



# 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 was learned and what your team’s next steps will be (i.e., repeat the test, add the change to your program’s process, abandon the change).

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

<b>Grantee Name:</b>	<b>Collaborative Topic:</b> <i>Either Early Language &amp; Literacy or Family Engagement</i>	<b>Date:</b> Click or tap to enter a date.
<b>Primary Driver:</b> <i>Identify which primary driver your team is focusing on in this PDSA cycle (include number associated with primary driver, too).</i>	<b>Secondary Driver:</b> <i>Identify which secondary driver your team is focusing on in this PDSA cycle (include number associated with secondary driver, too).</i>	
<b>Change and change number (if applicable):</b> <i>Using the Change Package, identify the change you are testing (include number associated with change, too). If your team is testing a change that is not included in the Change Package, please put N/A here.</i>	<b>Cycle number:</b> <i>When testing a single change, it’s likely that you will conduct multiple PDSA cycles. For example, you may first test it with 1 home visitor, and then do a second cycle with all of the home visitors. Please identify which cycle you’re referring to in this tool. For example, the second cycle with all of the home visitors would be 2.</i>	
<b>What are you trying to accomplish with this PDSA cycle?</b> <i>What is the goal of this PDSA cycle?</i>		
<b>Improvement Theory (If/then Statement):</b>		
<b>If we...</b> <i>State the change you are testing (If it is a change from the Change Package, you can pull the change language from the item above). For example, “If we...provide families with age-appropriate and culturally-relevant books”</i>		
<b>Then...</b> <i>State the intended goal of the change (e.g. what you are trying to accomplish with this PDSA cycle). For example, “It will result in...families reading to their children in between home visits”</i>		

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## **PLAN Stage**

### ***Plan for Test:***

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**What will take place?**

*What is the specific change?*

**Who will test the change?**

*Which staff?*

**Who will the change be tested with?**

*E.g. staff, caregivers, children, referral sources, etc.*

**Start and end date (Month/Day/Year) of test? Click or tap to enter a date. to Click or tap to enter a date.**

**Where will this test occur?**

*E.g. in the office, the family's home, etc.*

**What are the tasks/resources needed to support the change?**

*E.g. activity sheet, books, tracking form, etc.*

### ***Plan for Data Collection:***

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**What quantitative (% or count) or qualitative (question(s) asked) data will be collected?**

*What data do you need to collect to determine whether the change tested has an impact? E.g. Quantitative: % of families who 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?*

**Who will collect the data and who are the subjects?**

*E.g. supervisors, home visitors, primary caregivers, referral sources, etc.*

**Start and end date of data collection? Click or tap to enter a date. to Click or tap to enter a date.**

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**Where will data be collected and stored?**

*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.)?*

**What tools are needed to support data collection (e.g., form, Excel file for tracking data, etc.)?**

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**DO Stage**

**Was the test carried out as planned?**  **Yes**     **No**    *Check either 'yes' or 'no'.*

**If no, why not and what happened?**

*What happened during the Do stage that impacted how the test was carried out?*

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**STUDY Stage**

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

**Did your results match your prediction?**

*Did your results match your Improvement Theory (If/ Then Statement)?*

**What surprised you?**

## **ACT Stage**

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*Please check the box that applies:*

- Adapt the change & test again** - *If the change showed potential for improvement but you found 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 home visitor, 1 family, etc.), you may choose to test the change again under different circumstances (e.g. another home visitor/family, at a different time of the week/ month, etc.) to see if you get a similar result.*
- Adopt the change for your program** - *If the change worked well and you saw the intended outcome, you may choose to adopt the change as a normal procedure for your program. Note: You should not 'adopt' a change until you have tested it under various circumstances and continued to get the same result.*
- Abandon the change & test a new change** - *If the change was not a good fit for your program, you may select to abandon it all together and choose a completely different change to test.*

### **Please explain your next steps:**

*Briefly describe what your next steps will be based on how you decided to act on the change tested.*

**Did you team develop any resources to support this PDSA cycle?**  **Yes**       **No**    *Check either 'yes' or 'no'.*

**If yes, what did your team develop?** *(Please attach the resource(s) developed when sharing this PDSA Planning Tool with your TEI TA Provider. The resource(s) may be shared with the collaborative to support other grantees improvement efforts.)*

*Please share what your team developed in this space (brief description) and attach the resource(s).*

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