



**Plan-Do-Study-Act
Planning Worksheet**

School/SBHC Team Name: _____

PDSA Cycle/Focus _____ Date _____

OVERALL PLAN:

List your main goal or aim for one of your priority areas.

Objective for *this* cycle:

Select from your improvement plan.

Questions you may consider to help you achieve this objective:

Here is where you reference and discuss what you and your team need to consider before moving forward. Think about any barriers or challenges you foresee and how to address them.

Theory of change (Brainstorm - by doing "X" will we achieve our objective?):

How or what do you predict will help achieve the objective?
How are you framing the strategies you plan to use?

PLAN (for change):

This is where you break down a larger objective.

Plan the test or observation, including a plan for collecting data.

- Make predictions about what will happen and why.
- Develop a plan to test the change. (Who? What? When? Where? How?)

What	Who	By When

How will we demonstrate the effectiveness of our actions:

- What data needs to be collected?
- What are your metrics or measurements?
- Who is responsible for data collection?

DO:

Try out the proposed activities or strategies on a small scale.

- *Collect information and data.*
- *Document observations, problems encountered, and special circumstances.*
- *Begin preliminary analysis of the data.*

STUDY:

Analyze effectiveness of plan and summarize lessons learned.

- *Complete the analysis of the data.*
- *Compare what was originally predicted.*
- *Summarize and reflect on what was learned.*

ACT:

Plan for the next cycle → How shall we modify our existing plan, or shall we start a new one?

- *Based on lessons learned, where do we go from here?*
- *Do we need to modify our strategies or approaches to change?*
- *What should the next PDSA cycle focus on?*

PLAN-DO-STUDY-ACT Cycles

Every goal or aim requires a series of smaller steps to facilitate improvement or change. Plan-Do-Study-Act, or PDSA, is a recurring method for rapid improvement process designed to maintain changes over time. It can focus on changing current practices or behaviors, or trying new things.

PDSA cycles typically take place after a broader improvement plan has been developed. A designed plan for improvement helps determine the subsequent steps for generating change. PDSA cycles are the actions that test proposed strategies or activities to achieve objectives and reach desired goals and outcomes. Some cycles are more complex and take longer to complete, while others are simpler and finish faster. In short, the PDSA rapidly tests a proposed change on a small scale, allows observations to be made, analyzes results and findings, and helps to decide how to move on to the next series of steps, or try these methods on a broader level.

Adapted from the Institute for Healthcare Improvement's Worksheet for Testing Change.