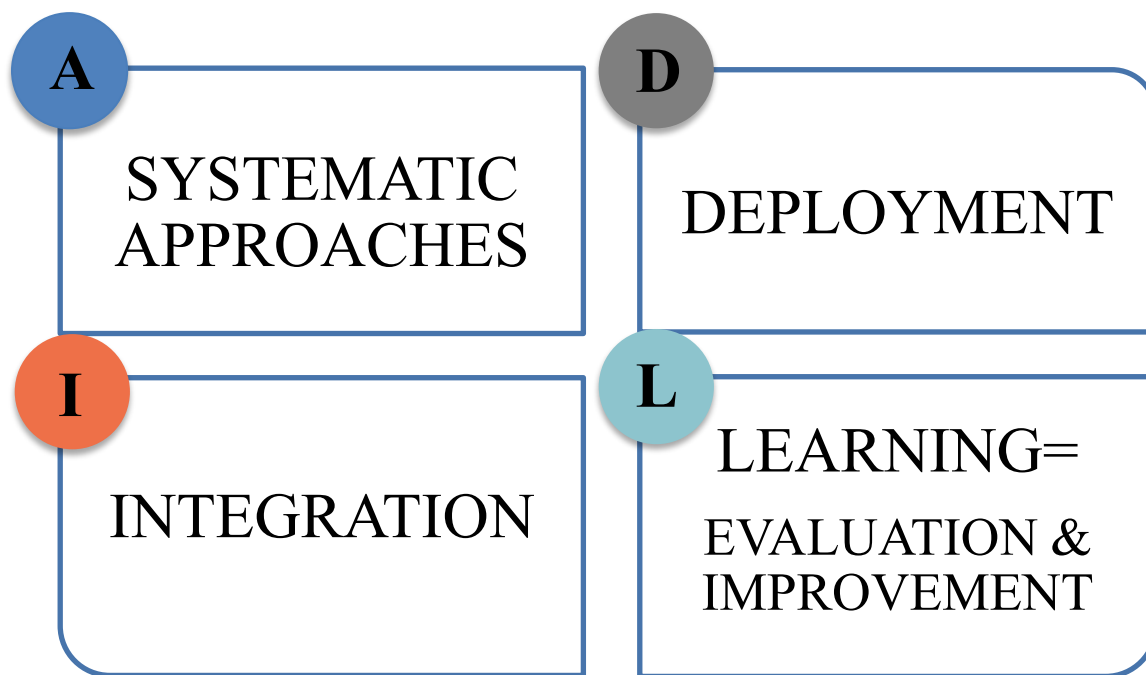


Process Evaluation Tool (ADLI-Based)

This structured guide is designed to help organizations assess their processes and supplement the QAPI efforts.

Understanding Elements of an Effective, Systematic Process

High performing organizations have **effective, systematic processes** that are well integrated and emphasize **proactive, continuous evaluation and improvement**. Effective, systematic processes have four key elements: **Approach, Deployment, Learning, and Integration (ADLI)**.



Approach

Processes should be **systematic, repeatable, and effective** at achieving their intended goals. Think of it like following a recipe—each step is clearly linked to the desired outcome.

Deployment

Approaches must be **implemented across all relevant areas and individuals** within the organization.

Learning

Processes should include **built-in opportunities for evaluation and improvement**. Wherever possible, evaluations should be **fact-based**, and improvements should be implemented based on findings.

Integration

Processes should demonstrate **alignment and harmonization** with organizational plans, measures, actions, and results, driving overall effectiveness and efficiency.

These processes ultimately lead to results.

How to Use This ADLI Evaluation Tool?

Use the Graphic Organizer to systematically review your process with the ADLI elements. For a clear, step-by-step guide, watch our [How-To Video](#) demonstrating the tool in action.

- 1. Select a Process:** Choose a process critical to your organization's success.
- 2. Describe the Process:** Before you begin completing the Graphic Organizer, ensure that you have a brief outline of its steps and purpose available for your evaluation.

