

Quick Reference Guide

For BC Renal Guide for Project Planning and Evaluation

BC Renal’s Guide for Project Planning and Evaluation takes you step-by-step through our **7-Step Process for Project Planning and Evaluation (Figure 1)**. The seven steps align with the quality improvement process of plan, do, study, act¹ and are embedded in the project life cycle: plan, implement, communicate and disseminate.

- **Steps 1 through 3** are focused on **project planning** as a whole with consideration of evaluation within those steps.
- **Step 4** delves into **evaluation planning** in more detail once the project has been defined with key stakeholder input.
- **Steps 5 through 7** focus on **implementation** and ensuring **use and communication** of the evaluation results.

The [BC Renal Patient and Family Engagement Framework](#) outlines the importance of partnering with patient and family voices where applicable in improvement efforts to ensure person- and family-centred kidney care, and ultimately, to optimize patient experience and outcomes. The framework is a foundational guide to authentic and meaningful patient and family engagement in BC Renal. Therefore, it is strongly recommended that project teams consider the involvement of patients and families and apply the framework and its **7-Step Circle of Patient and Family Engagement (Figure 2)** in parallel to our **7-Step Process for Project Planning and Evaluation**, as appropriate. For any inquiry and assistance in these regards, please contact patientengagement@bcrenal.ca.

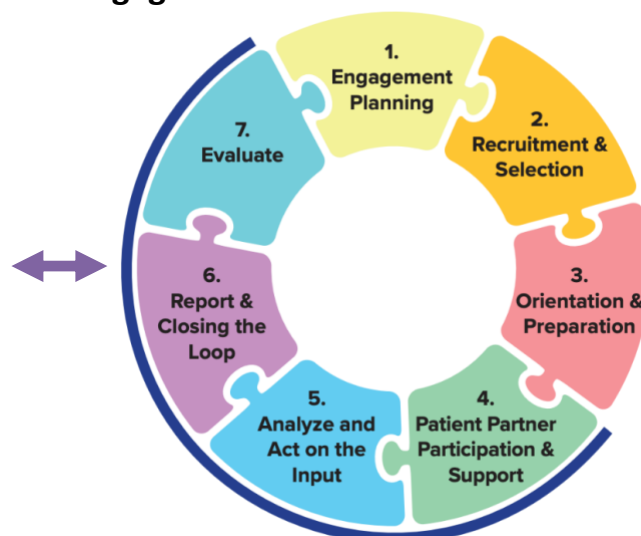
Figure 1:

7-Step Process for Project Planning and Evaluation



Figure 2:

7-Step Circle of Patient and Family Engagement



7-Step Process for Project Planning and Evaluation

Step		Activities	Roles	Tools & Templates
Step 1: Define Project	PLAN	<input type="checkbox"/> Identify a quality improvement (QI) area <input type="checkbox"/> Set SMART goal/objectives and ensure strategic alignment <input type="checkbox"/> Identify key stakeholders <input type="checkbox"/> Estimate resource requirements <input type="checkbox"/> Complete project proposal	<ul style="list-style-type: none"> Chair/ lead/ delegate Project manager 	<ul style="list-style-type: none"> Committee Project Proposal Template
Step 2: Engage Stakeholders		<input type="checkbox"/> Engage stakeholders <input type="checkbox"/> Define primary and secondary stakeholders and proposed communication approach <input type="checkbox"/> Set governance structure for project <input type="checkbox"/> Establish project team (evaluation resource)	<ul style="list-style-type: none"> Chair/ lead/ delegate Project manager 	<ul style="list-style-type: none"> Project Charter Template Engagement planning questions (p. 9- BC Renal Patient and Family Engagement Framework)
Step 3: Refine Project		<input type="checkbox"/> Describe project/define scope <input type="checkbox"/> Use a planning tool <input type="checkbox"/> Review project goal/objectives with project team <input type="checkbox"/> Develop a project plan	<ul style="list-style-type: none"> Chair/ lead/ delegate Project manager Project team or committee 	<ul style="list-style-type: none"> Project Charter Template Logic Model or Driver Diagram Template Project Plan Template
Step 4: Plan Evaluation		<input type="checkbox"/> Establish evaluation working group <input type="checkbox"/> Identify context for evaluation and audience <input type="checkbox"/> Define evaluation framework <input type="checkbox"/> Define evaluation scope/timelines to inform resource requirements <input type="checkbox"/> Develop evaluation plan including a communication plan	<ul style="list-style-type: none"> Chair/ lead/ delegate Project manager Analyst Evaluation working group 	<ul style="list-style-type: none"> Logic Model or Driver Diagram template Evaluation framework template Evaluation plan template Communication options template
Step 5: Collect and Analyze	DO	<input type="checkbox"/> Collect data <input type="checkbox"/> Analyze and interpret data	<ul style="list-style-type: none"> Same as Step 4 	<ul style="list-style-type: none"> Customized to project
Step 6: Reflect and Learn	STUDY	<input type="checkbox"/> Justify conclusions <input type="checkbox"/> Reflection and learning	<ul style="list-style-type: none"> Same as Step 4 	<ul style="list-style-type: none"> (No templates)
Step 7: Report and Use	ACT	<input type="checkbox"/> Communicate/report results <input type="checkbox"/> Ensure use and share lessons learned	<ul style="list-style-type: none"> Same as Step 4 	<ul style="list-style-type: none"> Communication options template