

# Rooted and Rising

Pregnant People & Children Action  
Community

May 2026 Virtual Meeting



***As you get settled...***

- **Rename yourself** to include your name and center

# Today's Gathering

- 01 Small Scale Tests: PDSA Refresher
- 02 Peer to Peer Learning
- 03 Looking Ahead to June SWLS and Action Period 2

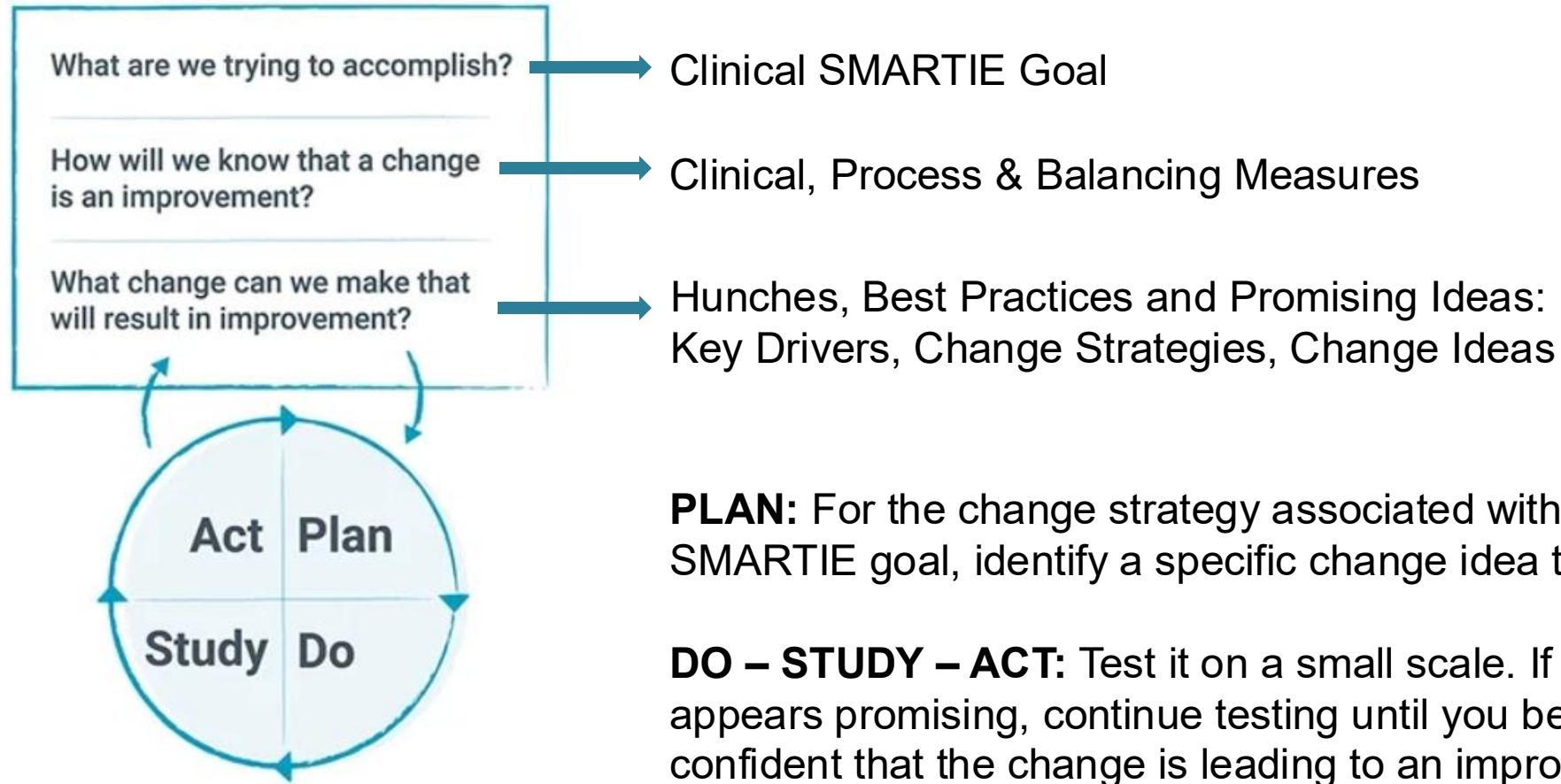
# Small Scale Testing: Using PDSAs to Advance Clinical Goals