If necessary, use page 3 of this packet to write out your process' steps.

- 3. Generate Guiding Questions:** use the blank Graphic Organizer, found on page 4, to generate guiding questions for your ADLI evaluation:
 1. In the center circle, write the process that you are reviewing.
 2. From the center circle, you'll address the boxes in a clockwise fashion.
 3. Consider the example questions provided in each of the boxes, these are intended to provide a basis to generate more questions to exam that specific element of ADLI against your process.

Check out completed graphic organizer examples on pages 5-7.

- 4. Respond to Guiding Questions:** Once you've generated additional questions for each of the ADLI elements, take time to review those questions against your process. As you address these questions, you may note gaps or find some questions challenging to answer. Those are good indicators that there are areas and opportunities for improvement.

- 5. Document Responses:** Use page 8 to record your responses, observations, and initially identified improvement opportunities to be shared with your team for further consideration.

- 6. Share Findings:** Bring the Graphic Organizer and documented finding to your QAPI process for debrief and discussion. The desired outcome of these conversations is to determine the adjustments and changes, based on your ADLI review findings, necessary for your process to improve. Ideally, incorporate this evaluation tool into your ongoing QAPI efforts.

Example Completed Graphic Organizers

There are examples of completed graphic organizers for reference in the pages that follow.

- Page 5: Example 1 - Staff Onboarding and Orientation
- Page 6: Example 2 - Listening to Customers
- Page 7: Example 3 - Strategic Planning

Process and Steps for ADLI Review

Process Overview:

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Steps:

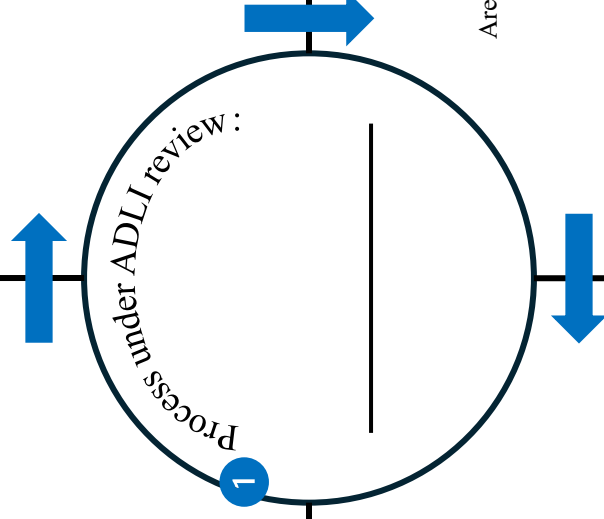
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2 (A) Approach:

Is there a clear process? (ie. Steps or consistent collection of activities that form actions that can be repeated and sustained systematically over time?)

3 (D) Deployment:

Is the process being used across all areas or departments that would be impacted or pertinent to?
Are there any areas or departments that should be using it but aren't?



5 (I) Integration:

Does your process align with your organizations mission, vision, and needs?
Does this process support, inform, or complement the work of your organization and strategic planning?

4 (L = E + I) Learning:

Is your approach evaluated and improved?
(Could it be done better, faster, or more accurately?)
How do you know your process is working as well as it could be?
Are your improvements/refinements shared throughout your organization?

2 (A) Approach:

Is there a clear process? (ie. Steps or consistent collection of activities that form actions that can be repeated and sustained systematically over time?)

- How long does it take to complete this process (ie. the cycle time)?
- Are there steps that aren't being completed or repeated?
- Are there steps that can be removed? Are there steps that need to be added?

5 (I) Integration:

Does your process align with your organizations mission, vision, and needs?
Does this process support, inform, or complement the work of your organization and strategic planning?

- What is our organizations mission, vision, and needs?
- In what ways does this process align with our mission? Vision?
- How does this process work with other processes or operations?
- Is this process considered in our strategic planning process?

