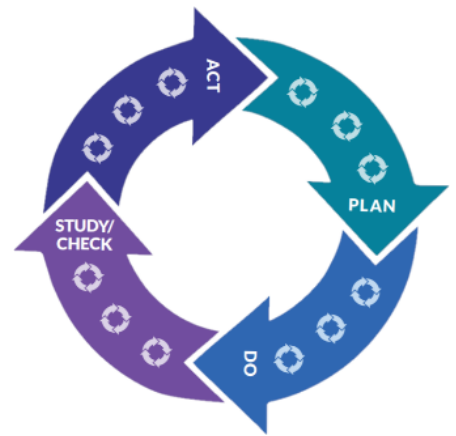




## Testing Changes in School Mental Health System Improvement

### Purpose

The purpose of this tool is to help teams plan and test changes to their school mental health system with the goal of improvement. A Plan, Do, Study, Act (PDSA) cycle involves making a small change in day-to-day processes or procedures while observing the impacts in the real world (Bennet et. al 2022). It helps teams organize their work and make steady progress towards improvement goals. PDSA cycles also help teams move from ideas about how to improve the school mental health system to action. When schools engage in multiple, iterative PDSA cycles over time, they are engaging in continuous improvement.



A PDSA cycle includes:

- **Plan:** In the Planning step, teams examine existing needs to determine the aim of their improvement work, make predictions about what will happen and why, and determine the logistics of testing the chosen change idea and collecting needed data.
- **Do:** In the Do step, teams make one small change in day-to-day operations. Teams should record observations so when tests are successful, they can pinpoint what change has made that impact. These observations also shape future PDSA cycles.
- **Study:** In the Study step, teams set aside time to study the results of their test by comparing their observations to predictions, creating a summary of what was learned, and reflecting on learning.
- **Act:** In the Act step, teams decide how to incorporate their learning to inform next steps. Teams may choose to:
  - Abandon the change idea (go back to planning and select a new change idea).
  - Adapt the change idea (make small modifications before testing again). Adopt the change idea (standardize the change by spreading and scaling). Teams should only choose to adopt a change idea after it has been tested multiple times, in many different conditions.

## Rapid Cycle Testing

Rapid cycle testing involves implementing PDSA cycles in quick succession. When schools use rapid cycle testing, they select and implement a small-scale change, run a short test to learn what they can, and use the learning to get better in the next iteration of the test (UW-Madison 2024). Rapid cycle testing helps teams quickly bridge the gap between research and knowing what best practices are in school mental health and being able to overcome local challenges when trying to implement those best practices.

Doing multiple, quick PDSAs on a small scale is beneficial because it:

- Does not require a large investment of resources, so minimizes risk.
- Is less disruptive to students and staff than large-scale change.
- Reduces resistance to change by building support as more and more people are included in and give feedback on the changes.
- Provides an understanding of what will work, and how much improvement can be expected when the change is implemented in all settings.

(UW-Madison 2024)

Many districts already use improvement planning to move towards their goals, often with yearlong PDSA cycles. While this approach can be helpful for articulating a long-term vision, it often depends upon an improvement plan to be made and carried out without opportunities to learn and course correct along the way. Rapid cycle testing helps break down those long-term improvement plans into manageable pieces. Teams can use small, rapid cycle tests within their year-long improvement cycles to stay action oriented and make sure they are moving through their broader plan with a data driven approach. Rather than spending large amounts of time on planning and doing tasks, teams test changes in the actual settings where they will be implemented and make adaptations as unanticipated challenges arise.

## Generating Change Ideas and Tests

Before running PDSA cycles, teams should create a [driver diagram](#) to articulate their theory of improvement and brainstorm change ideas and tests. Change ideas are an alteration to a system or process that can be tested using a PDSA cycle to learn about how that change improves a driver in the theory of improvement (Bennet et al 2022).