# PDSA Temperature Check

As a community, let's get a sense of how we feel about and what our familiarity level is with PDSAs.



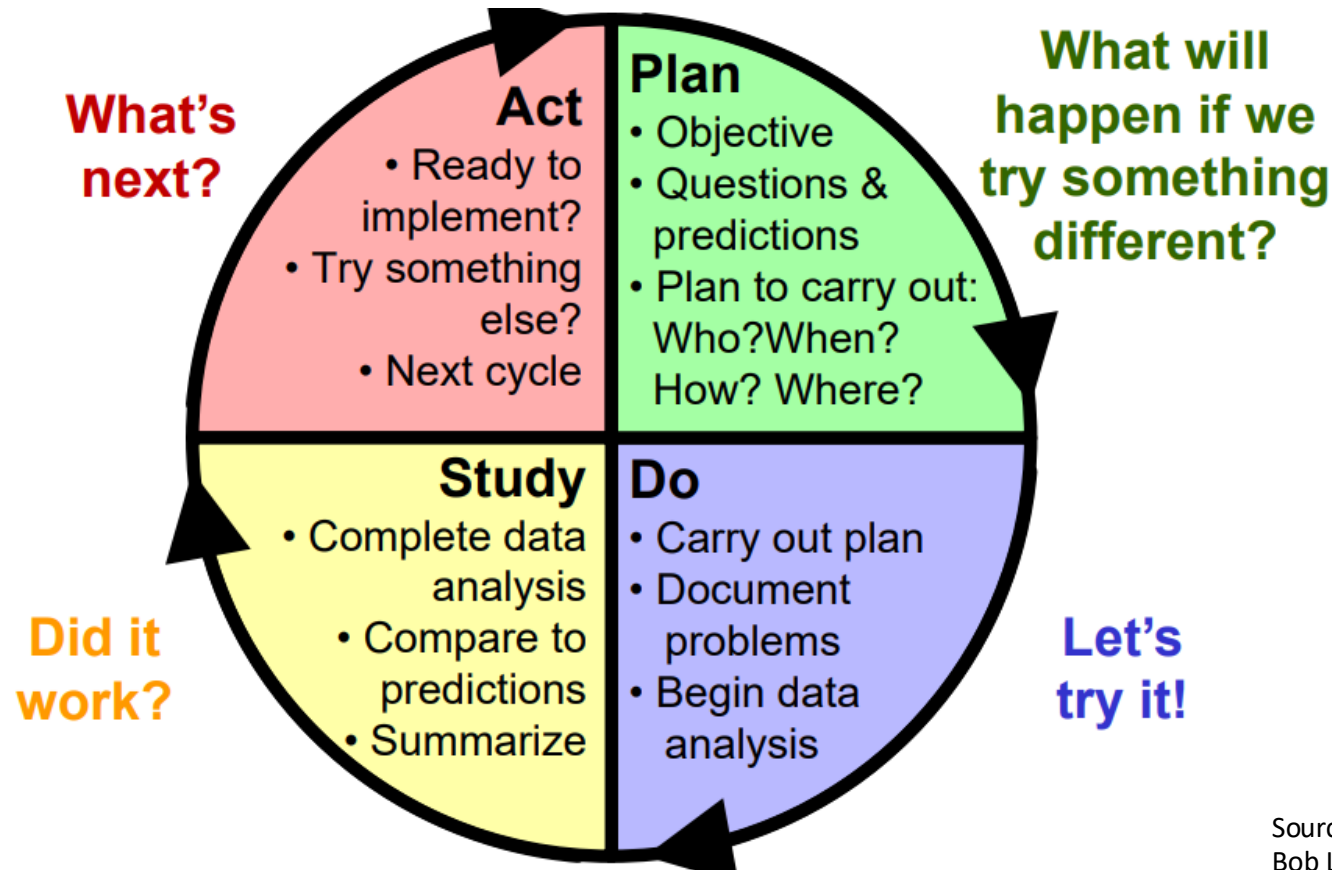
# Model for Improvement



Source: Adapted from The Improvement Guide (2009)

# The PDSA Cycle

## How We Learn and Improve



Source: Institute for Health Care Improvement  
Bob Lloyd et al, May 2017

## Deciding on the Scale of the Test

|                                                                 |                       | CURRENT LEVEL OF COMMITMENT WITHIN ORGANIZATION |                              |                              |
|-----------------------------------------------------------------|-----------------------|-------------------------------------------------|------------------------------|------------------------------|
|                                                                 |                       | NO COMMITMENT                                   | SOME COMMITMENT              | STRONG COMMITMENT            |
| Low degree of belief that change idea will lead to Improvement  | Cost of failure large | <i>Very small-scale test</i>                    | <i>Very small-scale test</i> | <i>Very small-scale test</i> |
|                                                                 | Cost of failure small | <i>Very small-scale test</i>                    | <i>Very small-scale test</i> | <i>Small-scale test</i>      |
| High degree of belief that change idea will lead to Improvement | Cost of failure large | <i>Very small-scale test</i>                    | <i>Small-scale test</i>      | <i>Large-scale test</i>      |
|                                                                 | Cost of failure small | <i>Small-scale test</i>                         | <i>Large-scale test</i>      | <i>Implement</i>             |

# Techniques to Create an Effective Test

1

Involve the team in developing a test and making a prediction

2

Test with volunteers who are motivated and interested

3

Make sure test is narrowed to one change idea... otherwise it's hard to know what is working.

4

Do not try to get buy-in, consensus, etc.

