



## QI TOOLS + RESOURCES

# PDSA WORKSHEET INSTRUCTIONS

A Plan-Do-Study-Act Worksheet is a valuable tool used to document key information related to each phase of your PDSA cycle including your objectives, predictions, data collection and analysis, observations, and next steps.

A Plan-Do-Study-Act Worksheet is divided into 4 sections with each section corresponding to one phase of your PDSA testing cycle.

The top section of the worksheet provides space for you to record information related to the change you are testing including the Change Idea, cycle number and date of the test. We refer to this section as the '**cycle information**' section of this PDSA worksheet.

Directly below the 'cycle information' section of this PDSA worksheet is the '**Plan**' section. In this section, you will identify the purpose of your testing cycle as either 'Develop', 'Test' or 'Implement.'

A PDSA cycle in the '**Develop**' stage is a testing cycle that involves a small number of staff and is used to gather feedback from individuals who will be implementing the change.

A PDSA cycle in the '**Test**' stage is a testing cycle with a small number of end users (clients, tenants or staff) and is used to determine if your Change Ideas is ready to be tested on a larger scale.

Finally, a PDSA cycle in the '**Implement**' stage is a Change Idea that you are confident is ready to be hardwired into your system. These Change Ideas have demonstrated their effectiveness in smaller tests and under a variety of different conditions.

Additional information you will record in this section includes;

- The objective of the testing cycle. In other words, what questions do you want to answer by conducting this test?
- Your predictions or hypothesis related to the outcome of the test
- How you will carry out the test, including specific tasks, individuals involved in conducting the test and their roles as well as where and when the test will take place
- Your PDSA data collection plan including the data you will be collecting during the test, how the data will be collected, individuals responsible for collecting the data, when the data will be collected and where the data will be recorded

Directly below the 'Plan' section of this worksheet is the 'Do' section. Here you will record your observations during the test, problems or unexpected issues you encountered, and successes related to the testing cycle.

The next section of the PDSA Worksheet is the '**Study**' section. Here you will record your data analyses and describe the results of the test, compare your predictions with what you observed and summarize what you learned during the testing cycle.

The final section of this worksheet is the '**Act**' section. In this section you will document next steps for your Change Idea by indicating whether the change requires modifications and further testing ('Adapt'), has failed to produce your desired outcomes and is being discarded at this point in your project ('Abandon'), or if the change is ready for implementation into your system, ('Adopt'). If you are adapting your Change Idea, any changes you would like to incorporate into the next testing cycle are also noted in this section.

**Note:** When testing your Change Ideas, be sure to involve the individuals most impacted by the change and have them evaluate how well a change is working within your system. Their input and feedback will help you plan future testing cycles and ensure the adoptability and sustainability of your Change Ideas once they are implemented into your system.



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# PDSA WORKSHEET

CHANGE IDEA:	CYCLE NUMBER:		DATE:	
<b>PLAN</b>				
WHAT IS THE PURPOSE OF THIS CYCLE? (Check one)	DEVELOP <input type="checkbox"/>	TEST <input type="checkbox"/>	IMPLEMENT <input type="checkbox"/>	
WHAT IS THE OBJECTIVE OF THIS CYCLE? WHAT QUESTIONS DO YOU WANT TO ANSWER? WHAT ARE YOUR PREDICTIONS?				
LIST TASKS NECESSARY TO SET UP AND CONDUCT THE TEST (THINK 'ONENESS' AND 'DROP TWO')				
What? (Specific task)	How? (Checklist, tally sheet)	Who? (Name or role)	When? (Times, dates - be specific)	Where? (Program, location site - be specific)
OUTLINE YOUR PDSA DATA COLLECTION PLAN (WHAT, HOW, WHO WHEN AND WHERE)				
What data will be collected?	How? (Checklist, tally sheet)	Who? (Name or role)	When? (Times, dates - be specific)	Where will the data be recorded?
<b>DO</b>				
WHAT DID YOU OBSERVE DURING THE TEST? WERE THERE ANY UNEXPECTED OBSERVATIONS OR ISSUES? WHAT WENT WELL?				
<b>STUDY</b>				
ANALYZE YOUR DATA AND DESCRIBE THE RESULTS. HOW DO THE RESULTS COMPARE WITH YOUR PREDICTIONS? WHAT DID YOU LEARN FROM THIS CYCLE?				
<b>ACT</b>				
WHAT CHANGES NEED TO BE MADE? WHAT IS YOUR PLAN FOR THE NEXT CYCLE?				
ADAPT (note changes for next cycle above)	<input type="checkbox"/>	ABANDON	<input type="checkbox"/>	ADOPT <input type="checkbox"/>