Designing and Executing PDSAs

Preconception CoIIN Year 2 Meeting

January 17-18, 2019

Presenter: Lou Anne Stout, MBA, CLSSBB, PMP
Objectives

By the end of this session, participants will:

- Understand basics of PDSA
- Know safeguards that will promote PDSA success
- Know how to design a Preconception CoIIN PDSA to test

❖ Shared Learning Question
Innovation and Quality Improvement

Overlapping values and aspects

Innovation
Human Centered Design

Quality Improvement
Plan Do Study Act
What is PDSA?

- Rapid tests of change

What’s its purpose?

- Learning

**Act**
- What changes are to be made?
- Adapt? Or Abandon?
- Next cycle?

**Plan**
- Objective of cycle
- Questions/predictions
- Plan to carry out the cycle (who, what, where, when)

**Study**
- Complete the analysis of data
- Compare data to predictions
- Summarize what was learned

**Do**
- Carry out the plan
- Document problems/unexpected observations
- Begin analysis of data
Avoid Potential Pitfalls

1. Take time to plan
   a) Identify its purpose – what do we want to learn?
   b) Predict PDSA results – what do we think will happen?
   c) Design a data collection and analysis plan that provide required answers
   d) Engage stakeholders in planning, testing, and data analysis
   e) Use PDSA findings to plan a new cycle

The problem with Plan-Do-Study-Act cycles
https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4789701/
Avoid Potential Pitfalls

2. Be sure to record and share your learning from each cycle

3. Take sufficient time conduct the learning to improve success for full-scale implementation

4. Identify a PDSA ending timeframe

5. Determine how the successful intervention will be sustained in practice
Tips for Testing Changes

**Importance of the PDSA Cycle**

- It allows you to:
  - Plan how you will learn and improve.
  - Try a change on a small scale.
  - Make observations about the results of the change.
  - Take quick action based on what was learned by reflecting, adapting, or abandoning a change.

**Key Components of the PDSA Cycle**

1. **Plan**:
   - Decide what you hope to learn.
   - Describe how the change will be carried out.
   - Be specific about who, what, when, where, and why.
   - Describe how you will collect data (both qualitative and quantitative data).
   - Be specific about who, what, when, where, and why.
   - Do the change as planned on a small scale for a short time frame.
   - Study the data collected while carrying out the change.
   - Act on what was learned.
   - Decide whether the change should be elaborated, adapted, or abandoned.
   - Make adaptations to the change.
   - Plan how you will try the change with the new adaptations. Then, start over with a new PDSA tool to test the same change again but including these new adaptations.

2. **Do**

3. **Study**

4. **Act**

**Tips for Success**

- Test on a small scale before wide-scale implementation.
- Start with a small number (e.g., 1 or 2 people) to try a change over time.
- Use the “Drop Two” principle to scale down instead of testing for a shorter time.

**Short Time Frame**

- Each time you complete a PDSA cycle, build on the knowledge and data collected to expand your learning until you are confident a change is ready to implement and will result in an improvement.

**Small Number**

- Build on learning and improving.
- Include an agenda item for implementation team meetings.
- Hold brief 5-10 minute meetings during active testing to quickly share lessons learned and recommendations for action.
- Capture lessons learned in a standard way (e.g., in an email spreadsheet, on the wall, etc.)
Tips for Testing Changes

- Years
- Quarters
- Months
- Weeks
- Days
- Hours
- Minutes

“Drop Two”
Rapid Tests of Change

Changes That Result in Improvement

Implementation of Change

Wide-Scale Tests of Change

Follow-up Tests

Very Small Scale Test

Hunches Theories Ideas

Learning

*Langley GL, Nolan KM, Nolan TW, Norman CL, Provost LP.*
Changes in Parallel

Team 1

Team 2

Team 3

Brochure  Video  Workflow  Referrals  Staff Training
PDSA Planning and Tracking

- Why use a PDSA planning form?
- Who designs and plans the PDSA?
- Who conducts the test?
Activity: Designing a PDSA

ONE KEY QUESTION®

Ask*: “Would you like to become pregnant in the next year?”

