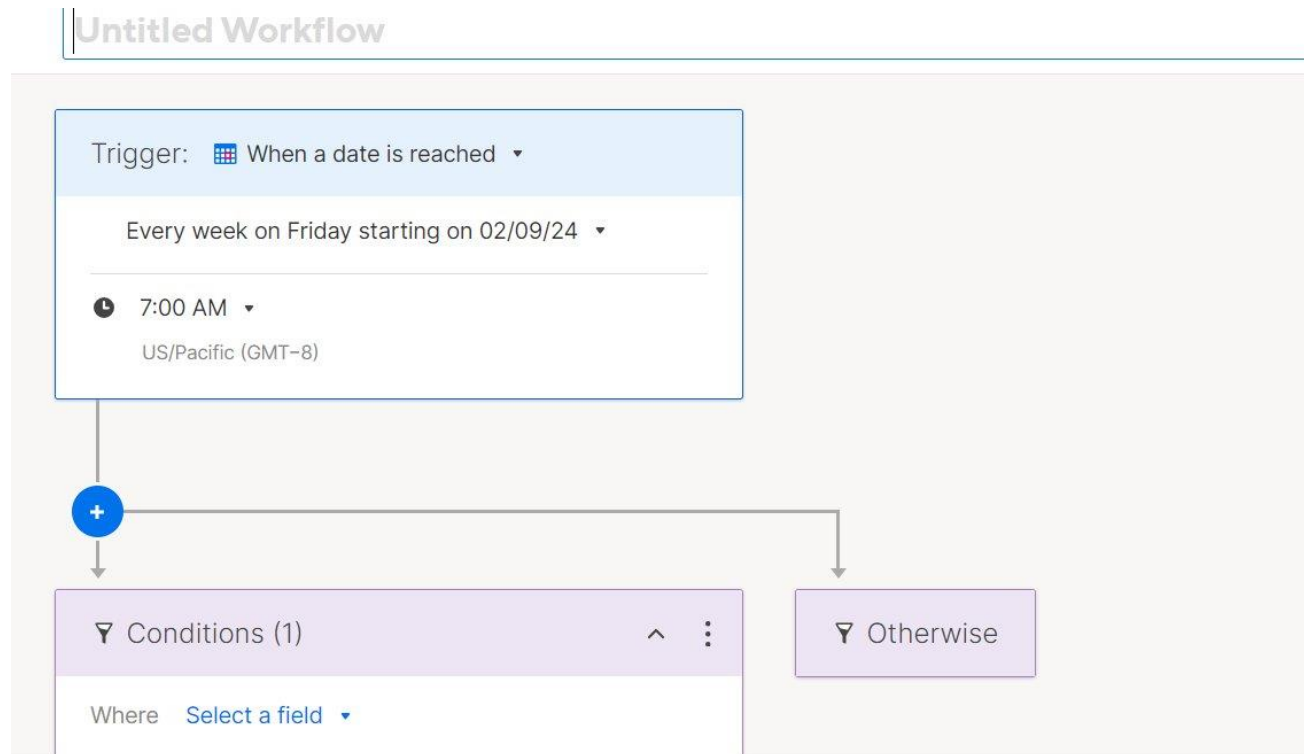
Smartsheet™ : Gantt chart view

- Start Dates/End Dates
- Durations
- Dependencies



Smartsheet™

- **Can create triggers to send weekly updates**



Project Tools: ExcelTM Gantt Chart

Book1 - Excel

New

← All 🔍

←

Info

New

Open

Save

Save As

History

Print

Share

Export

Publish

Close

Account

Feedback

Options

The 'Project Planner' Gantt chart shows a grid with columns for months from January to December. The left side contains a list of activities, and the right side shows colored bars representing the duration of each activity across the months.

Gantt project planner

The 'Agile Gantt chart' displays a grid with columns for weeks. It features a list of tasks on the left and horizontal bars of various colors (blue, green, purple) representing task durations over time.

Agile Gantt chart

The 'Date tracker Gantt chart' is a dark-themed chart with a grid. It shows a list of tasks on the left and horizontal bars in light green and blue, indicating task progress or duration against a timeline.