A change idea should be:

- specific,
- feasible given resources, time, etc.,
- directly linked to the team's aim and drivers,
- able to make a large impact as indicated by existing research and practice knowledge,

- tested with multiple, short test (PDSA) cycles (within a two-week time frame) and on a small scale (involving a few people to start), and
- reflect the needs of the community.

## EQUITY CHECK ✓





- Are our change ideas based on deficit understandings of the populations we serve?
- Whose knowledge is reflected in our change ideas?
- Is our documentation in the “do” step reflective of all the experiences of those affected by the change? Whose experience is missing?
- Whose perspectives and suggestions were considered in the act phase, when teams decide to adapt, adopt, or abandon? Whose perspectives were missing?



(Hinnant-Crawford 2020)

If teams are having difficulty identifying potential change ideas, they can use methods such as scanning research and best practice literature, getting ideas from “bright spots” or examples of practice where schools have made progress on a similar aim, connecting with experts, or using creative thinking techniques (Byrk et. al 2015).

After selecting a change idea, teams brainstorm possible ways to test it. A test involves making an alteration in day-to day operations, observing the impact, and comparing it to what the team predicted would happen. Tests should be implemented on a small scale, starting with one or two students, caregivers, staff members, etc. and take no longer than two weeks to implement. Teams should be sure to include an actual change in their test, not just doing tasks or activities. For example, a team that has the goal of increasing the efficiency of their school mental health referral pathway might generate the idea to have staff, students, and caregivers use a common referral form. The team would start by developing a new referral form, which is a task. To test the form, the team would need to use the form with a few people, get feedback, and see if the form is creating the desired improvement in the referral process. *Table 1* provides some examples of change ideas and tests, organized by components of the WI School Mental Health Framework.

Table 1: Example Change ideas and Tests by Component

Component	Change Ideas	Possible Test
 <b>Continuum of Mental Health Supports</b>	<p>Implement a new process for matching early intervention and treatment services and supports to student needs and strengths.</p> <hr/> <p>Implement short, weekly social and emotional learning lessons to address skills gaps identified by the SEL competence assessment and the current SEL curriculum.</p>	<p>Use the teacher care meeting protocol with one student referred for supports and get feedback on how it went.</p> <hr/> <p>Implement 15-minute social and emotional learning lesson in one classroom and use exit tickets to gauge student response.</p>
 <b>Collaboration</b>	<p>Meaningfully involve students and caregivers in school mental health by better using the existing advisory council.</p> <hr/> <p>Increase opportunities for co-located mental health providers to collaborate with school staff.</p>	<p>Develop a new advisory council meeting agenda and get feedback from two council members.</p> <hr/> <p>Test a feedback form that updates the school staff member on the status of their referral to the co-located provider</p>
 <b>Needs Assessment &amp; Resource Mapping</b>	<p>Develop a collaborative process to keep the resource map updated and staff informed.</p> <hr/> <p>Assess student mental health needs with informal feedback opportunities.</p>	<p>Create a resource update form to share with community partners and get feedback from a partner on feasibility of use.</p> <hr/> <p>Implement a short survey during one advisory period with one class and ask students for feedback on the process.</p>
 <b>Referral Pathways</b>	<p>Increase teacher ability to identify when a student is struggling and when a referral may be necessary.</p> <hr/> <p>Use a formalized process for managing mental health referral triage.</p>	<p>Collect feedback and create a flyer to be posted in staff areas that explains when a referral is appropriate.</p> <hr/> <p>Develop a flowchart, use it on referrals for the next week, and talk with implementing staff during lunch duty about how it went.</p>
	<p>Collect data on mental health-related visits to the nurse to better identify students who may need support.</p>	<p>Tracks nurse visits for two weeks and analyze data during</p>

		the next mental health team meeting.
	Increase opportunities to share school mental health related data with the community.	Get feedback on a new district newsletter section on mental health from three families.
	Implement brief in-classroom coaching focused on helping teachers use culturally responsive, trauma sensitive practices in the classroom.	Implement a brief coaching session with a small group of teachers and run a focus group to get feedback.
	Implement a new teacher retention strategy.	Run a compassion resilience circle with a small group of willing teachers and have participants complete a short exit ticket.

