CQI 101
Plan-Do-Study-Act Improvement Cycle
PLAN PHASE Exercise

Instructions: Select one (1) of the scenarios below and work with your team to simulate all four (4) tasks of the PLAN Phase of a PDSA cycle

Scenario 1: Supportive adult connection for youth in community-based programming for at least 6 months

Survey results show that the % of youth reporting a connection to at least one caring adult fell below the 90% target at every site, dropping 8 points agency-wide from 87% to 79% in one year.

Scenario 2: Parent participation

Data shows that the number of parents participating in workshops and parenting events has steadily decreased over the past quarter. The target is to have at least 15 parents in attendance at any workshop or event held; the program has been averaging only 5 -6 parents per event.

Scenario 3: Resource referral and connection

The client tracker shows that 50 families were referred for concrete services in January 2026. However, follow-up calls with these families indicate only 16 were actually connected to resources; the goal is to have all referred families get connected with the resources they need.

PLAN PHASE

Task 1: We observe *there is an outcome or performance area in need of improvement based on the data.*
Review the performance data report and note observations based on the following questions and articulate a clear problem statement

a. *Is performance getting better, worse or staying the same?*
b. *What strategic priority or practice is this performance related to?*
c. *Where does the variation from targeted performance live? Disaggregate the data?*
d. *Is additional data needed to understand the problem?*
e. *Are there strong areas of performance?*

Common pitfalls to avoid*: Poorly defining the problem; failure to identify and equip key stakeholders; jumping to causes and solutions*

PROBLEM STATEMENT:

Task 2: We think it's because *of this root cause*

a. *Who should be involved in this analysis? (frontline staff, clients, supervisors, etc.):*
b. *Why is this problem occurring? What are the underlying causes?*

Common Pitfalls to Avoid: Poor definition of contributing factors/causes of the problem; failure to engage and equip key stakeholders.

Problem Statement from Task 1:
Why is this happening?
Why is that?
Why is that?
Why is that?
Why is that?
ROOT CAUSE:

CHAPIN HALL

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Task 3: So, we plan to propose this small test of change, intervention, or solution that may improve performance. Be specific: what exactly? With whom? For how long?
Task 4: Which we think will result in the following desired outcomes and/or level of improvement
SMART GOAL:

CHAPIN HALL

Wrap-up and Next Steps

KEY TAKEAWAYS ABOUT THE PLAN PHASE:

STEPS I CAN TAKE IN THE NEXT 60 DAYS TO BUILD OR FURTHER ENHANCE MY CQI PRACTICE:

CHAPIN HALL