Date tracker Gantt chart

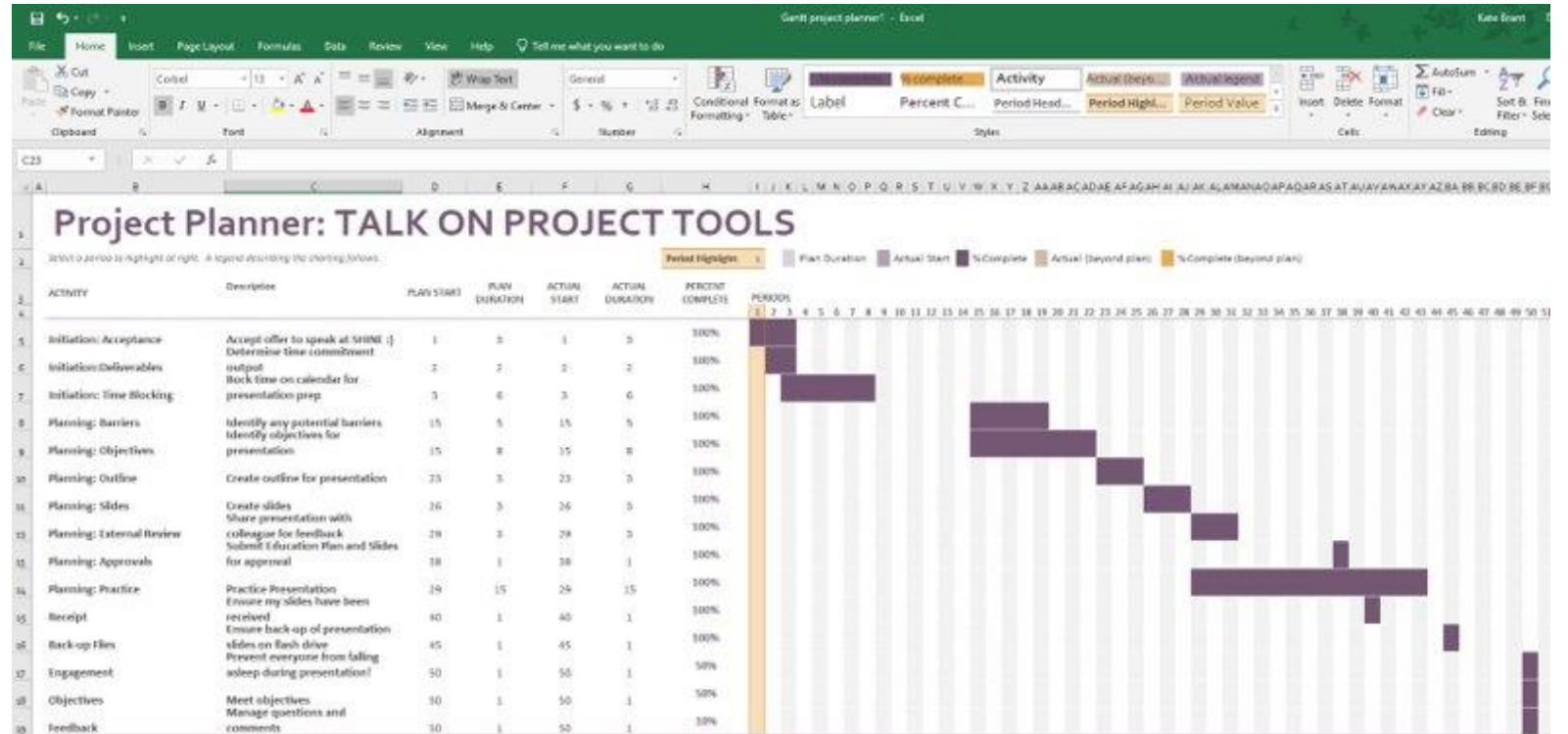
The 'Date tracking Gantt chart' features a grid with columns for months. It includes a list of tasks on the left and horizontal bars in shades of green, representing task timelines.

Date tracking Gantt chart

The 'Simple Gantt chart' is titled 'Europa project' and shows a grid with columns for months. It contains a list of tasks on the left and horizontal bars in purple and pink, illustrating task durations.

Simple Gantt chart

Project Tools: ExcelTM Gantt Chart





Teams

**Central Location
for Project
Documents and
Resources**



Project Planning Tools!



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1. A3
2. Smartsheet™ Project Planning
3. Excel Gantt Chart



Questions?

Disclaimer: I have no affiliation or relationship with the suppliers of these products. The opinions expressed in this review are based on my independent assessment and evaluation. While I strive to provide accurate and unbiased information, readers should conduct their research and consider their unique needs before making any decisions.

References

Rew L, Cauvin S, Cengiz A, Pretorius K, Johnson K. Application of project management tools and techniques to support nursing intervention research. Nurs Outlook. 2020 Jul-Aug;68(4):396-405. doi: 10.1016/j.outlook.2020.01.007. Epub 2020 Mar 3. PMID: 32138975.