## Framing

DPI's [Roadmap for School Mental Health Improvement](#) outlines five steps for increasing the quality of their school mental health system. In the planning step, teams assess needs, engage in root cause analysis, and develop a theory of improvement using a driver diagram. The driver diagram tool walks teams through the process of generating change ideas and ways to test those ideas. In the implementation step, teams use the change ideas and possible tests from the driver diagram to engage in iterative PDSA cycles. In the reflection step, teams consider how multiple PDSA cycles have moved teams closer to their improvement goals.



## Documenting

Documenting PDSA cycles helps teams track what they've tried, what has worked, and what has not worked. As teams attempt to replicate and scale up successes they have experienced on a small scale, they can refer to the PDSA documents to better understand what it was that created the improvement. The PDSA completion guide walks teams through each step of documenting a PDSA process. Teams can use the included PDSA example and template to plan and document their own PDSA cycles.

## PDSA Worksheet Completion Guide

1. The start and end date should be no longer than two weeks! A PDSA is a quick test on a small scale. If it can't be tested in that time frame, the change idea is too big.
2. Record a change in day-to-day processes or procedures that are predicted to result in improvement, including both what is changing and the predicted improvement. Example: *If we engage more caregivers in the truancy meeting process (change) then we will see a decrease in chronic absenteeism (improvement).*
3. A change idea can be categorized into one or more of the components of the Wisconsin School Mental Health Framework (continuum of supports, collaboration, needs assessment and resource mapping, mental health referral pathways, data, and sustainability). Select the component where your change idea fits best.
4. The question should be directly related to the test. Example: *Will changing the way we schedule truancy meetings make caregivers more likely to attend?*
5. The test should be brief, action-oriented and make an actual change or ONE small “tweak” to how something is done. The effect can be observed right away or within a few days. Remember, a task is not a test. Example: *We will implement a revised scheduling process for the next truancy meeting.*
6. Include the team’s plan for capturing feedback and observations of those involved in the test of change. Teams should plan to collect data that is easy to gather and embedded in everyday work. Example: *A two-question survey, an exit ticket, completing a Plus/Delta with the people involved in making or receiving the change, an informal discussion during lunch duty, a brief focus group, etc.*

**PDSA Worksheet**

District/School: \_\_\_\_\_

Test Start & End Date: \_\_\_\_\_

What change idea does this test? \_\_\_\_\_

Which component of the Wisconsin School Mental Health framework does this test? Choose Item \_\_\_\_\_

**PLAN**

What questions do you want this test to answer? \_\_\_\_\_

Briefly describe the test: \_\_\_\_\_

What do you predict will happen? \_\_\_\_\_

Plan for data collection. How will you know the change is an improvement? \_\_\_\_\_

**PDSA Worksheet**

Implementation Plan

What (list the tasks necessary to complete the test)	Who (person responsible)	When	Where
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**DO**

