# Implementing Plan-Do-Study-Act Cycles

## Virtual Meeting Facilitation Guide

## [Date], [Approx. 60-Minute Time Slot]

### Objectives:

* Describe plan-do-study-act (PDSA) cycles and how they support continuous improvement
* Identify three types of improvement cycles and understand when to use them
* Understand the benefits of using PDSA cycles to improve
* Explain the role of PDSA cycles in systemic improvement

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Time\* | Topic | Activity | Learning Objectives | Resources |
| 5 min. | Welcome and Introductions |  | * Welcome participants and provide time for new participants to introduce themselves. Ask new members to share their name, position/title, organization affiliation, and core job responsibilities and expertise.
* Summarize the previous meeting objectives and outcomes.
* Introduce key objectives for this meeting (see above).
 | * Agenda
 |
| 25 min. | Implementing PDSA Cycles | Presentation | * Using the PowerPoint (PPT) presentation, provide an overview of plan-do-study-act (PDSA) improvement cycles.
* Allow time for discussion and Q&A. Ask participants to share personal experiences when they may have implemented PDSA cycles.
	+ What did participants learn from their experience implementing PDSA cycles in the past?
	+ What challenges emerged? How did they address these challenges?
	+ Encourage participants to identify key principles to support effective implementation of PDSA cycles.
 | * PPT Presentation
 |
| 25 min. |  | Plan for PDSA Implementation  | * Revisit and finalize the theory of action. Ask members to review and confirm that the theory of action is final.
* Revisit and finalize the logic model, which should articulate the expected resources, inputs/activities, outputs, and outcomes associated with one or more components (i.e., change practices) within the theory of action. Ask members to review and confirm that the change practice should theoretically address the problem of practice and accomplish stated goals. Use the following questions to guide final revisions:
	+ Is the change practice high-leverage? A high-leverage practice is one that can be easily implemented and produces significant change in a short time.
	+ If implemented with fidelity, will the planned changes produce desired short- and long-term outputs and outcomes in the logic model?
* Revisit the implementation and outcome measures. Ask members to review (or identify) and confirm that measures are practical to use, can be collected frequently, and are sensitive to small changes in practice.
* Develop the implementation plan.
	+ What is being measured in this PDSA cycle, and how will we measure it? For example, how will we measure whether the practice was implemented with fidelity? In this round of PDSA cycles, are we interested in measuring how the practice influences outputs? Outcomes? Both? And how are we measuring those outputs and outcomes?
	+ Who will participate?
	+ What are the roles and responsibilities of key participants? For example, key roles may include:
		- Research specialists
		- Technology specialists (e.g., creating the data reporting tools)
		- PDSA coordinators (e.g., principal/assistant principal)
		- Data collectors (e.g., teachers)
	+ How long will the first implementation cycle last? When will the data collection cycle begin and end?
	+ What additional supports and resources do PDSA implementers need to support fidelity of implementation and data collection?
 | * PPT Presentation

Attachment: Measurement Infrastructure to Support Evidence Collection |
| 5 min. | Wrap-Up and Next Steps |  | * Assign follow-up activities and finalize plans, which may include:
	+ Developing an automated reporting tool or system (e.g., tools such as a Google form that automatically summarizes and presents results to be collected through the PDSA cycle. For more information, see “Next Steps” in the Measurement Infrastructure Facilitator Guide.)
	+ Finalizing the implementation plan and timeline
	+ Securing site participation (e.g., districts, schools) and executing a Memorandum of Understanding (MOU)
	+ Securing resources and materials within the participating sites (e.g., implementation guides for end users; help guides, FAQs)
	+ Recruiting and securing individuals (e.g., teachers) within each site who will engage in the improvement effort
	+ Providing training to individual participants to ensure the change practice is implemented with fidelity and data are accurately captured and reported
	+ Initiating the PDSA cycle
 |  |

\*Times are estimates only. Time may fluctuate based on the nature of the discussion, group size, and meeting format (e.g., face-to-face vs. virtual).

**Attachment**

**Example:**

**Measurement Infrastructure to Support Evidence Collection for Continuous Improvement**

