Carnegie Foundation
for the Advancement of Teaching

90-DAY CYCLE HANDBOOK

SANDRA PARK AND SOLA TAKAHASHI
CARNEGIE FOUNDATION FOR THE ADVANCEMENT OF TEACHING

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INTRODUCTION

90-Day Cycles[1] are a disciplined and structured form of inquiry designed to produce and test knowledge syntheses, prototyped processes, or products in support of improvement work. With any type of activity, organizations inevitably encounter roadblocks to improving performance and outcomes. These barriers might include intractable problems at particular junctures or complex issues affecting the entire system. In either case, 90-Day Cycles can serve as a mechanism for organizing existing knowledge or generating new ideas to address these thorny challenges.

The opening section of this handbook contains a broad overview of the purpose and essential characteristics of a 90-Day Cycle. There follows a discussion of the different processes involved in conducting a 90-Day Cycle, from the point of inception (pre-cycle), through the three phases of the cycle (scan, focus, and summarize), to next steps or uses for the product(s) of the 90-Day Cycle (post-cycle). In addition to a detailed analysis of the different steps, these sections include tips and examples to facilitate their execution. The handbook concludes with a description of the roles and responsibilities of participants in the 90-Day Cycle. Templates of cycle documents are also included.

**Note: The Carnegie Foundation for the Advancement of Teaching views 90-Day Cycles as a critical component of improvement work. New ideas and innovations generated through this process go through continued testing and refinement beyond the life of the cycle. We share this handbook more as an introduction to 90-Day Cycles (to be supported by coaching and experience with increasing responsibility for the process) as opposed to comprehensive and exhaustive preparation to engage in this type of inquiry.

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[1] The 90-Day Cycle process presented here is an adaptation of that used by the Institute for Healthcare Improvement (IHI). We would like to thank Lindsay Martin, Executive Director of Research and Development at IHI, for her coaching and support.

Purpose

90-Day Cycles are intended to support improvement efforts by contributing to the re-conceptualization of problems and the conditions that create them; prototyping possible processes, tools, or specific practices to address these problems; and testing them to gauge their potential efficacy. They serve as a device to advance ongoing improvement work and to build the organization's capacity and knowledge going forward. To this end, every 90-Day Cycle has an explicit aim, a defined audience, and an initial conception of its final product that will be used to guide or support improvement.

Users and Uses

90-Day Cycles deliver an internal product and a report to a product owner (p. 22)—be it a member of a Networked Improvement Community (NIC),[2] design/development groups within the NIC, design teams, or others—who has identified a particular problem or issue in need of innovative thinking. The product owner determines the ultimate use of the 90-Day Cycle product, which may be disseminated or implemented, depending on the type of innovation. The products of 90-Day Cycles are primarily intended for internal use, although they can be of benefit to outside audiences as well. In some circumstances, the products may be repurposed for dissemination as white papers, scholarly publications, technical notes, policy briefs, etc., aimed at external audiences.

Defining Characteristics

There are several defining features of 90-Day Cycles. All 90-Day Cycles:

- aim to prototype an innovation, broadly defined to include knowledge frameworks, tools, processes, etc.;
- leverage and integrate knowledge from scholars and practitioners (pp. 12-14);
- leverage knowledge of those within and outside of the field associated with the topic (p. 12-13);
- include initial "testing" of a product by at least one of several means (pp. 15-16);[3]

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[2] A Networked Improvement Community is a scientific learning community distinguished by four essential characteristics. It is:
   - *focused* on a well specified common aim,
   - *guided* by a deep understanding of the problem and the system that produces it,
   - *disciplined* by the rigor of improvement science, and
   - *networked* to accelerate the development, testing, and refinement of interventions; their more rapid diffusion out into the field; and their effective integration into varied educational contexts.

[3] A note about failure: At their core, 90-Day Cycles are designed to test new thinking or ideas. Simply put, they are a form of innovation. Inherent in all innovation is the prospect of failure. Given this, it is expected that some ideas will fail or not effect the change initially intended. At IHI, 30-40 percent of their 90-Day Cycles end in "failure." Failure is an inherent part of innovation; it generates important learning. In an improvement frame, early testing at a very modest scale keeps the cost of failure low and prevents the wider implementation of bad ideas.

- consist of three phases: (1) scan, (2) focus, and (3) summarize (pp. 12-18);
- begin and conclude within a span of 90 days and run in synchronization with other 90-Day Cycles organized into four, three-month waves during the year, to deliver needed knowledge in a timely fashion;
- are led by a team lead and supported by other team members and experts (pp. 21-22).

Product Types

The products of 90-Day Cycles can take various forms but tend to be of three primary types.

1. **Frameworks**, of which driver diagrams are the most common form, organize knowledge around a particular issue and represent a practical theory for achieving a specified outcome. A driver diagram consists of three key elements: an aim, primary drivers, and secondary drivers. The aim states the outcome an organization seeks to achieve in addressing a specific problem. The primary drivers are high-leverage processes, norms, and structures that, if improved, will move an organization closer to its aim. Secondary drivers are specific actions needed to move the primary drivers.

2. **Processes and tools** offer solutions to identified problems of practice and are used to ground improvement activity. Where no process exists, the first step in improvement is to design and implement one. The 90-Day Cycle serves as the ideal vehicle for the creation and initial testing of processes (e.g., a series of steps that makes delivery of a service run more efficiently) and tools (e.g., a survey that improves data collection) before they are tested more widely in a NIC.

3. **Specific changes to practices** may target a particular step that always breaks down in an existing process, or else focus on a discrete aspect of teaching (e.g., how best to introduce a math problem so that it stimulates productive struggle and effort in students).

