# Breakout Exercise Instructions

**Instructions**

For today’s breakout activity, you will be completing the Plan step of a new PDSA cycle using this PDSA Template. We will practice using PDSA to address challenges related to missing and incomplete data with our sample program—Project Safe Streets.

You will ready the Background on the Issue below and then work your way through the PLAN section of this template for the one of the specific challenges identified (Breakout Rooms 1 and 4 will tackle challenge 1, Breakout Rooms 2 and 5 will tackle challenge 2, and Breakout Rooms 3 and 6 will tackle challenge 3). Take notes on your discussion and respond to the template prompts in the right-hand column of the template. Remember, you’re only going to be completing the PLAN step today. Once you’ve completed the PLAN step, discuss your responses to the prompts as a group.

It may be helpful to assign at least one person to take notes, one person to share screen, and one person to report back out in the main session.

**Background on the Issue**

Project Safe Streets (PSS) is a case management and mentoring program for youth. They have started implementing a new data collection process to help meet their data collection needs for their service delivery and for their own program evaluation. As part of this data collection process, PSS case managers intake data for each young person that enrolls in the program. The intake data includes demographic information, assessment information used to inform case planning, and the pre portion of a pre-post outcome survey related to the young person’s life skills and social supports.

The PSS team is conducting continuous quality improvement using the PDSA cycle to identify ways to improve their data collection processes and the quality of their data. After their first data quality review, they noticed there was a lot of missing and incomplete intake data. After the issue of missing and incomplete intake data was identified, the PSS data team asked the case managers for their input on why this might be happening. Based on this input, there are three main challenges contributing to missing and incomplete intake data. These challenges are listed below.

**Each breakout group will focus on one of these challenges.** *Remember, when you’re doing a PDSA cycle, you want to keep it narrow and focused, so you can test one strategy for one identified issue at a time.*

**Identified Challenges Contributing to Missing Intake Data:**

1. Staff reported they don’t have the capacity to enter the intake data they collect on paper forms in the field because they are in the field all day (Breakout Rooms 1 & 4).
2. Staff reported that many participants are uncomfortable with some questions and refusing to answer them during the initial intake meeting, so staff leave those blank (Breakout Rooms 2 & 5).
3. Some staff reported that they weren’t aware that they were supposed to administer the pre-survey at the same time that they completed the intake form (Breakout Rooms 3 & 6).

# PDSA Template

**PDCA Cycle Timeframe:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Cycle #**:\_\_\_\_\_\_\_\_\_

Use this Plan-Do-Check-Act (PDSA) tool to plan and document your progress with testing changes. Remember that this process will usually involve multiple PDSA cycles in order to achieve your goal.

| BLACK TEXT = Instructions  BLACK TEXT = Questions and instructions that require an answer. |
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| DEFINE THE PROBLEM PDSA Prep - knowing what you want to improve. | |
| --- | --- |
| What is the problem you would like to address in this PDSA cycle? | 1. Staff reported that many participants are uncomfortable with some questions and refusing to answer them during the initial intake meeting, so staff leave those blank (Breakout Rooms 2 & 5). |

| PLAN *What is the change you can make to get better results? What actions will that take, who will be involved, and when. What is the goal and how will we measure it?* | |
| --- | --- |
| What change/strategy are you testing? (make sure it is one variable you are changing) |  |
| What types of information do you need to determine if it’s working?  For each, include the type of data (qualitative vs. quantitative) and with what frequency you will collect the data |  |
| How long will this PDSA cycle be? (How long will you collect data until you study it?) |  |
| How will you know if this change/strategy is successful? |  |
| How will you make time for the PDSA cycle? When will you check in? |  |

| **Action needed to Do:** | **Who** | **Timeline** | **Notes/ Status** |
| --- | --- | --- | --- |
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**Discussion Prompts:**

1. Have you ever used a PDSA cycle before? If so, how did you use it and what was the outcome?
2. Is there a current challenge or issue in your program that might be helpful to address using a PDSA cycle method?

**STOP AFTER THIS PAGE**

| DO *Execute the change/strategy and execute the PDSA PLAN above. Carry out the test on a small scale, collect data, document observations.* | |
| --- | --- |
| Was the cycle carried out as planned? |  |
| What are your observations?  Make note of any surprises, unexpected, or unintended consequences, or major changes that occurred when implementing the change/strategy. |  |
| Prepare data for the STUDY phase. Make sure quantitative and qualitative data can be presented to colleagues to understand and interpret. | |

| STUDY *Analyze the data collected during the DO phase.* | |
| --- | --- |
| **Instructions:**  Follow the protocol (~1 hour) below to strategically and efficiently analyze and utilize the data from the PDSA cycle.  This is ideally done in a group but can be done independently if needed. | |
| REVIEW the PDSA Plan  (3-5 minutes) |  |
| PREDICT what you believe the data will reveal  (2-5 minutes)  Write this in the space to the right. |  |
| EXAMINE the data independently  (10 minutes). |  |
| ASK clarifying questions about the data  (5 minutes) |  |
| OBSERVE what you see in the data without judgment or interpretation and discuss  (10-15 minutes)  Write observations in the space to the right. |  |
| INTERPRET/INFER what the data reveals and discuss.  (10-15 minutes)  Write interpretations in the space to the right. How does this compare to what the goal for this change in the PLAN stage? |  |
| IDENTIFY LESSONS LEARNED and discuss. (5-10 minutes). Do not yet make recommendations (save this for the ACT phase).  Write lessons learned in the space to the right. |  |

| ACT *Based on the data analysis, decide whether to adopt, adapt, or abandon the change/strategy. Answer the questions below to determine how to proceed based on what you learned from the PDSA cycle.* | |
| --- | --- |
| Based on the data and your analysis during the STUDY phase, does this change/strategy move toward success as it was defined in the PLAN? | **Choose one:** *Yes/Somewhat/No*  **Explain:** |
| Based on the answer above, how should we proceed? | **Choose one:**  *Adopt the change/strategy*  *Adapt the change/strategy*  *Abandon the change/strategy* |
| Answer the questions in the space to the right…  **If you chose ADOPT:**  Continue to run the PDSA cycle to monitor if it continues to serve the organization.   1. Do you need to adjust the PDSA plan at all? If so, what is your plan for doing so? 2. Repeat the PDSA cycle.   **If you chose ADAPT:**   1. What is working? What data shows you this? 2. What is not working? What data shows you this? 3. What are some ideas for improvement? Brainstorm before deciding on a plan. 4. After brainstorming, how will adapt the change/strategy?  Which piece(s) of data will you use to determine if there is improvement? 5. Repeat the PDSA cycle.   **If you chose ABANDON:**   1. Record why you chose to abandon the change/strategy and discuss how to proceed. What data led you to this conclusion? 2. Do you need to test something else? 3. Why do you think this new idea will work better than what you have already tried? 4. Execute the PDSA cycle for the new idea. |  |