5

Collect useful data during each test

# Measurement and Data Collection During PDSA Cycles

- Collect *useful* data, *not perfect* data - the purpose of the data is learning, not evaluation
- Use qualitative data (feedback) rather than wait for quantitative
- Record what went wrong during the data collection
- Use a pencil and paper until the information system is ready
- Use sampling as part of the plan to collect the data

## PHM INITIATIVE

## PDSA WORKSHEET (EXAMPLE)



Name of Clinic Team: Verdant Valley Health

Test Period: May 1-15, 2026

Overall Test Objective: Schedule more appointments through targeted phone outreach.

Clinical Goal this Test Supports: Increasing # of children w 6 well child visits completed for children 0-15 months

Population of Focus: Children

Change Strategy: Targeted Outreach

Process Measure: # of patients w 2 or more WCV appts scheduled

**PLAN:**

**1. Briefly describe the test:** Develop and study a small-scale phone outreach for eight kids w/out a scheduled appointment for the three month and six month well child visit.

| 2. List the tasks necessary to complete this test (What)                      | Person responsible (Who) | When     | Where          |
|-------------------------------------------------------------------------------|--------------------------|----------|----------------|
| Run a report of kids w/out a scheduled appt for the 3 and 6 mo visit          | Janice                   | By May 1 | Relevant       |
| Augment script for phone call outreach that includes the importance of visits | Implementation Team      | By May 1 | Team meeting   |
| Conduct phone call outreach, calling in AM, lunch and PM                      | Charlotte (MA)           | May 2-10 | Nurses Station |
| Track outreach and review at next PHMI team meeting.                          | Charlotte (MA)           | May 15   | Registry       |

**3. What do you predict will happen?** 50% will be successfully reached. Of those reached, all will schedule 3 and 6 months appts. We will learn whether parents are willing to schedule appointments in the more distant future.