Ask*: "Would you like to become pregnant in the next year?"

**YES**

Review Chronic Health Conditions, Urgent Psychosocial Concerns,
Prescribe Multi-vitamin with Folic acid

- Medication Review
  - Review birth spacing recommendations and optional timing for wellness
  - Develop follow up plan for additional preconception care and assess contraception needs

**OK EITHER WAY**

- Screen for current contraception use
  - Assess satisfaction of method and compliance of use
  - Review effectiveness, offer all options including LARC and Emergency Contraception

**UNSURE**

- Screen for current contraception use
  - Assess satisfaction of method and compliance of use
  - Review effectiveness, offer all options including LARC and Emergency Contraception

**NO**

- Screen for current contraception use
  - Assess satisfaction of method and compliance of use
  - Review effectiveness, offer all options including LARC and Emergency Contraception

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Designing a PDSA (Plan)

Objective for this Test
(Why are you doing this test? What do you hope to learn?)
Designing a PDSA (Plan)

Specific Questions to Address

1. 
2. 
3. 
4.
Designing a PDSA (Plan)

Specific Questions to Address

**Initial Question**

1. Is the new screening approach being implemented correctly?
2. Is the new approach taking more time?
3. Do consumers understand the new program’s education tools?
4. Are we practicing health equity in our implementation?

**More Useful Question**

1. What % of providers are correctly implementing the new approach?
2. How much more time is the new approach taking?
3. To what extent (%) are consumers understanding the education tools?
4. What is the % breakdown of people of color receiving OKQ?
Designing a PDSA (Plan)

Specific Questions to Address

1.
2.
3.
4.
Designing a PDSA (Plan)

Predictions/Hypotheses
(What do you think will happen when the test is done?)
Designing a PDSA (Plan)

Plan for Test

<table>
<thead>
<tr>
<th>Tasks to Complete</th>
<th>Who?</th>
<th>What and How?</th>
<th>When?</th>
<th>Where?</th>
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Plan for Data Collection *(Does each measure link to the Specific Questions and/or to the Plan?)*

<table>
<thead>
<tr>
<th>What to measure</th>
<th>Who?</th>
<th>How to measure?</th>
<th>When?</th>
<th>For how long?</th>
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Tips for PDSA Data Collection

1. The Questions developed during PDSA planning promote efficient data collection
2. Consider data sampling to conserve resources and reduce burden
3. Develop a form on which to record data for the PDSA; test it first
4. Train staff who will collect the data
5. Document unusual circumstances
What’s Next?

**Act**
- What changes are to be made?
- Adapt? Or Abandon?
- Next cycle?

**Plan**
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**Do**
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### PDSA Cycle Tracking Form

<table>
<thead>
<tr>
<th>Cycle No.</th>
<th>PLAN</th>
<th>DO</th>
<th>STUDY</th>
<th>ACT</th>
</tr>
</thead>
</table>
| 1         | • What will you test?  
• How will you test it? For how long?  
• With whom (and how many) will you test it?  
• Who will oversee this cycle? | • What data did you collect?  
• What did you observe?  
• What problems occurred?  
• Were there any special circumstances? | • Was the cycle carried out as planned?  
• What did you learn?  
• What worked well?  
• What could be improved? | • Adapt, Adopt, Abandon? Why?  
• How will you adapt the change?  
• Explain the changes in the Plan column for the next test cycle. |
| 2         |      |    |       |     |

- **Why monitor test cycles? Who will do this?**
- **Is it difficult to monitor/document cycles? (Why don’t we do this well?)**
- **When do we adapt a test and start another cycle of testing?**
Shared Learning

- How do you sustain the gains?
- What do you do with your documented learnings?
- To whom will you communicate accomplishments?
Summary

Remember to . . .

- Use a PDSA template
- Plan for the “do, study, act”
- Plan measures and analysis
- Start small and ramp up
- Record and share learnings
- Involve stakeholders
Questions?

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