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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 |  |
| **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?* |  |
| **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 |  |
| **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) |  |
| **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?* |  |
| **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 |  |
| **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 |  |
| **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 |  |
| **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 |  |