

Activity: Choosing Measures for Improvement

Overview

Having the right evidence on hand at the moments when you have to make important decisions is critical to leading your team towards your aim. Once your team has arrived at the point where you are beginning to test changes to practice, it becomes necessary to think about how you will know if those changes are working. This activity leads your team through a structured brainstorming session to turn their working theory into predictions of how desired changes can be measured. From that brainstorming of potential measures, it becomes possible to prioritize evidence collection to meet your team’s needs and decision-making timeline.

Objective

Through a guided session of reflection and collaborative brainstorming, participants will create a list of embedded evidence to inform the measurement of the team’s progress.

Participants

- Improvement team leader
- Improvement team members

Participants

The team should have either:

- started testing change ideas (see Chapter 3 of the handbook), or
- set clear priorities for the drivers they plan to tackle first.

Materials

- A completed driver diagram, optionally in two versions:
 - A “reduced” version displaying only the change ideas and drivers you are currently working on or will be adding in the near future. It should look like a horizontal row of the “full” version that connects the aim statement to the current change idea, although all drivers impacted by the current work should be included. See examples throughout this chapter. It should be displayed on a white board or chart paper with space for adding sticky notes.
 - (Optional) A “full” version with all drivers and change ideas included.

continued on next page

Activity: Choosing Measures for Improvement *page 2*

- Small sticky notes or stickers (or other props for distributing and counting votes).
- (Optional) A copy of the *Data Collection Flowchart* (included here).
- (Optional) The list of criteria from the top of page 126, printed or on chart paper.

Guiding Questions

- How will we know if the changes we are making are an improvement?
- What would success look like?
- What evidence should I collect for immediate decisions, and what evidence should I plan to collect for judging longer-term progress?

Facilitation Notes

1. Introduction and Framing (5 minutes)

- Welcome your team and review the objective and guiding questions of the activity.
- Explain to your team that this session will build upon the work they have done creating a working theory of improvement (their driver diagram). That thinking will organize this session's work as the team determines potential data to collect and starts to prioritize among them.

2. Warm Up (5 minutes)

- Prompt participants to think of one example of data that they have found useful or informative.
- Quickly share what the kind of data was and give one reason why it was helpful to them.
- Thank participants for sharing and, if possible, name and recognize any diversity in the kinds of data that were shared.
- Explain that this activity will ask them to brainstorm a wide variety of data sources to track progress of a wide variety of learning, behaviors, processes, and norms. Ask them to be creative and not limit themselves to “traditional” data sources.
- Clarify for participants that the purpose of the data sources they will be talking about are not meant to be evaluative; instead, they should serve two purposes:
 - help them track the progress they want to make.
 - help them answer their questions or doubts.

3. Review Theory of Improvement (10 minutes)

- Tell participants that an important principal of good data use is that it is never ad hoc, but based on a clear theory of what we expect to happen. Remind them that they have already created that theory by making a driver diagram.

continued on next page

Activity: Choosing Measures for Improvement page 3

- (Optional) Show participants the “full” version of the driver diagram to remind them of the more holistic view of their theory of improvement, containing the elements that they are not currently working on, but could eventually.
- Check for clarifying questions about the content of the diagram.
- Place the part of your driver diagram you will be addressing (the “reduced” version described in the activity prerequisites) on chart paper, at the center of a table that can be accessed by all participants or drawn on a white board.

4. Define What Success Looks Like (15 minutes)

- Tell participants that they have finished with the grounding and are ready to get started.
 - Explain that the best way to measure for progress is to start from an idea of what success could look like, so the first step of the activity will involve collectively defining success, where they will see it, and how they will recognize it.
 - Draw participants’ attention to the driver diagram and explain that you are interested in all kinds and degrees of success, and that they should use the diagram to help them think about early and intermediate success as well as eventual goals.
- Break into pairs and brainstorm “look-fors” of success on sticky notes.
 - After brainstorming 5–8 ideas per pair, ask them to take turns placing “look-fors” on the corresponding location on the driver diagram. When similar ideas are named, group them together.
- Take a moment to review and ask participants to notice any kinds of data that they hadn’t thought of. Ask them to look for additional places on the driver diagram where similar data-collection strategies might be applied. Add new sticky notes for new ideas that come up.
- Take one final moment to check for anything that needs to be consolidated into groups and give participants a chance to make any final additions.

5. Selecting the Best Measures for Improvement (10 minutes)

- Tell participants that the purpose of this activity is not to start collecting every kind of data that has been named, but rather to use their brainstorming to select and prioritize the data that will be most helpful *over the next few months*. The rest of the ideas they have shared will be preserved as a “measurement system” that they will be able to refer back to when the work progresses to a place where more or different data is needed.
- Tell them that a final decision won’t be made today, but that their voice will be important in making it. The final step of today’s work will involve identifying a handful of measures that stand out from the rest as potentially beneficial to their improvement work.

continued on next page

Activity: Choosing Measures for Improvement *page 4*

- (Optional) Share the following criteria for strong embedded measures (based on the guidance of improvement science). Good data doesn't need to meet all of these criteria to be useful, but it can be useful to think about the value these bring:
 - **Embedded in daily work**, making it an easy lift to add to regular routines.
 - **Rapid**, providing instant or near-instant feedback for learning and improvement.
 - **Based on predictions**, exposing gaps in understanding and opportunities to learn by predicting results in advance.
 - **Informative**, revealing how a change is working, not just if it is working.
 - **Responsive**, capturing small changes to help chart progress and uncover who the change is helping and who it isn't (and, if possible, why).
 - **Yours**, owned by your improvement team and used in open, honest reflection aimed at improvement, not accountability.

Ask participants to quickly vote on 2–4 measures that they think are most important for guiding their improvement work in the short- and medium-term.

- If disagreements that aren't critical arise, tell participants that this list shouldn't be considered final and that you will note the disagreement for later discussion.

6. Closing (5 minutes)

- Collect all documents for your team's records. These will serve as foundations for future work.
- Share what you can about next steps for the team and yourself.
 - If they are continuing PDSA testing, issue a reminder about agreed timelines and meeting dates.
 - If you plan to discuss this with school leadership or use the *Data-Collection Planner* tool (in this chapter) to continue to think through the team's data-collection needs, mention that and if possible give a timeline.
 - Ask for interest in taking a more hands-on role in designing or working with data.
- Thank your team for their contributions.

Data-Collection Flowchart