**4. What data will be collected to indicate whether this change led to improvement?** Janice will create a tab in our registry, "outreach test" and keep a list of patients/caregiver name, type of outreach, date of outreach, outcome of outreach attempt (reached, left message, # of callbacks, etc), appointment made yes or no, date of appointment and comments/notes to capture parent responses.

**DO: Carry out the planned test of change. Collect data; describe observations and problems encountered.**

Test was carried out for the 8 kids identified in the report:

- 6 unanswered where I left voice message for call back
- 4 returned the call and scheduled 3 and 6 mo visits.
- 2 picked up and made 3 mo appts. Both calls with pickups were when I reached out mid-morning. Neither parent willing to schedule 6-month appt, "too far out"
- 1 did not return the call; 1 phone # had been disconnected.

**STUDY: What did you learn? Analyze data, observations, problems encountered and determine next steps. How do results compare with your prediction?**

We exceeded our prediction re: number we reached (6 out of 8). We believe our script adequately stated the importance of scheduling these visits. We were surprised regarding the 6 month 'pushback'; we're not ready to change our mind about scheduling 6 months out. We believe there is more we can learn and want to repeat this test for another 8 kids for the next two weeks. We decided we will not call back after 2 messages this next round.

**ACT: Adapt, adopt or abandon?**

- ☐ **Adapt:** Modify the change and continue testing plan
- ☐ **Adopt:** Select changes to implement on a larger scale and develop an implementation plan and plan for sustainability
- ☐ **Abandon:** Discard this change idea and try a different one

## Coach Reflections

### Breakout Room

1

(Children)

Saban

Santa Rosa

Eisner

### Breakout Room

2

(Pregnant People)

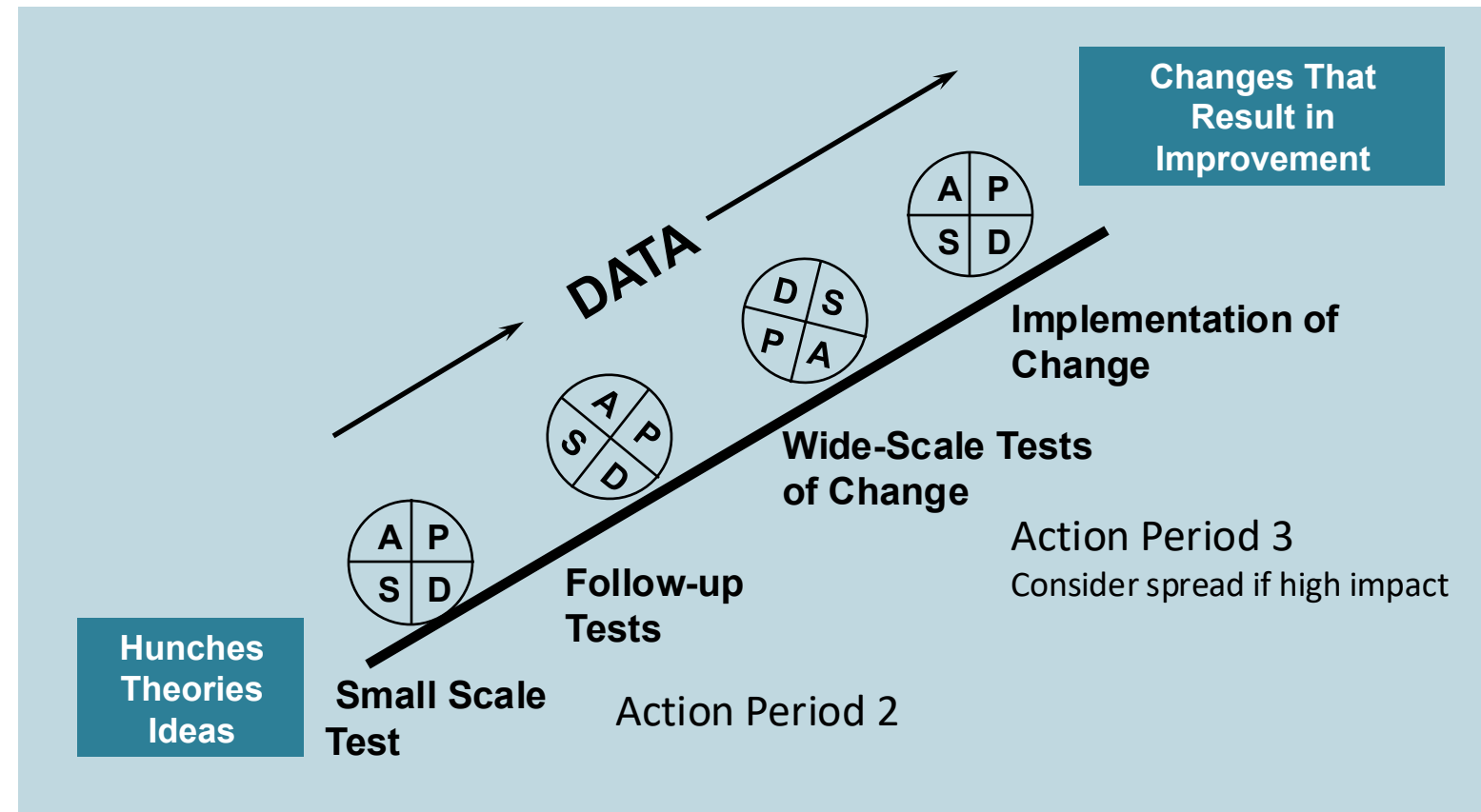
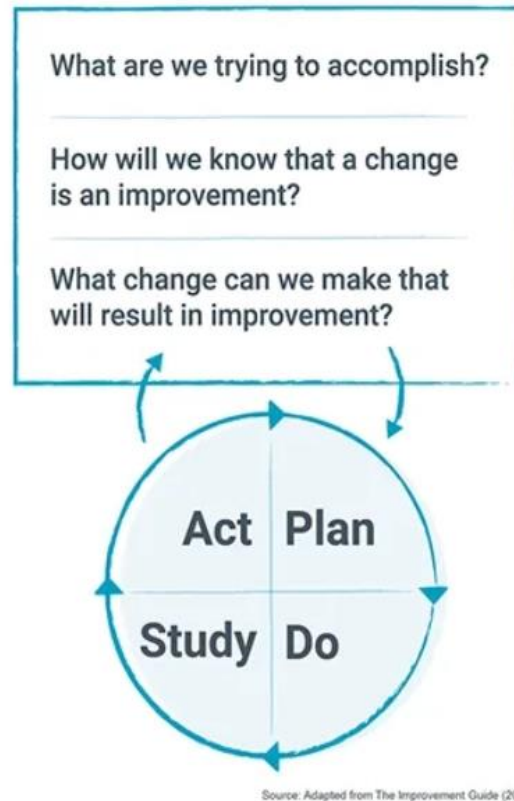
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Open Door

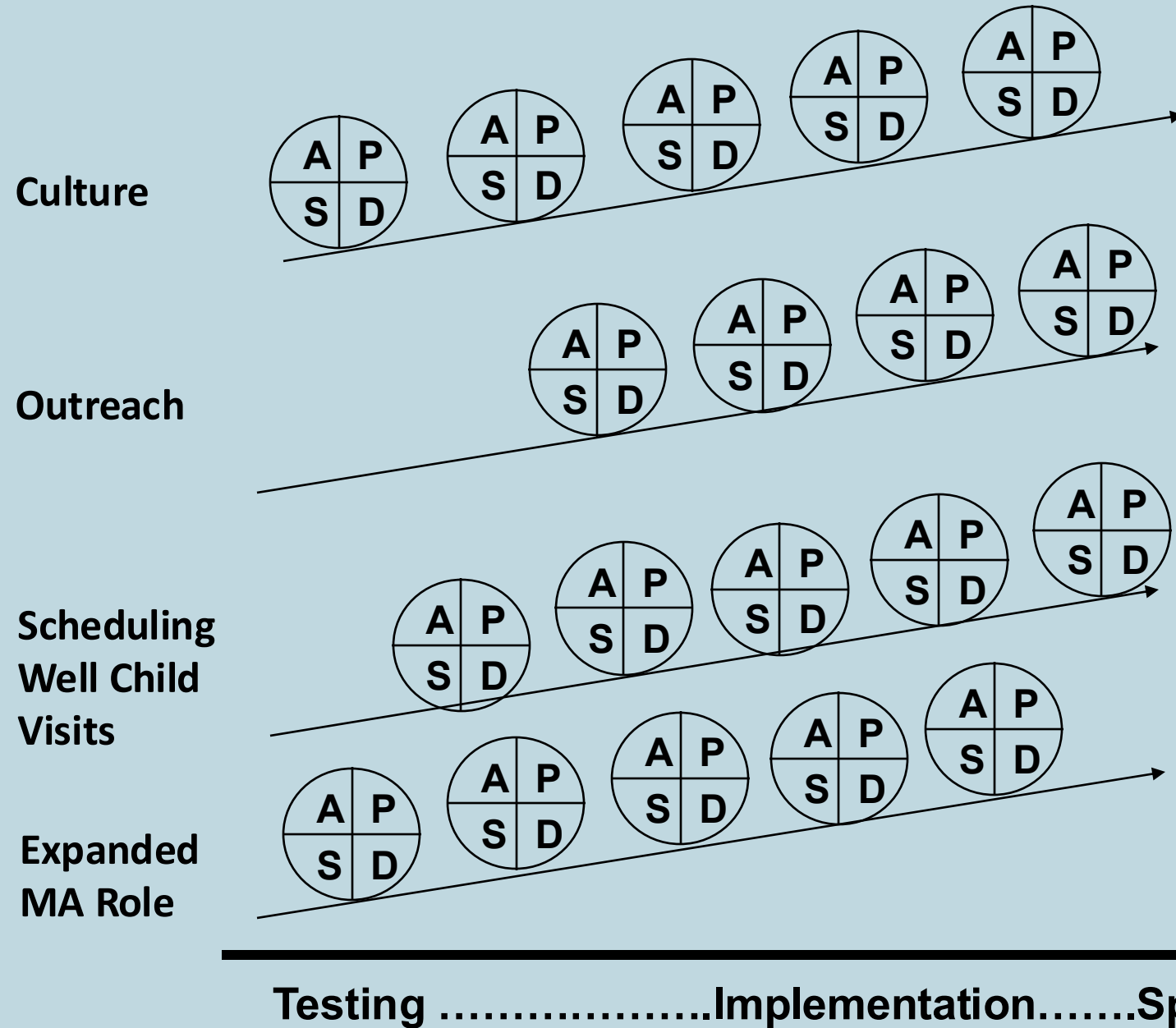
# Pulse Check



# PDSAs: Multiple Test Cycles



# PDSA Testing in Parallel



**Aim:**  
Increase well  
child visits  
by 5% in 2026

## Action Period 2: April – June

### April

- Finalize measures/collection process for clinical goals
- Start PDSA testing

### May

- Data collection for clinical goals
- Start/continue PDSA testing and document using worksheet

### June

- Data collection for clinical goals
- Establish data reporting to reflect clinical measures
- Prepare for Leadership Quarterly Review
- Continue PDSA testing and create annotated run charts
- Virtual SWLS: June 23-24
- Hold first Leadership Quarterly Review
- Adjust implementation plans based on LQR feedback



## PHM INITIATIVE

## PDSA Worksheet

Center/Location of Test:

