
Tools

Check Sheet

Counting and Accumulating Data

Background

The check sheet is a data gathering and interpretation tool that allows teams to systematically record and compile data. The data shows how many times a given event occurs so that patterns and trends can be detected. It is an easy-to-understand format.

When to Use

- When facts are needed, rather than opinions
- When understanding is needed related to patterns and trends
- When agreement is needed based on the same data

How to Use

1. Agree on the data to be collected (definition of events or conditions observed; exactly what data to collect and how). Ask questions: What is the problem? Why should data be collected? How will the collected data be used? Who will collect, organize, and analyze the data? Note: Use cause & effect diagram or brainstorming to determine check sheet categories.
2. Construct an operational definition for each category.
3. Decide on the time period for data collection.
4. Select a sample size, if appropriate. Use a random sample and sufficient number (rule of thumb: square root of group).
5. Design the check sheet. It should be clear, complete, and easy to use. Data includes source (project name, location, who will record the data) and content data (column with defect or event name, columns to record data [e.g., collection days/dates], totals for columns, totals for rows, grand total).
6. Test the form. Do a “dry run” to ensure process consistency.
7. Tally individual data sheets. Maintain raw data for future needs.
8. Analyze the data without making early assumptions.
9. Take action on the data. Develop and implement the plan.

How Does It Look

| Location of Accident | Tally | Total |
|----------------------|----------|-------|
| Bus Stop | IIII | 4 |
| Cafeteria | IIIIIIII | 9 |
| | | 3 |
| TOTAL | | 134 |

Next Steps

A pareto diagram can be used to focus on problems that offer the greatest return on investment. Plan Do Study Act (PDSA) provides a systematic way to plan, implement, monitor and study results, and design next improvements.

