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| **Plan-Do-Study-Act Record** | |  | **DATE:** |
| PDSA | **Change Idea to \_\_\_develop \_\_\_\_ test or \_\_\_\_ implement** | | |
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| **PLAN** | | | |
| Questions: What do we want to know? | | | |
|  | | | |
| Predictions: What do we think will happen? | | | |
|  | | | |
| Plan for Change or Test: who, what, when, where. What are we going to do to make our test happen? | | | |
| |  |  |  |  | | --- | --- | --- | --- | | List the tasks necessary to complete this test (what) | Person responsible | When | Where | | 1. |  |  |  | | 2. |  |  |  | | 3. |  |  |  | | 4. |  |  |  | | | | |
| Plan for Collection of Data: who, what, when, where. How will we compare predictions to actual? | | | |
|  | | | |
| **DO: carry out the change or test; collect data and begin analysis; describe the test** | | | |
|  | | | |
| **STUDY: complete analysis of data; summarize what was learned.** | | | |
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| **ACT: are we ready to make a change? Plan for the next cycle.** | | | |
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Use this checklist to coach or evaluate a PDSA cycle.

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| **QUESTIONS** | **NOTES & SUGGESTIONS** |
| **1. Plan**   * Was the objective for this PDSA cycle clear? If not, what would you suggest? * Did this cycle test an actual change in the way work is done? Or was it aimed at preparatory activity or assessment? * Was the test linked to a theory of improvement (Driver Diagram?) * Was this test part of a larger sequence of planned changes? * Were predictions clearly stated? * Was there a plan to collect the data to evaluate the test? Can predictions be evaluated using these data? * Is there a specific plan: WHO, WHAT, WHERE, WHEN? * Was the scale and scope of this PDSA appropriate? (Too large, small, complex, simple, et.?) How long will it take to complete the test? |  |
| **2. Do**   * Did the team actually test the change? * Did they document problems or unexpected events? * Did they collect the data they planned to collect? * Did they capture feedback or observations from those conducting the plan? * What are your suggestions to improve in the DO phase of their PDSA cycles? |  |
| **3. Study**   * Did they complete the analysis of the data? * Did they analyze feedback or observations? * Did they compare the data and feedback or observations to their prediction and summarize what they learned? * Did they update their theories about the objective of the cycle? * What are your suggestions? |  |
| **4. Act**   * Did they say what will happen in the next PDSA cycle (develop change further, test, implement?) * What are your suggestions for their next PDSA cycle(s)? (Ideas for subsequent tests? Scale, scope, sequencing?) |  |