Record data and observations from test: \_\_\_\_\_

What did you observe that was not part of your plan? \_\_\_\_\_

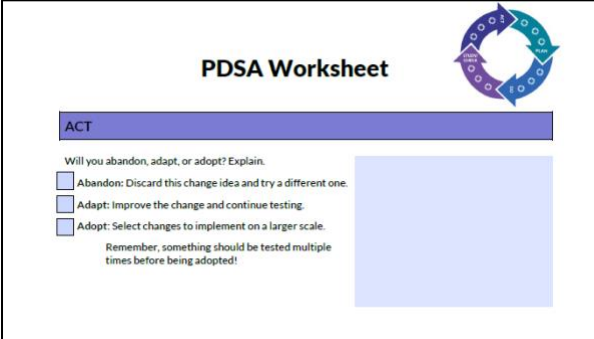
**STUDY**

Was the cycle carried out as planned?  Yes  No

Compare the results of your test to how things were previously. \_\_\_\_\_

What did you learn? \_\_\_\_\_

7. The implementation plan should include all the tasks or activities related to carrying out the test.
8. Record anything the team did not predict would happen. This should include any unintended consequences of the test.
9. Describe how the observed results are different than what was happening before.
10. The point of a PDSA is to learn. So even if the test did not go as planned, that's important learning that teams should capture and use to shape future tests.
11. Select either abandon, adapt, or adopt.  
Remember, you should run several tests before spreading and scaling up a change. Each test should include more conditions (multiple situations/settings/staffing) until the team is confident that they have worked out all potential issues and that the change is an improvement.



**PDSA Worksheet**

**ACT**

Will you abandon, adapt, or adopt? Explain.

- Abandon: Discard this change idea and try a different one.
- Adapt: Improve the change and continue testing.
- Adopt: Select changes to implement on a larger scale.

Remember, something should be tested multiple times before being adopted!

The form includes a circular diagram in the top right corner with arrows and the letters P, D, S, A, and a large light blue rectangular area on the right side for notes.

## References

Bennet, Brandon, Gunrow, Alicia, Park, Sandra. 2022. *Improvement Science at Your Fingertips*. San Francisco, CA: Improvement Collective and ISC LLC.

Bryk, A. S., Gomez, L. M., Grunow, A., & LeMahieu, P. G. 2015. *Learning to Improve: How America's Schools Can Get Better at Getting Better*. Cambridge, MA: Harvard Education Press.

Hinnant-Crawford, B. N. 2020. *Improvement Science in Education*. Myers Education Press.

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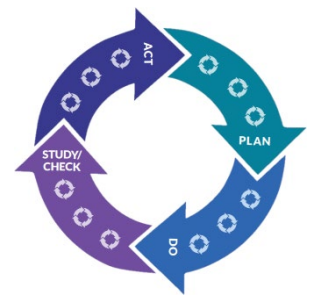
Wisconsin Department of Public Instruction  
Student Service/Prevention & Wellness Team  
Liz Krubsack, School Mental Health Consultant  
125 S. Webster Street, P.O. Box 7841  
Madison, WI 53707-7841  
(608) 264-6719  
Elizabeth.krubsack@dpi.wi.gov  
<https://dpi.wi.gov/sspw/mental-health>

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# PDSA Example



District/School:

Test Start & End Date:

What change idea does this test?

Which component of the Wisconsin School Mental Health framework does this test?

## PLAN

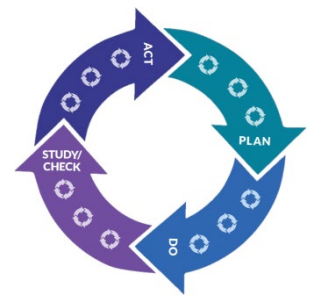
What questions do you want this test to answer?

Briefly describe the test:

What do you predict will happen?

Plan for data collection. How will you know the change is an improvement?

# PDSA Worksheet



## Implementation Plan

What (list the tasks necessary to complete the test)	Who (person responsible)	When	Where

## DO

Record data and observations from test:

What did you observe that was not part of your plan?

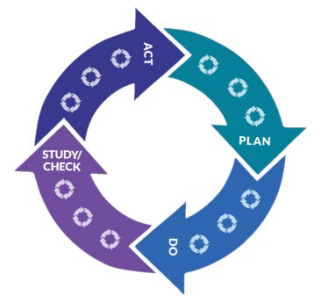
## STUDY

Was the cycle carried out as planned?      Yes      No

Compare the results of your test to how things were previously.

What did you learn?

# PDSA Worksheet



## ACT

Will you abandon, adapt, or adopt? Explain.

**Abandon:** Discard this change idea and try a different one.

**Adapt:** Improve the change and continue testing.

**Adopt:** Select changes to implement on a larger scale.

Remember, something should be tested multiple times before being adopted!