



QI Project Tracking Sheet

Title:

Project Dates: / / through / /

| | Steps of PDSA Approach | Key Elements | Notes |
|----------------------------|--|---|-------|
| P L A N | Step 1 Getting Started | <input type="checkbox"/> Identify area, problem, or opportunity for improvement <input type="checkbox"/> Estimate and commit needed resources <input type="checkbox"/> Obtain approval (if needed) to conduct QI | |
| | Step 2 Assemble the Team | <input type="checkbox"/> Identify and assemble team members (including customers and/or stakeholders) <input type="checkbox"/> Discuss problem or opportunity for improvement <input type="checkbox"/> Identify team member roles & responsibilities <input type="checkbox"/> Establish initial timeline for improvement activity and schedule regular team meetings <input type="checkbox"/> Develop Aim Statement <ul style="list-style-type: none"> - <i>What are we trying to accomplish?</i> - <i>How will we know that a change is an improvement?</i> - <i>What change can we make that will result in improvement?</i> | |
| | Step 3 Examine the Current Approach | <input type="checkbox"/> Examine the current approach or process flow <input type="checkbox"/> Obtain existing baseline data, or create and execute data collection plan to understand the current approach <input type="checkbox"/> Obtain input from customers and/or stakeholders <input type="checkbox"/> Analyze and display baseline data <input type="checkbox"/> Determine root cause(s) of problem <input type="checkbox"/> Revise Aim Statement based on baseline data as needed | |
| | Step 4 Identify Potential Solutions | <input type="checkbox"/> Identify all potential solutions to the problem based on the root cause(s) <input type="checkbox"/> Review model or best practices to identify potential improvements <input type="checkbox"/> Pick the best solution (the one most likely to accomplish your Aim Statement) | |
| | Step 5 Develop an Improvement Theory | <input type="checkbox"/> Develop a theory for improvement <ul style="list-style-type: none"> - <i>What is your prediction?</i> - <i>Use an "If . . . Then" approach</i> <input type="checkbox"/> Develop a strategy to test the theory <ul style="list-style-type: none"> - <i>What will be tested? How? When?</i> - <i>Who needs to know about the test?</i> | |
| D O | Step 6 Test the Theory | <input type="checkbox"/> Carry out the test on a small scale <input type="checkbox"/> Collect, chart, and display data to determine effectiveness of the test | |



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| | | <input type="checkbox"/> Document problems, unexpected observations, and unintended side effects | |
| S T U D Y | Step 7 Study the Results | <input type="checkbox"/> Determine if your test was successful: <ul style="list-style-type: none"> - <i>Compare results against baseline data and the measures of success stated in the Aim Statement</i> - <i>Did the results match the theory/prediction?</i> - <i>Did you have unintended side effects?</i> - <i>Is there an improvement?</i> - <i>Do you need to test the improvement under other conditions?</i> <input type="checkbox"/> Describe and report what you learned | |
| | Step 8 Standardize the Improvement or Develop a New Theory | <input type="checkbox"/> If your improvement was successful on a small scale test it on a wider scale <ul style="list-style-type: none"> - <i>Continue testing until an acceptable level of improvement is achieved</i> - <i>Make plans to standardize the improvement</i> <input type="checkbox"/> If your change was not an improvement, develop a new theory and test it; often several cycles are needed to produce the desired improvement | |
| A C T | Step 9 Establish Future Plans | <input type="checkbox"/> Celebrate your success <input type="checkbox"/> Communicate your accomplishments to internal and external customers <input type="checkbox"/> Take steps to preserve your gains and sustain your accomplishments <input type="checkbox"/> Make long term plans for additional improvements <input type="checkbox"/> Conduct iterative PDSA cycles, when needed | |