

Step 1

Guide for Planning a PDSA/Small Test of Change

Along with your Driver Diagram, also consider the information below while planning for your PDSA/ Small Test of Change. Remember that the Plan phase of the PDSA cycle helps in creating a “roadmap” for implementation as well as identifying the data needed to evaluate whether the change was an improvement or not.

- Plan the test or observation, including a plan for collecting data.
- State the objective of the test.
- Make predictions about what will happen and why.
- Develop a plan to test the change. (Who? What? When? Where?)
- What data need to be collected?

Step 2

Different Types of Data Video and Discussion

1. Asynchronously watch the linked video to learn the difference between outcome, process and balance data.
[Determine Data to Collect](#)
2. Discuss the different types of data.

Outcome: data on the intermediate outcomes related to the primary and secondary drivers and change practices. These measures are collected to track improvement that has resulted from implementation of the change practices from the baseline.

Process: data on whether the steps associated with implementing the change practice took place as intended.

Balance: data on the unintended consequences and the costs of the change practice. This information is collected to ensure that improvement in one practice does not have a negative impact on other practices or outcomes and to determine whether the costs are in proportion to, or “in balance” with, the benefits of the change practice.

Step 3

Discussion Guide for Data Collection Planning

Along with your Change Idea, also consider the questions below while planning for the data collection for your PDSA/ Small Test of Change. Remember that planning for the who, what, when and how of data collection during the Plan phase of the PDSA cycle helps in identifying the types of data needed to evaluate whether the change was an improvement or not.

What types of data are needed for outcome, process, and balance measures in your chosen example/test of change? (see below for examples)

What tools, protocols, or instruments are most relevant and practical for collecting the data needed? Examples include assessments, surveys, checklists, observation forms, logs or journals, interviews, and attendance sheets.

What existing data sources or instruments should be considered for measurement in this cycle? Examples include lesson plans, walkthrough protocols, and formative assessments.

What new data sources or instruments should be considered? Examples include “do now’s” or student exit tickets and interview or survey questions.

When and how frequently will data need to be collected?

Who will be responsible for collecting the data? A teacher, principal, district staff member, or student? What training and instructions related to data collection will be needed?

How will data be compiled and prepared for the data team to review? Will hard-copy data need to be entered electronically? If so, how will this happen? What software or templates will be used? Who is responsible for ensuring that everyone’s data are submitted and prepared for presentation to the Improvement Team?

Examples for data collection planning

Type of measure	Example data sources and methods
Outcome (related to the aim, drivers, or change practice)	• Progress monitoring assessments • Unit or chapter tests • Standardized achievement tests (most appropriate related to the aim rather than the drivers) • Counts to record such information as how many and which students participated in discussion • Ratings to measure the quality or frequency of phenomena such as student reports of confidence in participating in class discussions • “Do now’s” or entry or exit tickets to gather responses to a small number of questions • Surveys of teachers, administrators, students, or family members • Interviews or focus groups of family members, students, teachers, or administrators • Attendance or discipline records • Behavioral checklists completed by teacher, parent, or student to document instances of appropriate or inappropriate behaviors • Nonacademic assessments to assess areas such as social-emotional skills • Student work samples • Observations conducted by peer teachers, administrators, or others to assess such areas as student engagement, social interactions, and time on task • Written logs or gradebooks to record instances of behaviors such as whether students turned in homework

Type of measure	Example data sources and methods
Process (to determine whether change practice was implemented with fidelity and to understand context of implementation)	• Lesson plan surveys to assess instructional activities such as the frequency of practice implementation • Journals, such as for self-reflection on what worked or what did not work • Classroom observations • Administrator walkthroughs • Checklist of actions completed • Interviews or focus groups to collect detailed information on how implementation went • Logs to record instances of a change practice implemented • Administrative records such as class lists to determine characteristics of students who received the change practice
Balance (to identify costs and unintended consequences of the change practice)	• Logs or journals for implementers to record time spent, challenges, and unexpected results • Interviews or focus groups of administrators, teachers, or others involved in the change practice • Surveys to collect specific information on costs, challenges, and fiscal data