

## Plan-Do-Study-Act (PDSA) Planning Tool Instructions

The Plan-Do-Study-Act Planning Tool is intended to help you think through the important details of a PDSA cycle. The tool should be used in preparation for testing a change and revisited once the test is completed to document what your team's next steps will be (i.e., change and repeat the test, scale up and repeat the test, adopt the change, or abandon the change).

In this tool you'll find separate worksheets for each cycle of your ramp. When beginning your first cycle, use the 'Cycle 1' tab. After the first cycle your team decides to adapt or scale up the change and test again, use the 'Cycle 2' tab to document the second cycle. Continue this process until your team decides to either abandon or adopt the change. When starting a new change, use a new workbook.

Below is a sample planning tool with guidance (in *italics*) provided in each of the fields. Please contact your TEI if you have any questions about using the planning tool.

### **PDSA Planning Tool: Cycle 1**

Grantee name:	Topic:
Change: <i>Explain the change your team is testing. Be specific.</i>	What are you trying to accomplish with this change? <i>What is the goal of this PDSA cycle?</i>
Improvement Theory (if/then statement): <i>State the change you are testing and the intended goal of the change. For example, "If we...provide families with appropriate and culturally-relevant books; Then...it will result in...families reading to their children in between h</i>	
<b>PLAN</b>	
What will take place? <i>What is the specific change?</i>	
Who will test the change? <i>Which staff?</i>	Who will the change be tested with? <i>E.g. staff, caregivers, children, referral sources, etc</i>
Start and end date?	Where will the test occur? <i>E.g. in the office, the family's home, etc.</i>
What are the tasks/resources needed to support the change? <i>E.g. activity sheet, books, tracking form, etc.</i>	

What data will be collected?  
*What data do you need to collect to determine whether the change tested has an impact? E.g. Quantitative: % of children read to their child(ren) every day, number of books read, % of program capacity filled; Qualitative: What did you learn from the early language and literacy training you attended? How do you describe your home visiting program to families?*

<p>Who will collect the data and who are the subjects?  <i>E.g. supervisors, home visitors, primary caregivers, referral sources, etc.</i></p>	<p>Start and end date of data collection?</p>
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<p>Where will data be collected and stored?  <i>What form/ tracking document, etc. will staff use to collect the data? And where will the data be stored (e.g. tracking document in Excel, data system, etc.)?</i></p>	<p>What tools are needed to support data collection?</p>
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**STUDY**

What did the data tell you? What did you learn?

**ACT**

What is your next step? (select from the dropdown)

Adapt the change & test again:  
*If the change showed potential for improvement but you were not sure of the best ways in which you could improve the change, you may choose to modify the change and test it again.*

Scale up the change & test again:  
*If the change worked well on a small scale (e.g., 1 family, etc.), you may choose to test the change at a larger scale or under different circumstances (e.g. another home visitor, different time of the week/ month, etc.) to see if you get the same result.*

Adopt the change for your program:  
*If the change worked well and you saw the intended results, you may choose to adopt the change as a normal program. Note: You should not 'adopt' a change unless you have tested it under various circumstances and continue to see the same result.*

Abandon the change & test a new change:  
*If the change was not a good fit for your program, you may choose to abandon it all together and choose a completely different change to test.*

If you select **adapt or scale up and test again** - use the next tab in this workbook to document your ne  
If you select **adopt or abandon** - start a new workbook to plan for and document your next test of cf

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**PDSA Planning Tool: Cycle 1**

Grantee name:	Topic:
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Change:	What are you trying to accomplish with this change?
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Improvement Theory (if/then statement):

**PLAN**

What will take place?

Who will test the change?	Who will the change be tested with?
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Start and end date?	Where will the test occur?
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What are the tasks/resources needed to support the change?

What data will be collected?

Who will collect the data and who are the subjects?	Start and end date of data collection?
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Where will data be collected and stored?	Who tools are needed to support data collection?
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**STUDY**

What did the data tell you? What did you learn?

**ACT**

What is your next step? (select from the dropdown)

If you select **adapt or scale up and test again** - use the next tab in this workbook to document yo  
If you select **adopt or abandon** - start a new workbook to plan for and document your next tes



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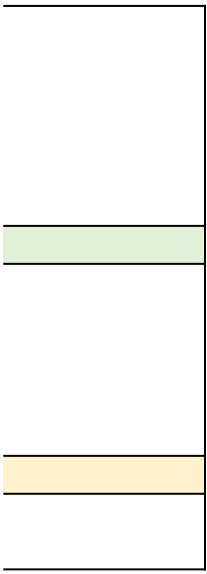
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## PDSA Planning Tool: Cycle 2

### PLAN

What are you trying to accomplish in this cycle?

How will this cycle be different than cycle 1? (e.g., who it's being tested with)

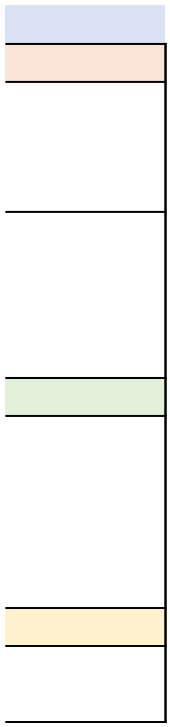
### STUDY

What did the data tell you? What did you learn?

