

PDSA Worksheet for Testing Change

The **Plan-Do-Study-Act (PDSA) worksheet** is a useful tool for documenting a test of change. The PDSA cycle is shorthand for testing a change by

- developing a plan to test the change (**Plan**),
- carrying out the test (**Do**),
- observing and learning from the consequences (**Study**) and
- determining what modifications should be made to the test (**Act**).

Directions

Use the PDSA worksheet to help your team document a test for change. Fill out one worksheet for each test you conduct. Your team will test several different changes, and each change will go through several PDSA cycles. Keep a file, either electronic or hard copy, of all your PDSA worksheets for all the changes your team tests.

Step 1: Respond to the Three Fundamental Questions for Improvement.

1. What are we trying to accomplish (aim)?
2. How will we know the change is an improvement (measure)?
3. What change can we make that will result in an improvement (ideas, hunches, theories)?

Step 2: Fill in your plan.

- What is your hunch that you would like to test?
- What do you expect will happen?
- Who will be involved (e.g., one resident, one unit, one floor, one department)?
- How long will the change take to implement?

Step 3: Do.

- Implement the change. Try out the test on a small scale.
- Document any problems and unexpected observations.

Step 4: Study.

- Set aside time to study your results and determine if the change resulted in the expected outcome.
- Reflect on what happened and what was learned.
- Look for unintended consequences, surprises, successes or failures.

Step 5: Act.

- Adopt – If your test was successful, consider expanding the changes to additional residents, staffs, units, etc.
- Adapt – If your test was moderately successful but did not produce the desired results, refine the changes based on what was learned from the test and do another round of PDSA.
- Abandon – If the results were not what you wanted and you feel you have tried every change possible, abandon this test and consider a new approach.



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Achieving our goal will require multiple small tests of change to reach an efficient process and our desired results.

Date: _____

Cycle: _____

Change Champion: _____

Three Fundamental Questions for Improvement

1. What are we trying to accomplish (aim or long-range goal)?
2. How will we know a change is an improvement, i.e., how will we measure the test?
3. What changes can we make that will lead to improvement?

PLAN (short-range goal)		
We plan to (include anticipated date of completion):		
We hope this produces:		
Steps to execute the plan:	Assigned to:	Date to be completed:
DO		
What happened when we ran the test? What did we observe?		
STUDY		
What did we learn/conclude from this cycle? Why was/was not the test successful?		
ACT		Date:
What are our next steps?		
☐ We will adopt this test and _____.		
☐ We will adapt this test and repeat PDSA for another cycle.		
☐ We will abandon this test and start a new PDSA.		