



Plan Do Study Act Checklist Tool

Description

WHAT IS THIS TOOL?

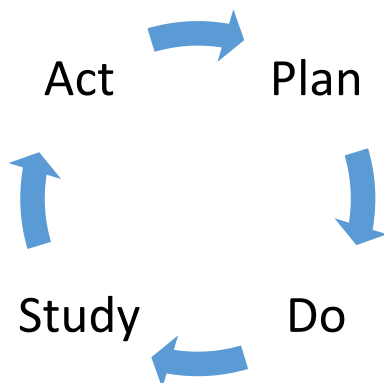
This tool is a worksheet to check the quality of a Plan Do Study Act (PDSA) cycle. It provides a checklist and prompts to users to ensure they are attending to best practices for conducting a PDSA.

HOW TO USE IT

This tool can be used as a job aid or conversation starter to discuss with LIAs and/or CITs how to plan a quality PDSA and ensure they are getting the best results possible. Or it can be used by LIAs independently to ensure they are using PDSA best practices.

CONSIDERATIONS

For users that are not familiar with a PDSA cycle an Implementation Specialist may want to consider supporting them through planning and conducting a PDSA cycle. Also, as a prerequisite to conducting PDSA cycles the Implementation Specialist may want to provide some adult learning using the [National Institute for Children's Health Quality \(NICHQ\) Quality Improvement 101](#) and/or [Blended Implementation Science and CQI approach slides](#)



These questions were adapted from Associates in Process Improvement's PDSA Cycle Long Form and the Institute for Healthcare Improvement's Improvement Advisor Development Program PDSA Feedback Form.

Citation: Lawrence, S. (2022, March). ICTP Plan-Do-Study-Act Cycle Checklist. [Learning Resource for the ICTP projects]. Chapel Hill, NC: The Impact Center at Frank Porter Graham Child Development Institute, University of North Carolina at Chapel Hill.

PDSA Checklist



PLAN

- The objective for this PDSA cycle is clear to you.**

If not, what would you suggest?

Tip: Clearly state what capacity bucket and/or implementation goal this PDSA relates to. This helps you link this test to a theory of change, or strategic plan for why the change will lead to its intended outcomes.

- The learning questions to be answered are stated clearly and relate to the objective of the PDSA cycle.**

Tip: All PDSA cycles are learning cycles and need to have learning questions that the cycle attempts to answer. The questions help lead to the data collection plan and predictions a team makes.

- Predictions for the learning questions to be answered are clearly stated.**

How could the predictions be improved?

Tip: Make sure you have a prediction for each of the learning questions you want to answer with this cycle. Numeric predictions maximize learning and help teams understand the magnitude of change the test may bring about. Begin to think about under what conditions the predictions for this cycle might be different.

- Someone not involved in the planning could carry out the PDSA cycle given the details described in the Plan (WHO, WHAT, WHERE, WHEN).**

If not, what would you suggest to strengthen this part of the plan?

Tip: Being extremely detailed in planning maximizes the likelihood of successfully executing and learning from the test. Name specific people on the team and dates when things will happen. These details also help to keep a running log of the work that was done.

- The plan for data collection will enable the team to answer the questions they have and evaluate their predictions.**

What other data might be needed to maximize learning and take action?

Tip: The goal for data collection is to capture “just enough” information to know what’s good and what isn’t good and then modify the change over time and get better with sequential tests. Collect useful (not

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perfect) data that allows you to know if your test has merit to bring about improvement. Paper and pencil data collection and qualitative feedback often provide valuable learning.

There is a way to capture feedback or observations from those conducting the PDSA.

Tip: Qualitative feedback is extremely important to learning. Asking those involved in the PDSA cycle how the test went helps to document any unanticipated problems and/or assumptions that were made. It can also increase buy-in.

Responsibility for collecting and analyzing data was assigned.

Tip: Help lessen the administrative burden of data collection by detailing who and how data will be collected and providing any data collection tools. This helps the person responsible for data collection understand exactly what they need to do.

DO

- The team collected the data they planned to collect**
- Challenges with data collection were documented**
- Feedback or observations from those conducting the plan were documented**

What improvements would you suggest?

STUDY

- Data and feedback or observations were compared to the predictions**
- Learning was summarized**
- The theory about the objective of the cycle was updated**

What improvements would you suggest?

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ACT

- Plan for next PDSA cycle is documented**
- Plan for next PDSA cycle is based on learning**

What improvements would you suggest?