# Process Owner Handoff Checklist

**During QI project**

* Identify and engage appropriate Process Owner during project (often a manager responsible for the process being improved)
  + Involve senior leadership and/or project sponsor in the identification of and communications with the Process Owner

**As QI project wrapping up**

* Have senior leadership/project sponsor sign off that QI team has completed project
  + All goals achieved or more than 90 days past final WS/time frame in aim statement
* Prepare a summary of the project for the Process Owner
  + Provide key summary documentation – Final storyboard, the *new* Value Stream Map of improved process, project charter, current newspaper showing all items completed
  + Provide a high level timeline of the tasks and dates the Process Owner will need to address
  + Provide list of measures to be monitored and related measurement table entries
  + Provide a list of “red flags” that should alert the Process Owner to signs of potential problems/slippage (e.g., levels where the measures being monitored have dropped to a point that is concerning)
  + Provide list of staff involved in the improved process and their new roles and responsibilities related to the project (should be added to their workplans/position descriptions/job descriptions)
  + List of milestones that would be good to celebrate in upcoming months/years
  + Communication plan, including the reporting plan to QI Council and/or senior leaders
* Prepare a list of Process Owner key responsibilities for assuring the gains will be sustained
  + Add the key responsibilities to the workplan/job description of Process Owner
* Hold one or more handoff meetings between QI team (or QI team lead) and Process Owner

**After QI project complete/handoff**

* Do a 30-day, 90-day, and one year check-in huddle between QI team (or QI team lead) and Process Owner to problem solve any questions or issues that have arisen
* Process Owner holds quarterly check-in/report out to Senior Leaders/Sponsor/QI Council (may want to do more frequently the first quarter or two)