

QM Spotlight

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QM Plan Quarterly Reports: The “C” & “A” in PDCA!

In a *successful* Plan-Do-Check-Act (PDCA) quality improvement (QI) cycle, CHECKING and ACTING happens ongoingly, throughout the year.

Why is the quarterly report an important part of the PDCA cycle?

It provides the team the opportunity to check:

- Current status of efforts
- Whether target objectives are likely to be met
- If actions need to be taken to address barriers

To prepare for the quarterly report, shortly after each quarter closes:

- Check the effect of improvement activities through data collection/analysis
- Summarize lessons learned and report your progress

ODP recommends developing and distributing QM Plan quarterly reports based on a fiscal year.



**Suggestion for a future
QM Spotlight?**

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your suggestion!

“Quarterly reports should be much simpler and to the point than I would have imagined!”

- recent QM Certification class attendee’s response to “*What did you learn?*”

When writing a quarterly report:

- More is not necessarily better. A lengthy report doesn’t always convey a better understanding. Reports should be short enough so that people will actually read them yet comprehensive enough to convey current status and next steps.
- Apply these critical thinking questions when reviewing and analyzing data -
Who? What? When? Where? WHY? How? How much?
- At the very least, your report should include:
 - ✓ Performance Measures (counts or percentages with numerators and denominators, as applicable)
 - ✓ Findings and analysis that describe your progress
 - ✓ Description of identified barriers encountered
 - ✓ Description of follow-up including how barriers to achieving your target objective will be addressed

Visualizations are also helpful to display your data findings, along with historical data, since they can show you where you have been, where you are now, and possibly where you are going!