|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| I. Date |  | | | |
| II. QI Project Name |  | | | |
| III. Organization and Dept. or Branch and QI 101 Wave |  | | Wave: | |
| IV. Summary of Aim  Insert a brief summary, not the full aim statement. For example, use only the first line of the aim. |  | | | |
| V. Measurable Goals for the Project  See Charter or Measurement Plan. Be sure to include baseline, target, and actual result for each goal. |  | | | |
|  |
| VI. Intangible Benefits  Important benefits derived from the QI project, but it is not possible to place a monetary value on them, e.g., improved staff morale, improved teamwork. |  | | | |
| VII-A. Financial Benefits for **Internal** Process Improvements - Annualized  Tangible monetary benefits derived from the QI project for your agency only, e.g., reducing lead time results in overtime salary reduction, eliminating printing, postage or supplies costs, increasing patient volume results in increased revenue. Excludes community benefit. |  | | | |
| Total Financial Benefits for **Internal** Process Improvements - Annualized: | $ | | | |
| VII-B. Financial Benefits to **External** Community - Annualized  Tangible monetary benefits derived from the QI project that benefits the community at large, e.g., improving vaccination rates or tobacco prevention methods decreases disease in the community and related costs of medical attention. Excludes Internal process improvements. |  | | | |
| Total Financial Benefits to  **External** Community - Annualized: | $ | | | |
| VIII-A. Project Costs  The one-time costs to implement the QI project, primarily salary associated with team time spent on the project. Team time begins with the Kickoff event and ends 60 days post-Workshop 2. The cost of supplies and equipment purchased to implement the project are included, however, LHDs do not include items that are purchased with CPHQ grant funds. |  | | | |
| Total Project Costs: | $ | | | |
| VIII-B. Recurring Costs Annualized  Increased operating costs that will be routinely incurred to continue the changed process. For example, adding a quarterly mailer would be a new and ongoing cost. |  | | | |
| Recurring Costs Annualized: | $ | | | |
| Definitions and Formulas: Return on Investment (ROI) and Economic Impact (EI)  ROI: A performance measure used to evaluate the efficiency of an investment (the QI project); usually a ratio or %.  ROI Formula: Total Benefits-Total Costs / Total Costs  EI: Refers to and compares costs and benefits of the QI project.  EI Formula: Total Benefits-Totals Costs | | | | |
| **Sponsor Approval** - *Please complete and sign, and scan this signature page to the designated CPHQ staff member.*  Thank you for supporting your team throughout the QI 101 program. This ROI report reflects the team’s hard work and accomplishments. As QI Team Sponsor, your signature below acknowledges the following:   1. You have reviewed (and shared with leadership in your area, as necessary) and hereby approve the ROI/EI work performed by your QI team. 2. The CHPQ has permission to share this ROI report for the purposes of enhancing education to other QI teams, updating CPHQ stakeholders regarding the benefits derived by teams via the QI 101 program, and informing other public health advocates about this ROI methodology by way of publication, conferences, etc. Please check one or both of the following options:   □ Allow use as long as our organization’s name is not included  □ Allow use with our organization’s name included | | | | |
| Sponsor Printed Name and Title | | Sponsor Signature | | Date Signed |
| Organization | | QI Project Name | | QI 101 Wave |

**ROI and EI Calculations**

