

PDSA Template

PDCA Cycle Timeframe: _____ **Cycle #:** 1 _____

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.

Background on the Issue

Project Safe Street case managers often refer participants to outside services that Project Safe Streets can't provide directly. When a case manager makes a referral, they should track the date the referral was made and the type of referral in the case management system. The case management system is set up so that case managers select the type of referral from a prepopulated drop-down list. The list includes Substance use treatment services, Clinical mental health services, Tattoo removal, Housing supports, and Other. When a case manager selects Other as the type of referral, a write-in box appears, and they must provide a short description of what type of referral it is.

As part of your quarterly data quality review process, you've identified a data quality issue with your referral data. You've identified that referrals that have been entered in the Other category include referrals for rental assistance, landlord mediation, and security deposit assistance. These types of housing-related referrals should be classified under Housing Supports referrals not Other. When housing-related referrals are not captured in the Housing Supports category, staff who are reporting metrics for the program might undercount how many housing-related referrals were provided.

DEFINE THE PROBLEM

PDSA Prep - knowing what you want to improve.

What is the problem you would like to address in this PDSA cycle?

Referrals related to Housing Supports (rental assistance, landlord mediation, and security deposit assistance) and being entered into the case management system as Other referrals, which makes it difficult to accurately report on the amount of housing support provided each quarter.

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)

Creating a Case Management Referral Data Desk Guide that defines what should be included in each referral type and provides a point of contact for questions.

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

Staff feedback survey (qual) (quarterly): Questions include:

- What, if anything, have you found helpful about the new Case Management Referral Data Desk Guide?
- What, if anything, would you like more guidance on?

Referral data from case management system (quant) (monthly): Frequencies of referrals by type, including classifications within the Other write-in category

How long will this PDSA cycle be? (How long will you collect data until you study it?)	1 quarter cycle
How will you know if this change/strategy is successful?	Referral data reported during that quarter will align with the new guidance and staff will report no further guidance needs in the staff survey.
How will you make time for the PDSA cycle? When will you check in?	Check in during our monthly program data monitoring meeting

Action needed to Do:	Who	Timeline	Notes/ Status
Develop Case Management Referral Data Desk Guide	Data Manager will develop; Case Management Supervisor will review	Complete by 3/20	Complete
Onboard case managers to Case Management Referral Data Desk Guide at Case Manager weekly meeting	Case Management Supervisor	3/25	Complete
Complete monthly referral data analysis and enter results into PDSA tracking log	Data Manager	Complete the first week of each month in May, June, and July for Quarter 2 data (Apr – June). Final data will be	In process

		ready by 7/15	
Develop staff feedback survey in Google Forms and send to case managers	Case Management Supervisor	Send by 6/20 with a deadline to complete by 6/30	Not started
Compile staff feedback survey results in PDSA tracking log	Case Management Supervisor	7/15	Not started

<p>DO</p> <p><i>Execute the change/strategy and execute the PDSA PLAN above. Carry out the test on a small scale, collect data, document observations.</i></p>	
<p>Was the cycle carried out as planned?</p>	<p>Yes, we stuck to our original timeline to collect data for all of Q2 (April, May, and June)</p>
<p>What are your observations? Make note of any surprises, unexpected, or unintended consequences, or major changes that occurred when implementing the change/strategy.</p>	<p>Desk Guide was initially really well received by case managers when we rolled it out, but we onboarded two new case managers in early May and forgot to provide them with the Desk Guide until early June.</p>
<p>Prepare data for the STUDY phase. Make sure quantitative and qualitative data can be presented to colleagues to understand and interpret.</p>	

Table 1. Referral Data by Month

March		April		May		June	
Housing Supports	Other	Housing Supports	Other	Housing Supports	Other	Housing Supports	Other
3	16	10	7	6	14	15	5
Housing-related referrals included in Other (n=12): <ul style="list-style-type: none"> • Rental assistance • Security deposit • Landlord mediation 		Housing-related referrals included in Other (n=3): <ul style="list-style-type: none"> • Security deposit • Tenant rights workshops 		Housing-related referrals included in Other (n=8): <ul style="list-style-type: none"> • Security deposit • Landlord mediation • Tenant rights workshops 		Housing-related referrals included in Other (n=2): <ul style="list-style-type: none"> • Tenant rights workshops 	

Table 2. Staff Feedback Survey Results

<p>What, if anything, have you found helpful about the new Case Management Referral Data Desk Guide?</p>	<p>What, if anything, would you like more guidance on?</p>
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<ul style="list-style-type: none"> - "I like having a quick reference to know where to enter referrals I don't make very often, and I don't have to click through all the options in the system to try to find where it goes." - "I like being able to see what types of referrals others have made for clients. It's helpful for case planning too." - "I like not having to ask my supervisor where to enter things to know I am doing it right, and I also like that I can reach out to the contact with questions if I do have them." 	<ul style="list-style-type: none"> - "I still don't understand if tenant rights workshops should go under legal supports or housing supports. It feels like both to me." - "I wish the guide also doubled as a resource guide for referrals so everything could be in one place for me." - "I wish I had gotten this during my onboarding process."
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<h2 style="margin: 0;">STUDY</h2> <p style="margin: 0;"><i>Analyze the data collected during the DO phase.</i></p>	
<p>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.</p>	
REVIEW the PDSA Plan (3-5 minutes)	-
PREDICT what you believe the data will reveal (2-5 minutes) <i>Write this in the space to the right.</i>	I think the guide will have helped improve the referral categorization, but I think the data won't be fully aligned with guide yet because of the onboarding mishap with the new case managers.
EXAMINE the data independently (10 minutes).	-
ASK clarifying questions about the data (5 minutes)	Did we check to see if any tenants' rights workshop referrals were entered under

	the Legal Support category?
<p>OBSERVE what you see in the data without judgment or interpretation and discuss (10-15 minutes) Write observations in the space to the right.</p>	<p>Incorrect categorization of housing support referrals is fairly low for April and June, but still quite high in May.</p> <p>Tenants rights workshops is a new housing related referral type that is being added under Other.</p> <p>Staff like the utility of the desk guide and are using it. Staff have suggestions for expanding on the desk guide, including using it as a resource guide as well and clarifying where tenant rights workshops should go.</p> <p>At least one new case manager didn't get the guide during their onboarding process.</p>
<p>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?</p>	<p>We haven't quite met our goal to have all referrals align with the desk guide guidance, but it has helped improve the quality of the data.</p> <p>Guidance on where to enter tenant rights workshops is missing from the guide.</p> <p>Desk Guide would likely need to be reviewed regularly to make sure it's still relevant to the types of referrals the case managers are making.</p>
<p>IDENTIFY LESSONS LEARNED and discuss. (5-10 minutes). Do not yet make recommendations (save this for the ACT phase).</p>	<p>Should include a step in our PDSA cycle planning to identify cross over between processes (adding new trainings to the onboarding training calendar for new</p>

Write lessons learned in the space to the right.

staff) so new processes don't fall through the cracks for new staff.

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.