# Logo, company name Description automatically generatedPDSA ↔ SDSA Worksheet

**Aim:** This worksheet can be used to plan and keep track of improvement efforts. track of improvement efforts.

*USE THIS WORKSHEET BY PRINTING IT OR BY TYPING INTO THE GREY BOXES.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Group:** |  | **Start Date:** |  |
| **Team Members** | | | |
| 1. **Leader:** |  | **5.** |  |
| 1. **Facilitator:** |  | **6.** |  |
| 1. **Timekeeper:** |  | **7.** |  |
| 1. **Recorder:** |  | **8.** |  |
|  | | | |
| **Coach:** |  | **Meeting Day/Time:** |  |
| **Data Support:** |  | **Place:** |  |

**“30,000-foot view” Questions**

Aim: What are we trying to accomplish?

*click or tap here to enter text*

Measures: How will we know that a change is an improvement?

*click or tap here to enter text*

Current Process: What is the process for giving care to this type of patient?

*click or tap here to enter text*

**Specific Questions**

Plan: How will we **plan** the pilot? Who does what and when? With what tools or training? Which baseline data will be collected? How will we know if a change is an improvement?

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| **Tasks to be completed to run test of change** | **Who** | **When** | **Tools/Training Needed** | **Measures** |
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Do:What are we learning as we **do** the pilot? What happened when we ran the test?Any problems encountered? Any surprises?

*click or tap here to enter text*

Study: As we study what happened, what have we learned? What do the measures show?

*click or tap here to enter text*

Act: As we act to hold the gains or abandon our pilot efforts, what needs to be done? Will we modify the change? Make plan for the next cycle of change.

*click or tap here to enter text*

Standardize: Once you have determined this PDSA result to be the current “best practice” take action to Standardize-Do-Study-Act (SDSA).You will create the conditions to ensure this “best practice” in daily activities until a new change is identified and then the SDSA moves back to the PDSA cycle to test the idea to then standardize again.

*click or tap here to enter text*

Tradeoffs: What are you **NOT** going to do anymore to support this new habit?

*click or tap here to enter text*

*What has helped you in the past to change behavior and help you do the “right thing?”*

*click or tap here to enter text*

*What type of environment has supported standardization?*

*click or tap here to enter text*

*How do you design the new “best practice” to be the default step in the process?*

*click or tap here to enter text*

*Consider professional behaviors, attitudes, values and assumptions when designing how to embed this new “best practice.*

*click or tap here to enter text*

Measures: How will we know that this process continues to be an improvement?

*click or tap here to enter text*

*What measures will inform us if “standardization” is in practice?*

*click or tap here to enter text*

*How will we know if “old behaviors” have appeared again?*

*click or tap here to enter text*

*How will we measure? How often? Who?*

*click or tap here to enter text*

Possible Changes: Are there identified needs for change or new information or “tested” best practice to test? What is the change idea? Who will oversee the new PDSA? Go to PDSA worksheet.

*click or tap here to enter text*

Standardize: How shall we **standardize** the process and embed it into daily practice? Who? Does what? When? With what tools? What needs to be “unlearned” to allow this new habit? What data will inform us if this is being standardized daily?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tasks to be completed to “embed” standardization and monitor process to run test of change** | **Who** | **When** | **Tools/Training Needed** | **Measures** |
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\*Playbook- Create standard process map to be inserted in your Playbook.

Do: What are we learning as we **do** the standardization? Any problems encountered? Any surprises? Any new insights to lead to another PDSA cycle?

*click or tap here to enter text*

Study: As we **study** the standardization, what have we learned? What do the measures show? Are there identified needs for change or new information or “tested” best practice to adapt?

*click or tap here to enter text*

Act: As we **act** to hold the gains or modify the standardization efforts, what needs to be done? Will we modify the standardization? What is the change idea? Who will oversee the new PDSA? Design new PDSA cycle. Make PLAN for the next cycle of change. Go to PDSA worksheet.

*click or tap here to enter text*

*The “PDSA Worksheet” is based on the work of Tom Nolan, PhD, Paul Batalden, MD, and Eugene Nelson DSc. 8/93, 2005, Trustees of Dartmouth College, M. Godfrey, G. Nelson, P. Campion, © 2020 Godfrey Group*