

PURPOSE: To provide helpful feedback to those presenting PDSA cycles designed to develop, test or implement a change

Project Description:

Note: File name reflects the cycle # and date

PLAN:

- One objective for this PDSA cycle checked
- Short description or the cycle stated
- Cycle number reflects link to other related cycles. (ie. For the same test on larger scale, linked cycles would be numbered 2a, 2b, 2c, etc.)

Learning Questions (Copied from Ami™ Charter)

- There are NO questions which can be answered with Yes or No.
- There are NO questions which identify issues which must be considered when conducting the test. (resistance, limitations, etc. : These questions should be listed under Planning the Test as issues to to consider when designing the test on the PDSA document.)
- There are NO questions which relate to design of the test. (who, what, where, when: These will be answered during the PLAN of the test on the PDSA document.)
- Questions relate DIRECTLY to the goals and measures. (If we make this change, what goals and measures will be impacted?)
- Questions include: Why do we believe this?
- No obvious missing questions (goals or measures)
- At a minimum, questions match the Ami™ Charter (PDSA's). Other useful questions can be added.

Suggested improvements to existing questions/Additional questions to consider:

- Predictions are specific, not general
- Predictions include **why** team members believe these predictions (personal experience, knowledge from data, what they have been told which frames their opinion.)

Suggestions:

TEST PLAN

- Issues or questions which must be answered in order to run the test are listed.
- WHO, WHAT, WHERE, WHEN and HOW the test will be conducted is defined.
- Plan includes training people involved on what we are trying to learn from the test, what the change is, how long the test will take, and practice for those making the change.
- Other processes which might be affected by the change have been considered
- Size of the test is appropriate (ie. Start small test one or two people, one location to start or incremental in size due to prior PDSA test and learning)
- Wide range of conditions has been defined ie: small test may be with new & experienced person; larger test may be in two different situations (types of patients, locations, etc.)
- Time for the test is short and temporary
- Data is being collected before, during and after the test (creates the baseline)
- Appropriate number of data points (ie. 12 before/12 during/a few after) for the type of data being collected (continuous data – 6 trials each by new and experienced, may use the same data; attribute – sample size appropriate for each data point.)
- Task assignments are complete

Suggestions:

PLAN (continued)

DATA COLLECTION PLAN

- Data plan answers all learning questions related to the test
- WHO, WHAT, WHERE, WHEN and HOW the data will be collected is defined.
- Method to “pretest” the data collection form with non-team member for clarity is part of the plan
- Plan includes training people involved on what we are trying to learn, why the all information on the form is needed, what the form categories mean, and practice on how to use the data collection forms.
- Observers of the test have been included with observation data collection method defined
- Data collection forms (surveys/spreadsheets) are inserted into the PDSA.
- Useful type of visual format for learning has been selected (Pareto, control chart, run chart, etc.)
- Task assignments are complete
- PDSA seems reasonable in size, not too large
- Time to test is as short as possible. (Remember it can always be lengthened if it works)

Suggestions:

DO:

- Plan was attempted.
- Problems or unexpected events were documented.
- Observations and Data were documented.
- Modifications to questions, data collection plan or the test were documented. Predictions were made if additional questions were made prior to the execution of the plan.
- Analysis of the data was completed before the team meeting.
- Analysis of the data included observations.
- If test is lengthened, it is noted here and annotated back in the test plan.

Suggestions:

STUDY:

- Questions, predictions and what was learned is complete. Results include an update of their theories including what was learned.
- Other conditions which might have different results has been identified
- Visual graphic analysis was inserted next to the appropriate Learning Questions
- New issues, including those from observations were summarized and identified as part of the project or outside the project boundaries.
- A short summary of all that was learned was included

Suggestions:

ACT:

- New issues have been addressed. If any are outside the boundaries of the project, each is summarized & given to the Sponsor for prioritization and action outside the team (or boundaries revised to include.)
- Actions will be taken as a result of this cycle – adopt, modify or abandon the change
- New questions or tests are grouped as cycles and prioritized and assigned for future action.

Suggestions: