

# PDSA Planning Template

Date October 2, 2020

<p><b>Topic/Area of Focus:</b> Fidelity Assessment</p>
<p><b>Team Members</b> Dr. Ward (Special Education Director), Ms. Farmer (Special Education Coordinator), Dr. Franco (Attendance Specialist), Dr. Metz (Behavior Specialist), Ms. Pierce (High School Teacher/Mentor), Ms. Thomas (Parent Representative), Dr. Newell (Lead Program Coordinator), Ms. Southerland (Principal), Mr. Leary (Data Analyst)</p>
<p><b>What are we trying to accomplish? (Objective/Aim):</b> The aim of this/these PDSA cycle/s is to develop a process for measuring the fidelity of the M&amp;M mentoring program that ensures the following dimensions of fidelity are accurately measured:</p> <ul style="list-style-type: none"> <li>• Adherence to the program as described including clear evidence of each of the critical components in mentoring sessions</li> <li>• Evidence of the correct amount and frequency of mentor sessions</li> <li>• High quality mentoring sessions</li> <li>• Participant responsiveness to the process AND the mentoring</li> </ul> <p>Evidence will be collected for each element of the protocol.</p>
<p><b>What change can we make that will result in an improvement?</b></p> <p><input checked="" type="checkbox"/> Developing a change: Developing fidelity assessment</p> <p><input type="checkbox"/> Testing a change:</p> <p><input type="checkbox"/> Scaling or spreading a change:</p>
<p><b>Prediction/Hypothesis</b></p> <p><b>If we</b></p> <p>..... develop a process for measuring the fidelity of the M&amp;M program .....</p> <p><b>it will result in</b></p> <p>..... students having access to high quality mentoring and improved grades, attendance, and behavior. .....</p>

<p><b>FOR EVERY CYCLE you are going to need the following:</b></p>	
<p><b>PLAN</b></p> <p>Tip: Start small!</p> <p>Who, What, Where, How and Data Collection:</p>	<p><b>Who</b></p> <ul style="list-style-type: none"> <li>• Who will make the change?</li> <li>• Who will receive the change?</li> </ul> <p><b>What</b></p> <ul style="list-style-type: none"> <li>• What change is being tested?</li> </ul> <p><b>When</b></p> <ul style="list-style-type: none"> <li>• When will the change take place?</li> </ul> <p><b>How</b></p> <ul style="list-style-type: none"> <li>• How will the change be tested?</li> </ul> <p><b>Where</b></p> <ul style="list-style-type: none"> <li>• Where will the change take place?</li> </ul> <p><b>Plan for data collection:</b></p> <ul style="list-style-type: none"> <li>• What information is important to collect?</li> <li>• Why is it important to collect?</li> <li>• Who will collect the information?</li> <li>• Who will analyze the information prior to the study?</li> <li>• Where will information be collected?</li> <li>• When will information be collected?</li> <li>• How will the information (measures) be collected?</li> <li>• What tasks or tools are needed?</li> </ul>
<p><b>DO</b></p> <p>Carry out the change or test and collect data.</p>	<ul style="list-style-type: none"> <li>• When was the plan completed?</li> <li>• What was observed?</li> <li>• Were problems or any special circumstances encountered?</li> <li>• Did you tweak the original plan?</li> <li>• Was the test carried out as planned?</li> </ul>
<p><b>STUDY</b></p> <p>Analyze and summarize data (quantitative and qualitative).</p>	<ul style="list-style-type: none"> <li>• What went well?</li> <li>• What could be improved?</li> <li>• How did the data compare to your predictions?</li> <li>• What did you learn?</li> <li>• What surprised you?</li> </ul>
<p><b>ACT</b></p> <p>Document what was learned and plan next cycle.</p>	<ul style="list-style-type: none"> <li>• Should you Adapt, Adopt, or Abandon the change?</li> <li>• What changes need to be made?</li> <li>• What adaptations are needed?</li> <li>• Are you confident that you should expand the size/scope of test?</li> </ul>

Cycle Number 1

**PLAN**

Who, What, Where, How and Data Collection:

**Review available resources and select at least two self-assessment fidelity measures for the team to review and make a final decision**

- Who: Ms. Pierce and Dr. Newell
- By When: 10/15/2019

**Mentor self-assessment survey fidelity tool**

**Start 11/1/2019 – End 12/05/2019**

- What tool/s: Mentor Self Assessment Survey
- Why is this important: To ensure that students who qualify have access to high quality mentoring services
- Who will collect the information? Mentors will complete the self-assessment survey weekly and email them to the Mentor Coordinator
- Who will collect the self-assessment surveys? By When? The Mentor Coordinator will collect the assessments monthly and ask mentors if the survey was practical and easy to complete
- Mentor Coordinator will assess the accuracy of the measurements based on completion
- Dr. Franco, the attendance specialist, will continue to collect attendance data on the mentees and bring to the next meeting
- Mr Leary, the data analyst will bring student outcome data to the next meeting

**Next team meeing 12.10.2019**

Analyze data to determine if the measurement is successful as measured by improvements in student outcome data and high fidelity scores on the mentor self-assessment survey

**DO**

Carry out the change or test and collect data.

- Mentors working overtime therefore increasing cost of program implementation
- Mentors not completing the fidelity assessments each week
- Had to return to some online mentoring sessions vs. all being in person to accommodate hybrid learning schedules
- Attendance of some mentees at sessions dropped

**STUDY**

Analyze and summarize data (quantitative and qualitative).

**Celebrations (What went well):**

- Despite shift to some virtual mentoring sessions, most mentees attended all sessions (7 students attended 90% of sessions – 1 student attended 75% of sessions – 1 student attended 60% of sessions)
- Mentors report feeling successful with high rates of fidelity on those that were completed

**Opportunities (What could be improved):**

- Improve student outcomes – raise grades and attendance and lower numbers of behavior incidents
- Increase the number of fidelity assessments completed

Cycle Number 1

**STUDY**

Analyze and summarize data (quantitative and qualitative).

**Questions/Concerns:**

- With fidelity as high as reported, student outcomes should be improving
- Can fidelity data be accurate? Is there enough data given the number of incomplete assessments to draw any conclusions? Mr. Leary urges the team to interpret the results with caution. Dr. Metz encourages a root cause analysis for further study as to why the program is not resulting in the desired outcomes.

**5 Whys**

**Problem statement: The M&M program is not demonstrating the expected student outcomes**

1. Why? Unsure the program is being implemented as intended
2. Why? Fidelity data has not been accurately collected
3. Why? There was not enough time to complete the data
4. Why? Mentors were unclear as to how to complete the fidelity data, so it was taking a long time to assess
5. Why? Mentors were unclear about the core components of the mentoring program

**ACT**

Document what was learned and plan next cycle.

**Decisions:**

- Team comes to consensus that the fidelity assessment process should be adapted

**Adaptations:**

- Add follow-up program coordinator surveys with two components (rationale: mentors may be struggling to self assess fidelity accurately based on knowledge of the tool and/or program)
  - Brief Observation (10 minutes) of mentor sessions
  - Formalized questions about the practicality and efficiency of the tool
- Review how to complete the mentor self-assessment survey with the mentor
  - Do not expand the number of mentor/mentee pairs at this time

Cycle Number 2

**PLAN**

Who, What, Where, How and Data Collection:

**Plan: Changes to mentor self-assessment**

**Who:** Mentors continue to complete the mentor self-assessment survey

**Who:** Dr. Newell and Dr. Ward

**What:** An asynchronous virtual 'booster session' around the completion of the fidelity measure

**Tasks/Tools:**

- Dr. Ward to complete a powerpoint with notes by 1.07.20
- Dr. Newell to record in VoiceThread by 1.15.20

**By When:** 1.15.2020

**Where:** Posted on the district learning management system and link emailed to mentors

**Plan: Addition of program coordinator survey**

**What information is important to collect?**

- Brief (no more than 10 minute) observations of mentor/mentee sessions to capture critical components
- Observation should include evidence of the following over time:
  - Focus was always on academics and school success.
  - Often communicated relevance of education and learning to future endeavors.
  - Created a caring and supportive learning environment.
  - Helped students with personal problems.
  - Practiced problem-solving and capacity building strategies through the use of the 5-step problem solving process.
  - Facilitated the setting of short and long term goal with students.
  - Demonstrated persistence and consistency in relationships with mentees and their families.
  - Addressed the concerns of the mentees and their families.
- Questions to mentors around the acceptability of the mentor self-assessment survey

**Why is this important to collect?**

- Ensure the M&M program is being implemented as intended
- Validation of mentor self-assessment scores
- Assess ease of use of self-assessment tool
- Determine any training and/or coaching needs for mentors

**Who will collect the information?**

- Dr. Newell, the Lead Program Coordinator, will collect from other coordinators

**Who will analyze the information?**

- Dr. Franco, the attendance specialist, will continue to collect attendance data on the mentees and bring to the next meeting
- Mr. Leary, the data analyst, will bring student outcome data to the next meeting as well as analyze the fidelity data

**When will the information be collected?**

- Coordinators will collect a random sampling of mentor observations weekly until all mentors have been observed/surveyed
- Collection window: 1.15.2020 – 2.15.2020

Cycle Number 2

**PLAN**

Who, What, Where, How and Data Collection:

**Where:**

- All mentor self-assessments and program coordinator surveys will now be entered into database. Data will be collected and extracted by Mr. Leary for analysis

**How (includes tools/tasks):**

- Ms. Southerland, Ms. Farmer, and Ms. Thomas will co-create a fidelity observation checklist using the criteria outlined above. Team will review and provide feedback. Tool should be released for use by 1.15.2020

**Next team meeting: 2/15/2020**

**DO**

Carry out the change or test and collect data.

**Notes:**

- Plan carried out as intended with no reported barriers
- Timeline considered holiday break

**STUDY**

Analyze and summarize data (quantitative and qualitative).

See linked [data report](#) from Mr. Leary

**Celebrations:**

- Mentor self-assessments and program coordinator surveys revealed comparable data – increasing reliability of assessments
- Fidelity ratings appear more accurate
- Despite holiday break, students/mentors continued to meet with required frequency

**Opportunities:**

- Need for increased number of completed mentor self-assessment surveys
  - While the completed assessments revealed a more accurate picture of the fidelity of implementation, fidelity assessments were still not all completed
- Increasing accuracy reveals fidelity not as high as originally thought
- Student outcome data is still not improving

**Questions/Concerns:**

- Still not at consistent fidelity scores (anticipated we would be at this point in implementation) therefore unable to ascertain if our prediction/hypothesis is correct
- Mentors continue to express frustration over the demands of the data collection process and meeting the needs of the mentees
- Some mentors continue to put in overtime to complete data paperwork
- Are mentors spending too much time with mentees in non-structured activities (good for relationship building but beyond the scope of the program) leaving less time for data collection demands?
- Ms. Southerland wonders if mentors are struggling to complete the mentor self-assessment survey in a timely fashion and/or spending more time with mentees because they are still not clear as to what the program components "look like"

**ACT**

Document what was learned and plan next cycle.

**Decisions:**

- Team comes to consensus that mentors need additional training in the program components with ideas for specific activities/strategies for mentee meetings
- Team agrees to continue with the mentor self-assessment and program coordinator surveys as developed, but add the additional training
- Team agrees to not expand to additional mentors/mentees at this time

Cycle Number 3	
<p><b>PLAN</b></p> <p>Who, What, Where, How and Data Collection:</p>	<p><b>Plan:</b>  <b>What:</b> Develop and deliver two booster sessions on the program components of the M&amp;M program  <b>Who:</b> One session will be provided by program developer; Session 2 to be provided by Ms. Pierce  <b>When:</b> Session 1 – 2.25.20; Session 2 – 3.07.2020  <b>Where:</b> Central Office conference room (Dr. Ward to reserve)  <b>How/materials:</b> Purveyor to provide booster session materials</p> <p><b>What:</b> Schedule and plan for monthly mentor community of practice  <b>Who:</b> Mentors, Program Coordinators, Ms. Farmer  <b>When:</b> the 3rd Friday afternoon of the month  <b>Where:</b> HS library  <b>How/materials:</b> Ms. Farmer to facilitate and gather needed materials, mentors to generate a list of topics/concerns/common issues for discussion and problem solving</p> <p><b>Plan for data collection to continue as outlined in Cycle 2</b></p> <p><b>Booster Session data:</b>  <b>What:</b> Booster Session evaluations  <b>How:</b> Common exit survey (Square, Circle, Triangle) One thing that squares with my understanding of my role; Something still circling around in my head; Three ideas or key learnings from today's lesson  <b>Why:</b> Assess learning and plan for ongoing learning and problem solving  <b>Who:</b> Ms. Pierce to collect and analyze and give to Ms. Farmer for planning monthly COP</p> <p><b>Community of Practice (COP) data:</b>  <b>What:</b> COP evaluations  <b>How:</b> Plus/Delta table at the end of each meeting with the following questions (Y/N/So-so)  <ul style="list-style-type: none"> <li>• This meeting was an effective use of my time</li> <li>• This meeting provided learning that addressed issues or needs relevant to my job as mentor</li> <li>• This meeting provided adequate resources and/or tools for use with issues or needs relevant to my job as mentor</li> </ul> <b>Why:</b> Efficacy of COP and planning for ongoing learning and problem solving  <b>Who:</b> Dr Newell to collect and analyze data at the end of each meeting (when) and (where) store in common data folder provided by Mr. Leary</p> <p>Next team meeting: 3.31.2020 (delayed to give time for more than one COP and both booster sessions)</p>
<p><b>DO</b></p> <p>Carry out the change or test and collect data.</p>	<p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• Completed by 3.25.2020</li> <li>• Boosters sessions completed – one held virtually due to weather</li> <li>• Both COPs were held. The second was virtual due to weather</li> </ul>

Cycle Number 3	
<p><b>STUDY</b></p> <p>Analyze and summarize data (quantitative and qualitative).</p>	<p>See linked <a href="#">data report</a> from Mr. Leary.</p> <p><b>Celebrations:</b></p> <ul style="list-style-type: none"> <li>• Fidelity ratings trending upwards</li> <li>• Booster session and initial COP data were very positive</li> <li>• Mentors are feeling more successful per self report</li> </ul> <p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Student outcomes are improving but still not where predicted</li> </ul> <p><b>Questions/Concerns:</b></p> <ul style="list-style-type: none"> <li>• At this point, the data is not aligning with predictions. The team hypothesized that as fidelity improved, so too would the student outcomes.</li> <li>• Concerns of team that mentors/mentees/school will want to abandon the program due to limited outcomes.</li> <li>• Dr Metz reminds the team we have not sought input from the mentees and perhaps this would give us more information as to why the outcomes are limited.</li> </ul>
<p><b>ACT</b></p> <p>Document what was learned and plan next cycle.</p>	<p><b>Decisions:</b></p> <ul style="list-style-type: none"> <li>• Continue with booster session every 6 months in addition to the monthly COPs</li> <li>• Continue with mentor self-assessments and program coordinator surveys as planned to assess fidelity</li> <li>• Team agrees to adapt fidelity process by conducting survey of mentees</li> <li>• Team agrees to not expand to additional mentors/mentees at this time</li> </ul>



Cycle Number 4

**PLAN**

Who, What, Where, How and Data Collection:

**Plan:**

Plan for data collection of mentor self-assessments and program coordinator surveys continue outlined above

**Plan for booster sessions/ COPs continue as outlined above:**

- Booster sessions to be scheduled for Summer and January of each academic year
- COPs to be scheduled monthly by the Lead Program Coordinator – schedule to be released by end of April for remainder of year and next academic year.
- Topics will continue to be co-created by coordinators and mentors

**Plan for new data collection (mentee survey):**

**What:** Survey of mentees

**Why:** Team agrees that there are several reasons why this data is critical for collection.

- An important part of understanding fidelity and outcomes is measuring participant responsiveness
- For equitable implementation of practices and particularly intervention, the beneficiaries of the practices should have opportunities to provide feedback to ensure we are focused on self determined needs and wants vs. solely on what the team perceives as a need
- Adding this data point will triangulate with other two assessments to get the clearest picture of what the mentor/mentee sessions 'look like'

**Who:** Team will co-create survey; Dr. Newell will collect from mentees

**Who will analyze:** Mr. Leary

**Where:** Common data folder with other surveys

**When:** Monthly – first to be completed by 4.24.2020

**Tasks/Tools:** Co-created mentee survey. Note: teams asks about feasibility of students in Career and Tech developing an app for the survey for next year

**DO**

Carry out the change or test and collect data.

**Notes:**

- Data collected with mentees as planned
- Coordinator had difficulty collecting from some of the students – consider more lead time or more engaging way in which to collect the data
- More of the mentor self-assessment surveys are being completed on time

Cycle Number 4

**STUDY**

Analyze and summarize data (quantitative and qualitative).

Team reviewed data report from Mr. Leary.

**Celebrations:**

- Mentees are overall positive about the mentoring session
- Students perceive benefits from sessions and would like more frequent sessions

**Opportunities:**

- Time for greater frequency of sessions – students feel as if they would be “doing better” (especially with grades) if they had more time to mentors to “help me get organized”
- Questions of feasibility of mentor self-assessment surveys reveal ongoing frustration with amount of required data collection

**Questions/Concerns:**

- Do we have funding resources to increasing mentoring time? Are there ideas the mentors might offer for increasing mentoring time? Program Lead to check in with mentors at the monthly COP
- Are the mentors really spending too much time on data? Are they cutting into session time in order not to submit overtime?
- Ms. Thomas asks: Can we review the mentor self-assessment survey to see if there are too many questions. Can some questions be removed while still gathering the needed information? Can we revise them and still get a clear picture of fidelity?

**ACT**

Document what was learned and plan next cycle.

**Decisions:**

- Continue with mentee surveys – Ms. Southerland will reach out to Career and Tech Ed to examine feasibility of app creation
- Continue with program coordinator surveys and fit and feasibility questions
- **Adapt** the mentor self-assessment survey by revising some of the questions and eliminating others. Mr. Leary, Ms. Pierce, and Dr. Newell will revise by end of week. There was agreement that there was too many as the questions perhaps mirrored the practice profile too closely.
- **Adapt** the data collection schedule to be less frequent
- Agreement to not expand the number of mentor/mentee partners until the data begins to show positive impact

Cycle Number 5

**PLAN**  
Who, What, Where, How and Data Collection:

**Plan:**  
**What:** Mentor survey revised/schedule of data collection revised  
**Who:** Mr. Leary, Ms. Pierce, and Dr. Newell  
**By When:** 05.01.2020

**What:** Training to mentors on new survey and schedule  
**Who:** Dr. Metz  
**By when:** At the May COP  
**Needed tools:** Revisions from team, data collection calendar

**Plan for revised surveys:**  
**What:** Revised data collection schedule and surveys  
**Why:** Reducing data burden on the mentors so that they will have more time to spend with mentees. Additionally, reducing the burden makes it more likely the mentor self-assessment surveys will be completed with accuracy  
**Who will collect the new data:** Dr. Newell  
**Who will analyze the new data:** Mr. Leary  
**Where:** Data collection common folder  
**When:** Data is now collected twice per month vs. weekly  
**How:** Continue with online Google form survey

**DO**  
Carry out the change or test and collect data.

**Notes:**

- Plan carried out as described
- Mentors anecdotally expressing appreciation for being heard and for the persistence in problem-solving the concerns
- Spring break precluded some data collection so timeline pushed back a week

**STUDY**  
Analyze and summarize data (quantitative and qualitative).

Team reviewed data report from Mr. Leary.

**Celebrations:**

- Fidelity improving per mentor self-assessments and program coordinator surveys
- Mentees self report feeling more successful and data corroborates this
- Mentors feel more successful with data collection processes
- Mentors report feeling heard and supported

**Opportunities:**

- None at this time

**Questions/Concerns:**

- None at this time

**ACT**  
Document what was learned and plan next cycle.

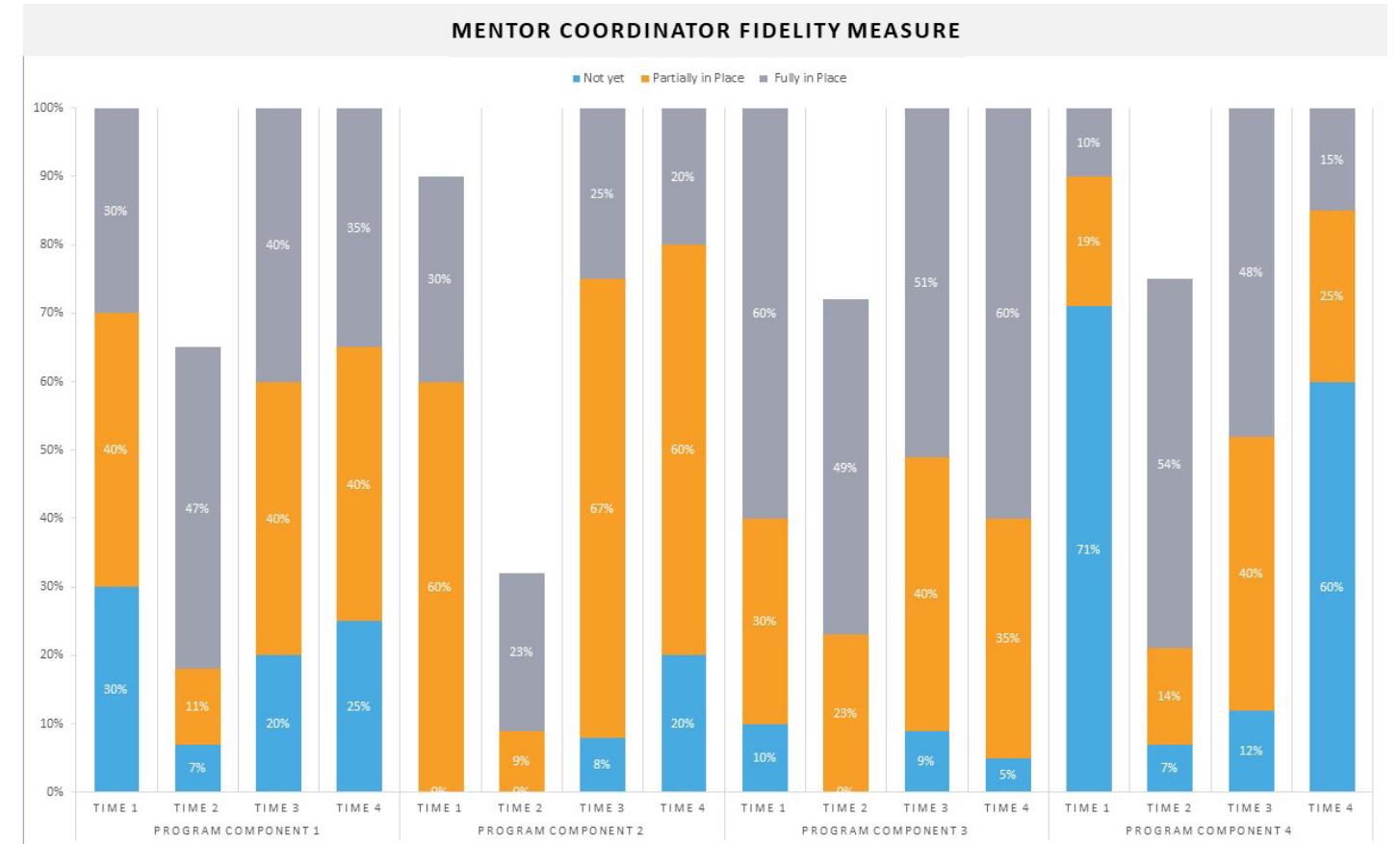
**Decisions:**

- Adopt** the mentorself-assesment and program coordinator surveys as fidelity assesments of M&M
- Continue** with booster sessions and monthly COPs for mentors
