

## **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 tested and 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 15 and 30 minutes per day."</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: % read to their child(ren) every day, number of books read, % of program capacity filled; Qualitative: What did you learn about 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?

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?

**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 didn't work as well as you hoped, 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 in 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 part of your program. Note: You should not 'adopt' a change until 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 ch

PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13):  
The purpose of this information collection is to inform program support and technical assistance related to Continuous Quality Improvement for Tribal Home Visiting grantees. Public reporting burden for this collection of information is estimated to 1 hour per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This is a voluntary collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0531 and the expiration date is XXX/XX/XXXX. If you have any comments on this collection of information, please contact Julie Morales; morales@jbassoc.com

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**PDSA Planning Tool: Cycle 1**

Grantee name:	Topic:
Change:	What are you trying to accomplish with this change?
Improvement Theory (if/then statement):	
<b>PLAN</b>	
What will take place?	
Who will test the change?	Who will the change be tested with?
Start and end date?	Where will the test occur?
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?

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**

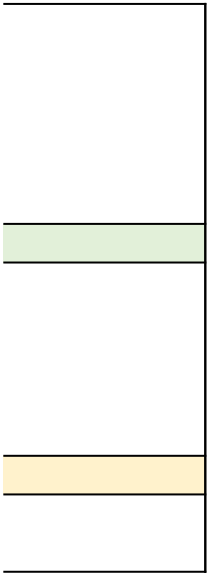
What is your next step? (select from the dropdown)

If you select **adapt or scale up and test again** - use the next tab in this workbook to document yo  
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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)

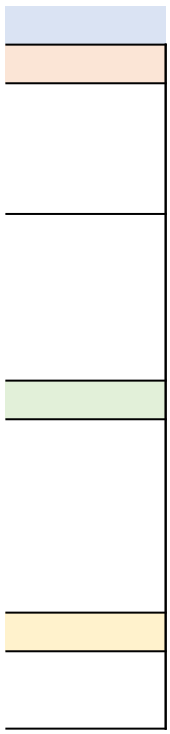
### STUDY

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



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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)

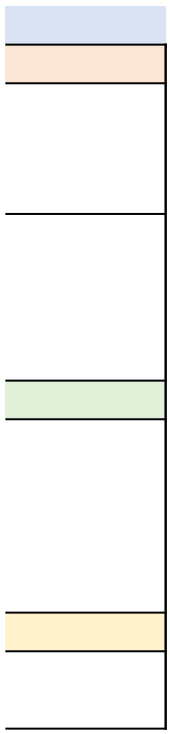
### STUDY

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

### ACT

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

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## 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)

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