3 (D) Deployment:

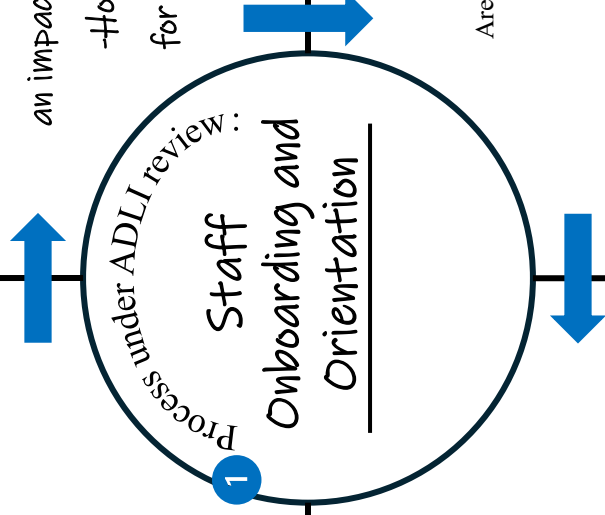
Is the process being used across all areas or departments that would be impacted or pertinent to?
Are there any areas or departments that should be using it but aren't?

- What areas of the organization does this process directly touch?
- Areas indirectly involved or impacted, what role do they play with supporting this process?
- Are there any areas noting involvement or experiencing an impact of this process that is unexpected?
- How are areas and departments held accountable for adhering to the process under review?

4 (L = E + I) Learning:

Is your approach evaluated and improved?
(Could it be done better, faster, or more accurately?)
How do you know your process is working as well as it could be?
Are your improvements/refinements shared throughout your organization?

- How is success or failure for this process measured?
- When was the process itself last evaluated?
- Is feedback, related to this process, collected? If so, how? If not, how can this be started?



2 (A) Approach:

Is there a clear process? (ie. Steps or consistent collection of activities that form actions that can be repeated and sustained systematically over time?)

-How long does it take to complete this process (ie. the cycle time)?

- Does this vary based on customer group?

-Are there steps that can be removed? Are there steps that need to be added?

-Are there specific data that is collected for different customer groups? Is this data quantitative / qualitative / both?

-How is this data used to inform healthcare services offered?

5 (I) Integration:

Does your process align with your organizations mission, vision, and needs?

Does this process support, inform, or complement the work of your organization and strategic planning?

-What are our organization's key customer groups?

- Does this process consider all segments of our customer groups and address their needs?

-How does this process work with other processes or operations?

-Is this process considered in our strategic planning process?

3 (D) Deployment:

Is the process being used across all areas or departments that would be impacted or pertinent to?

Are there any areas or departments that should be using it but aren't?

-What areas of the organization does this process directly touch?

-Areas indirectly involved or impacted, what role do they play with supporting this process?

-Are there any areas noting involvement or experiencing an impact of this process that is unexpected?

-How are the outputs of this process communicated throughout the organization?

4 (L = E + I) Learning:

Is your approach evaluated and improved?

(Could it be done better, faster, or more accurately?)

How do you know your process is working as well as it could be?

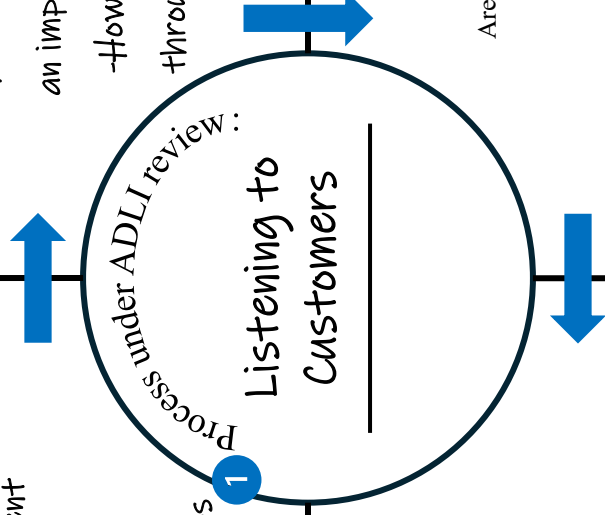
Are your improvements/refinements shared throughout your organization?

