Goals to Scope: Turning a Needs Assessment into an Action Plan

1. The results of your needs assessment show that one of the highest ranked sources of dissatisfaction among clinicians is with the content and results of the conversation about PSA testing; your clinicians are concerned that they either short-change or omit the conversation due to time constraints. They do not prefer to practice this way but do not have time to either improve the conversation or re-engineer how they practice.
2. A Cochrane Review shows that when patients are exposed to decision aids they have: improved knowledge, higher likelihood of choosing rather than being unsure, and better agreement between values (things they care about) and choice implemented.
3. Your faculty has viewed the decision aid, "Is a PSA Test Right for You?" and would like their patients to view it prior to annual visits. They are interested in improving knowledge so the conversation can be about values and preferences, but also want to know what differences this practice change will make in terms of quality, satisfaction, and cost.
4. They are willing to support process and system changes to integrate use of decision aids, and want to keep any patient and clinician evaluation burden to a minimum.
5. Step 1: you define the goals of the project as:
6. Step 2: you map current workflow
7. Step 3: you revise current workflow to show what changes are needed, where, and by whom.
8. Based on an analysis of how broad the scope will need to be in order to successfully achieve your goals, you determine that the scope of the project will include: systematic use of a decision aid for eligible patients, and a low tech low intensity research component that will help your practice to determine what the differences in quality, satisfaction and cost are between current practice and this intervention.

See Sample Goals-to-Scope Flowchart