Overall Objective: (add the SMARTIE goal associated with this test)

Population of Focus:

Change Strategy:

Testing timeframe:

Process Measure:

**PLAN:**

1. Briefly describe the test:

| 2. List the tasks necessary to complete this test (What) | Responsible (Who) | When | Where |
|----------------------------------------------------------|-------------------|------|-------|
|                                                          |                   |      |       |
|                                                          |                   |      |       |
|                                                          |                   |      |       |
|                                                          |                   |      |       |
|                                                          |                   |      |       |

3. What do you predict will happen?

4. What data will be collected to indicate whether this change led to improvement?*(just enough data for this test, consider manual collection)***DO:** Carry out the planned test of change. Collect data; describe observations and problems encountered.**STUDY:** Analyze data, observations, problems encountered. How do results compare with your prediction?**ACT:** Select next step:
☐
**Adapt:** Modify the change and continue testing.  
Plans/changes for next test:
☐
**Adopt:** Select changes to implement on a larger scale and develop an implementation plan and plan for sustainability
☐
**A band on** Discard this change idea and try a different one

Access the  
PDSA  
worksheet  
[here!](#)

# June SWLS Preparation

Pre-work coming soon!

# Resources and Links



## Cohort Portal

### Rooted and Rising Living Storyboards

[Pregnant People Change Package](#)  
[Pregnant People Implementation Guide](#)

[Children Change Package](#)  
[Children Implementation Guide](#)

Live Now!

  
**Cohort Portal**  
**Directory**

**Action Communities**  

All

**Community Health Centers**  

All

**PHMI Roles**  

All

Q

Search Participa

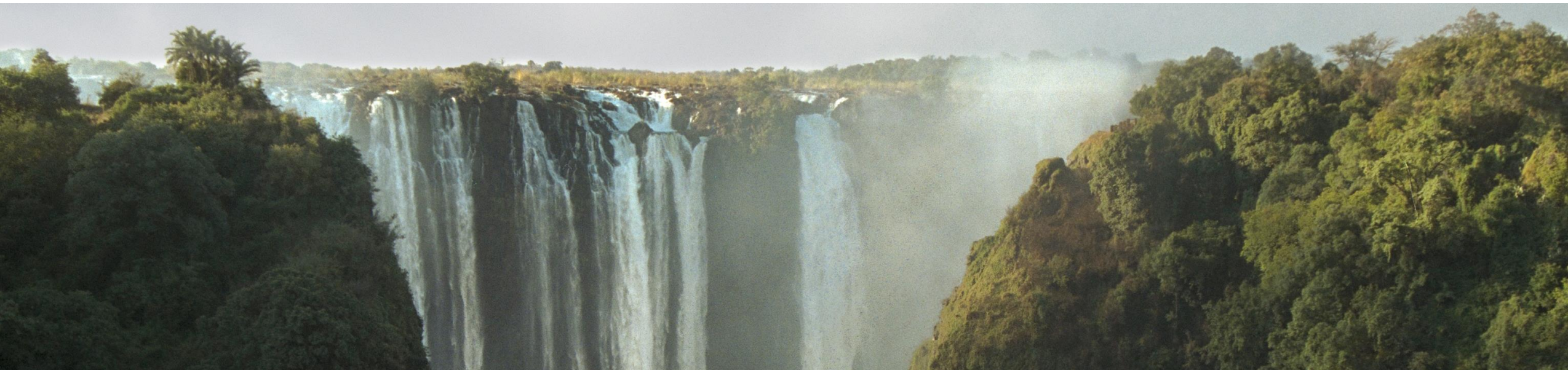
✕ Clear all filters

| Participant Name | Title | Organization | Email |
|------------------|-------|--------------|-------|
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# Reflection Cascade

Identify one word or phrase that captures a learning or feeling around participating in today's call.

Type the word/phrase into the chat box ***but wait until we signal to hit 'send'.***



Thank You!