### ACT

What is your next step? (select from the dropdown)

If you select **adapt or scale up and test again** - use the next tab in this workbook to document your  
If you select **adopt or abandon** - start a new workbook to plan for and document your next test of



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### **PDSA Planning Tool: Cycle 3**

#### **PLAN**

What are you trying to accomplish in this cycle?

How will this cycle be different than cycle 2? (e.g., who it's being tested with)

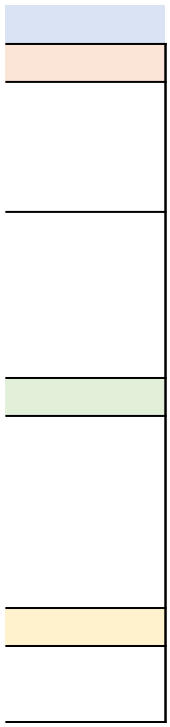
#### **STUDY**

What did the data tell you? What did you learn?

#### **ACT**

What is your next step? (select from the dropdown)

If you select **adapt or scale up and test again** - use the next tab in this workbook to document your  
If you select **adopt or abandon** - start a new workbook to plan for and document your next test of



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## PDSA Planning Tool: Cycle 4

### PLAN

What are you trying to accomplish in this cycle?

How will this cycle be different than cycle 3? (e.g., who it's being tested with)

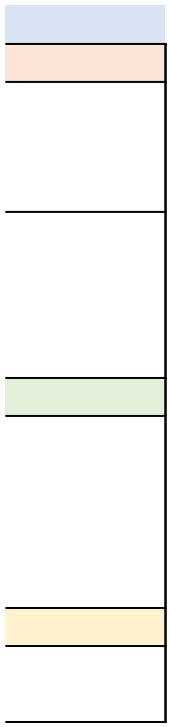
### STUDY

What did the data tell you? What did you learn?

### ACT

What is your next step? (select from the dropdown)

If you select **adapt or scale up and test again** - use the next tab in this workbook to document your  
If you select **adopt or abandon** - start a new workbook to plan for and document your next test of



next cycle!  
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## PDSA Planning Tool: Cycle 5

### PLAN

What are you trying to accomplish in this cycle?

How will this cycle be different than cycle 4? (e.g., who it's being tested with)

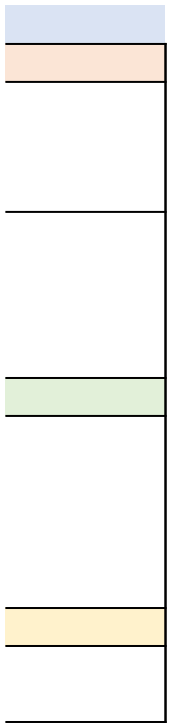
### STUDY

What did the data tell you? What did you learn?

### ACT

What is your next step? (select from the dropdown)

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If you select **adopt or abandon** - start a new workbook to plan for and document your next test of



next cycle!  
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## PDSA Planning Tool: Cycle 6

### PLAN

What are you trying to accomplish in this cycle?

How will this cycle be different than cycle 5? (e.g., who it's being tested with)

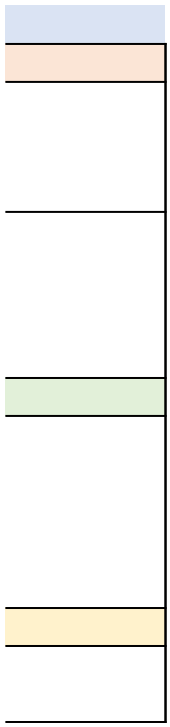
### STUDY

What did the data tell you? What did you learn?

### ACT

What is your next step? (select from the dropdown)

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If you select **adopt or abandon** - start a new workbook to plan for and document your next test of



next cycle!  
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## PDSA Planning Tool: Cycle 7

### PLAN

What are you trying to accomplish in this cycle?

How will this cycle be different than cycle 6? (e.g., who it's being tested with)

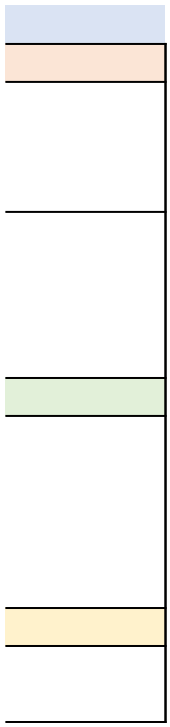
### STUDY

What did the data tell you? What did you learn?

### ACT

What is your next step? (select from the dropdown)

If you select **adapt or scale up and test again** - use the next tab in this workbook to document your  
If you select **adopt or abandon** - start a new workbook to plan for and document your next test of



next cycle!  
f change!

Adapt the change & test again  
Scale up the change & test again  
Adopt the change for your program  
Abandon the change