- Continue** to progress monitor data and problem solve student concerns as needs arise
- Expand** number of participating mentees by three

Appendix Cycle 2 Data Report

Coordinator Fidelity Measure				
		Not yet	Partially in Place	Fully in Place
<b>Program Component 1</b>	Time 1	30%	40%	30%
	Time 2	7%	11%	47%
	Time 3	20%	40%	40%
	Time 4	25%	40%	35%
<b>Program Component 2</b>	Time 1	0%	60%	30%
	Time 2	0%	9%	23%
	Time 3	8%	67%	25%
	Time 4	20%	60%	20%
<b>Program Component 3</b>	Time 1	10%	30%	60%
	Time 2	0%	23%	49%
	Time 3	9%	40%	51%
	Time 4	5%	35%	60%
<b>Program Component 4</b>	Time 1	71%	19%	10%
	Time 2	7%	14%	54%
	Time 3	12%	40%	48%
	Time 4	60%	25%	15%

Mentor Self Assessment: Fidelity Met 3 out of 5 Times (yes or no)	
	Overtime
<b>Mentor 1</b>	No
<b>Mentor 2</b>	Yes
<b>Mentor 3</b>	No
<b>Mentor 4</b>	No
<b>Mentor 5</b>	Yes



Appendix Cycle 3 Data Report

Coordinator Fidelity Measure				
		Not yet	Partially in Place	Fully in Place
<b>Program Component 1</b>	Time 1	30%	60%	30%
	Time 2	10%	40%	50%
	Time 3	10%	30%	60%
	Time 4	10%	15%	75%
<b>Program Component 2</b>	Time 1	10%	50%	40%
	Time 2	5%	60%	35%
	Time 3	5%	40%	55%
	Time 4	20%	20%	60%
<b>Program Component 3</b>	Time 1	10%	30%	60%
	Time 2	0%	40%	60%
	Time 3	5%	25%	70%
	Time 4	0%	30%	70%
<b>Program Component 4</b>	Time 1	30%	30%	40%
	Time 2	10%	35%	55%
	Time 3	5%	50%	45%
	Time 4	15%	40%	45%

Mentor Self Assessment: Fidelity Met By Program Component (Average over Time)				
	PC 1	PC 2	PC 3	PC 4
<b>Mentor 1</b>	Yes	No	Yes	Yes
<b>Mentor 2</b>	Yes	No	Yes	Yes
<b>Mentor 3</b>	No	No	No	Yes
<b>Mentor 4</b>	Yes	No	Yes	Yes
<b>Mentor 5</b>	Yes	Yes	No	No

MENTOR COORDINATOR FIDELITY MEASURE

