

# PDSA Cycle Planning

Team Name: \_\_\_\_\_



Use this form to plan and document a PDSA cycle. Page 2 offers criteria for evaluating your PDSA.

**Change:** \_\_\_\_\_ **Cycle #:** \_\_\_\_\_

Objective of this test:

Questions to be answered:

**1. Plan**

Briefly describe the change you plan to test:

**PREDICTION:** What do you think will happen (predict answers to each of your questions)?

What data will you need to collect in order evaluate the change? Who will collect it?

<i>Task(s) to be completed for test</i>	<i>Person responsible</i>	<i>When?</i>	<i>Where &amp; how?</i>

**2. Do**

What problems or unexpected events did you encounter?

Feedback and observations from the participants:

Answers to your questions:

**3. Study**

What do the data show?

Was your prediction confirmed? *If not what did you learn?*

**4. Act**

Following this test, will you  Adopt (implement)  Adapt (refine & retest)  Abandon this change?

What is your plan for the next cycle?

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Use this checklist to coach or evaluate a PDSA cycle.

QUESTIONS	NOTES & SUGGESTIONS
<p><b>1. Plan</b></p> <ul style="list-style-type: none"> <li>• Was the objective for this PDSA cycle clear? If not, what would you suggest?</li> <li>• Did this cycle test an actual change in the way work is done? Or was it aimed at preparatory activity or assessment?</li> <li>• Was the test linked to a theory of improvement</li> <li>• Was this test part of a larger sequence of planned changes?</li> <li>• Were predictions clearly stated?</li> <li>• Was there a plan to collect the data to evaluate the test? Can predictions be evaluated using these data?</li> <li>• Is there a specific plan: WHO, WHAT, WHERE, WHEN?</li> <li>• Was the scale and scope of this PDSA appropriate? (Too large, small, complex, simple, etc.?) How long will it take to complete the test?</li> </ul>	
<p><b>2. Do</b></p> <ul style="list-style-type: none"> <li>• Did the team actually test the change?</li> <li>• Did they document problems or unexpected events?</li> <li>• Did they collect the data they planned to collect?</li> <li>• Did they capture feedback or observations from those conducting the plan?</li> <li>• What are your suggestions to improve in the DO phase of their PDSA cycles?</li> </ul>	
<p><b>3. Study</b></p> <ul style="list-style-type: none"> <li>• Did they complete the analysis of the data?</li> <li>• Did they analyze feedback or observations?</li> <li>• Did they compare the data and feedback or observations to their prediction and summarize what they learned?</li> <li>• Did they update their theories about the objective of the cycle?</li> <li>• What are your suggestions?</li> </ul>	
<p><b>3. Act</b></p> <ul style="list-style-type: none"> <li>• Did they say what will happen in the next PDSA cycle (develop change further, test, implement?)</li> <li>• What are your suggestions for their next PDSA cycle(s)? (Ideas for subsequent tests? Scale, scope, sequencing?)</li> </ul>	