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|  | **Steps of PDSA Approach** | **Key Elements** | **Notes** |
| **PLAN** | **Step 1**Getting Started | * Identify area, problem, or opportunity for improvement
* Estimate and commit needed resources
* Obtain approval (if needed) to conduct QI
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| **Step 2**Assemble the Team | * Identify and assemble team members (including customers and/or stakeholders)
* Discuss problem or opportunity for improvement
* Identify team member roles & responsibilities
* Establish initial timeline for improvement activity and schedule regular team meetings
* Develop Aim Statement
* *What are we trying to accomplish?*
* *How will we know that a change is an improvement?*
* *What change can we make that will result in improvement?*
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| **Step 3**Examine the Current Approach | * Examine the current approach or process flow
* Obtain existing baseline data, or create and execute data collection plan to understand the current approach
* Obtain input from customers and/or stakeholders
* Analyze and display baseline data
* Determine root cause(s) of problem
* Revise Aim Statement based on baseline data as needed
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| **Step 4**Identify Potential Solutions | * Identify all potential solutions to the problem based on the root cause(s)
* Review model or best practices to identify potential improvements
* Pick the best solution (the one most likely to accomplish your Aim Statement)
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| **Step 5**Develop an Improvement Theory | * Develop a theory for improvement
* *What is your prediction?*
* *Use an “If . . . . Then” approach*
* Develop a strategy to test the theory
* *What will be tested? How? When?*
* *Who needs to know about the test?*
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| **DO** | **Step 6**Test the Theory | * Carry out the test on a small scale
* Collect, chart, and display data to determine effectiveness of the test
* Document problems, unexpected observations, and unintended side effects
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| **STUDY** | **Step 7**Study the Results | * Determine if your test was successful:
* *Compare results against baseline data and the measures of success stated in the Aim Statement*
* *Did the results match the theory/prediction?*
* *Did you have unintended side effects?*
* *Is there an improvement?*
* *Do you need to test the improvement under other conditions?*
* Describe and report what you learned
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| **ACT** | **Step 8**Standardize the Improvement or Develop a New Theory | * If your improvement was successful on a small scale test it on a wider scale
* *Continue testing until an acceptable level of improvement is achieved*
* *Make plans to standardize the improvement*
* If your change was not an improvement, develop a new theory and test it; often several cycles are needed to produce the desired improvement
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| **Step 9**Establish Future Plans | * Celebrate your success
* Communicate your accomplishments to internal and external customers
* Take steps to preserve your gains and sustain your accomplishments
* Make long term plans for additional improvements
* Conduct iterative PDSA cycles, when needed
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