-How do measure success or failure of this process?

-When was the process itself last evaluated?

-Is feedback, related to this process, collected? If so, how? If not, how can this be started?

-Was there improvement made? If so, how was it shared internally or externally?



2 (A) Approach:

Is there a clear process? (ie. Steps or consistent collection of activities that form actions that can be repeated and sustained systematically over time?)

- Can you clearly describe the steps you engage in to develop your strategic plan from first step to implementation?
- How do you ensure that your strategy advances your organization's mission, vision and values?
- What is your timeframe for developing the plan up to implementation?
- How do you integrate customer engagement, new markets, and market share data?
- Who do you involve to be part of the planning team, and why? Who has final authority to adopt the plan?
- How do you ensure that you get input into the plan from all units within the organization?

5 (I) Integration:

Does your process align with your organizations mission, vision, and needs?

Does this process support, inform, or complement the work of your organization and strategic planning?

- What process ensures that, as it is continually revised and updated, your plan continues to advance your Mission, Vision, and Values and the organization toward its envisioned future (e.g., the impact measures)?
- How do you align your work systems and learning initiatives with your strategic plan, to reinforce organizational priorities?
- How do you incorporate external comparative performance data into your strategic plan and its goal-setting processes?

3 (D) Deployment:

Is the process being used across all areas or departments that would be impacted or pertinent to?

Are there any areas or departments that should be using it but aren't?

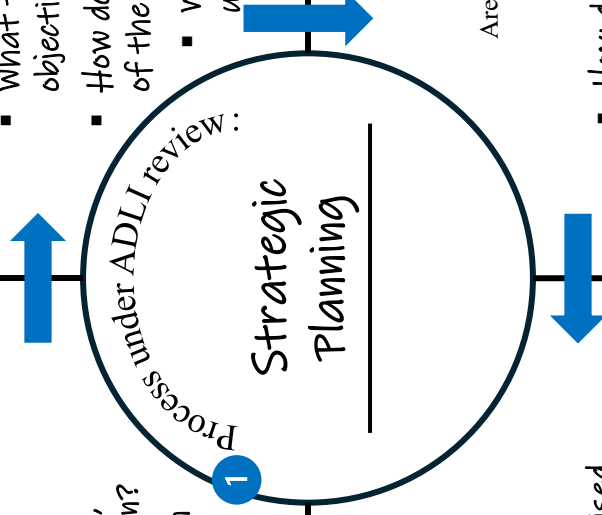
- What is the communication plan to engage all units once the plan is adopted? How do you segment the plan for deployment to each unit?
- How do you integrate vendors and contractors in carrying out the plan?
- What measures or indicators do you establish to show that units are making progress in their areas?
- What timelines do you set for progress on each strategic objective and action plan in the plan?
- How do you measure the intended impact implementation of the plan has (see integration questions)?
 - What is the timeframe for regular review and update of the plan from every unit?

4 (L = E + I) Learning:

Is your approach evaluated and improved?
(Could it be done better, faster, or more accurately?)

How do you know your process is working as well as it could be?
Are your improvements/refinements shared throughout your organization?

- How do you undertake regular cycles of evaluation and improvement in the strategic plan? What is the purpose of each cycle of learning?
- What is the timeframe for each cycle? Do these differ for different cycles of learning?
- How do you assess if an improvement in one part of the plan should be deployed across the entire plan? How do you communicate plan improvements to all units?
- How does your plan accommodate disruptions in your organization's market and operating landscape? How does your plan encourage and accelerate innovation?



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