Generalist Palliative Care Implementation
PROJECT AND EVALUATION PLAN TEMPLATE

SMART Objectives

The SMART format ensures that your project objectives are specific, measurable, attainable, relevant, and time-bound. We recommend that you follow the prompts below and create a three- to four-page plan.

Specific

1. **What are the objectives of your project?** List activities needed to accomplish your objectives. Detail who will be responsible for each; when, where, and how often each activity will occur; who will participate in each activity (e.g., emergency department registered nurses); and how many will participate.

Measurable

2a. **Describe the specific group of patients who are the focus of the project** (e.g., patients over age 65 cared for by the partner service line), including how they will be identified.

 i. How many patients could benefit from the processes you are implementing in your project?
 For example, if the project is focusing on pain screening and management in the radiation oncology clinic, how many patients are seen in this clinic annually who should have pain screening? An actual count is preferred. A best estimate is also acceptable.

 ii. How you will track the number of patients who received the processes you implemented in your project?
 For example, how many patients who were seen in the radiation oncology clinic received appropriate pain screening? How many patients had a positive screen and had a pain management plan implemented?

2b. **In addition to the metrics above, we suggest you choose at least two additional metrics** that will help you and service line and medical center leaders to know whether you have achieved your project objectives and to give you information to help sustain your project. In selecting metrics, consider:

 i. Choosing metrics you already have easy access to, or can easily get access to, and that won't take too long to collect and analyze

 ii. Quantitative approaches (e.g., counts and percentages) and qualitative approaches (e.g., themes from interviews with service line stakeholders)

 iii. Process metrics (e.g., number of trainings held) and outcome (e.g., number of patients who died in the intensive care unit)

 iv. The domains of the RE-AIM framework, which was designed to evaluate public health initiatives:

 ➤ **R**each into the target audience — for example, if a training was offered to clinicians in the partner service line, how many completed it?

 ➤ **E**ffectiveness/efficacy — for example, if the project goal was to document advance care planning discussions for 70% of patients who have serious illness, what percentage of them had a discussion documented?

 ➤ **A**doption by target audience — for example, if the target behavior was screening for pain, how many clinicians in the target audience performed that behavior?

 ➤ **I**mplementation — Was the project implemented as planned? What adaptations were made? What resources were needed to implement the project?

 ➤ **M**aintenance of intervention effects in patients and settings over time — for example, three months after the end of the project, are clinicians still performing the target behavior?

2c. Who are the audiences you need to share this information with (e.g., partner service line clinicians and leaders, medical center leaders)? Who will be responsible for gathering, analyzing, and summarizing data for presentation?

Achievable

3a. List the knowledge, skills, and experience needed by the project team to accomplish your project and evaluation. Where (from which team member or other person) you will get these?

3b. What team member effort is required for the project and evaluation? How is this time paid for (i.e., funded by a grant, part of job scope of work, funded by another initiative)?

3c. What other resources are needed to complete your project and evaluation? Who will supply these?

3d. What other factors influence your ability to compete the project and evaluation? Will some stakeholders be resistant to any of the project activities? How will you navigate this?

3e. What resources, including team member effort, are needed to sustain the project after initial implementation, and who would supply these?

Relevant

4a. What are the most significant factors from the *Predisposing, Enabling, & Reinforcing (PER) Factors Planning Worksheet* completed during your needs assessment that support your target audience in performing the target behavior? What are the most significant barriers or negative reinforcements? How does your project specifically address each of these?

4b. How does your project align with the strategic plan of your unit, program, and/or organization?

Time-Oriented

5. Provide a timeline for completion of key project and evaluation activities.

Additional Guidance on Project Evaluation Plans

Recommended Elements

Evaluation plans should include a description of the specific group of patients who are the focus of the project and how they will be identified. In addition, we suggest you provide a count of those patients and that you describe the method to be used to determine how many received the target behavior your project is focusing on.

6a. Description of the specific group of patients who are the focus of the project and identification method
For example, patients over age 65 who visit the emergency department (ED); this information is tracked in ED visit records and is already available in a standard ED report.

6b. The number of patients who could benefit from the processes you are implementing in your project
An actual count is preferred. A best estimate is also acceptable.

6c. Method for tracking the number of patients who received the processes you implemented in your project
For example, the number of patients seen in the radiation oncology clinic who received appropriate pain screening will be tracked by looking at the completion rate for a pain score field incorporated into the clinic flow sheet.

In addition, we suggest you choose at least two additional metrics that will help you assess the impact of your project and whether you have achieved your project objectives. We recommend that metrics in your evaluation plan should fit into the RE-AIM structure (see 2b, item iv on page 1). While all RE-AIM topics are important, we strongly recommend you use at least one metric that speaks to effectiveness/efficacy.

Metric Characteristics

You should consider the characteristics of your proposed metrics — are the data needed for each metric available, feasible to collect and analyze, and is the metric important/meaningful to people who will be making decisions about sustaining or expanding your project? If it is helpful, you can use the below questions to assess the characteristics of metrics that you might include in your final evaluation plan.

7a. Metric description
For example, percentage of patients with serious illness seen in the primary care clinics with a documented goals of care discussions

7b. Suggested data (list all elements)
Examples:

➤ Number of patients seen in target clinics with serious illness (denominator)

➤ Number with documented goals of care discussions (numerator)

7c. Data source(s)
Where specifically can you find all of the required data elements listed in 7b, above?

7d. Feasibility
Are needed data already being captured for another purpose?

➤ If yes, how will you access the data for this project? Who will extract the data? How often? Will some analysis work be needed? Who will do that work?

➤ If no, who will manage data collection, data entry, and analysis chores?

    ➤ Do those tasked with collecting data and doing data entry know this will be required?

    ➤ Is data collection integrated into the workflow?

    ➤ Who will analyze the data? How often?

    ➤ Is it possible to use a different metric that doesn't require manual data collection/entry?

7e. Importance
Who cares about this metric?

➤ Has a stakeholder indicated that performance on this metric will influence decisions to support or expand the project going forward? Have you verified this?

➤ Are there other metrics your stakeholders value more?