The type of product or deliverable will influence various facets of the 90-Day Cycle, including the type of testing that will be conducted and the form of the final product. In addition, more complex and systemic problems may require a sequence of 90-Day Cycles sharing a common topic but each producing a different deliverable. For example, a 90-Day Cycle on understanding and framing a problem may lead to another 90-Day Cycle that tests a particular process addressing some particular facet of that problem.

90-Day Cycles, Scans, and Literature Reviews

A 90-Day Cycle is distinct from a scan of the field or a review of the literature base. While a 90-Day Cycle does include a scanning phase, a scan is not, by itself, a 90-Day Cycle. And while a 90-Day Cycle will include reviewing some existing literature, a literature review is also distinct from a 90-Day Cycle.

A scan is an inquiry activity in which information is gathered and synthesized from various sources. With a 90-Day Cycle, the inquiry does not end with the scan. The scan culminates in the development of a prototype, whether it is a framework or a process, which is then tested to determine its potential efficacy in an improvement effort.

A literature review synthesizes knowledge existing in print format, and it aims to be comprehensive about a particular topic. During the scan phase of a 90-Day Cycle, the team will review literature, but the aim is to gather and synthesize sufficient information about the problem to develop a framework or prototype, rather than be comprehensive in any scholarly or academic sense. (See pp. 12-14 for further discussion of the scan phase.)

Process
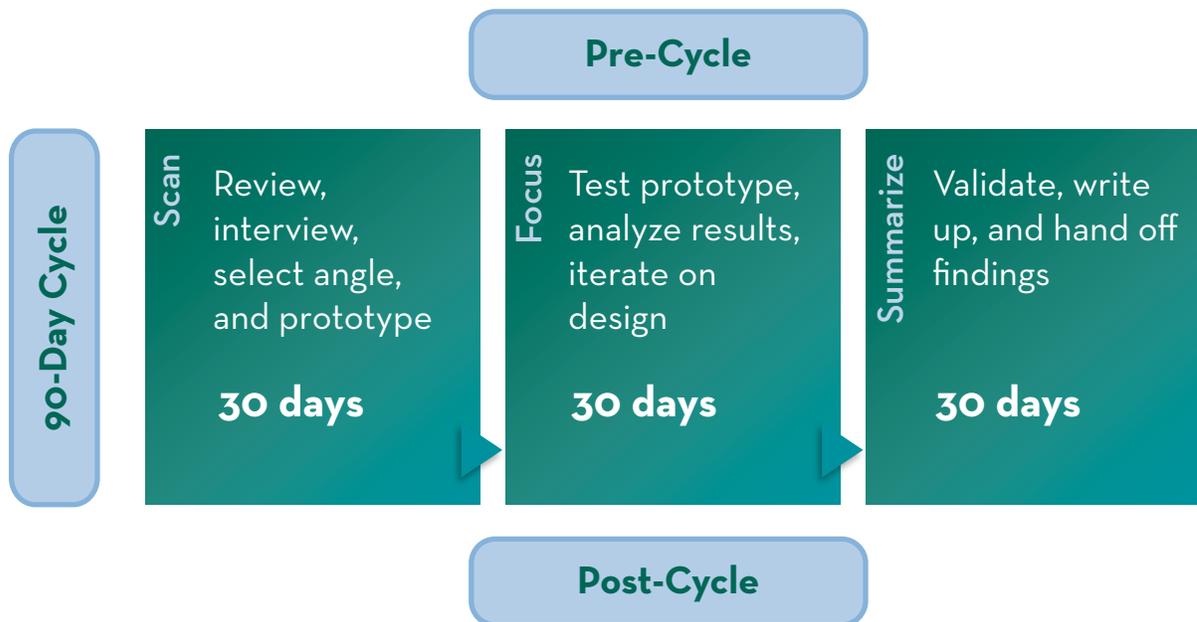
The 90-Day Cycle process occurs in three broad stages:

- **Pre-cycle:** Activities include topic and team selection, proposal and charter development, direction setting, and approval.
- **90-Day Cycle:** This stage is divided into three distinct phases, each characterized by its primary activity: scan, focus, and summarize.
- **Post-cycle:** Determinations are made regarding what happens to the results and products of the 90-Day Cycle once it is completed. This includes both direct use of the 90-Day Cycle as well as the development of additional products that repurpose the product.

Each stage and phase will be described in more detail in subsequent sections of the handbook.

PRE-CYCLE: PROPOSAL AND CHARTER

Preparation for a 90-Day Cycle is almost as important as the cycle itself. Choosing a topic of appropriate scope, identifying your audience, and articulating the deliverable before the cycle starts is critical to a cycle's success. Any ambiguity will slow down your progress during the cycle and quite possibly doom it to failure.

What should I consider when selecting a topic?

As stated earlier, topics for 90-Day Cycles should focus on "tough" problems that NICs seek to address and improve. These include:

1. Significant challenges that need new thinking;
2. Barriers that are difficult to remove;
3. Complex issues that if addressed will dramatically improve the outcomes of the NIC.

TOPIC SELECTION

TIP

Make sure your topic focuses on a clearly defined problem of proper scope. Be clear about audience and purpose. For whose benefit is the 90-Day Cycle being conducted (product owner) and what will it deliver (aim and outcome)? A good rule of thumb is to ask if you can develop a framework or tool and test it in 90 days. If not, chances are your topic is too broad or too narrow. You may choose to do a series of 90-Day Cycles on a particular topic if it is broad in scope or focuses on new areas of interest.

In selecting topics, consider the following sources:

1. **Members of the NIC:** What do they identify as important problems or issues to address?
2. **Data collected across the NIC:** What issues do the data reveal that should be addressed?
3. **Senior leaders:** What do they see as potential new lines of work to explore or processes and capacities needed at your organization to advance specific improvement work?
4. **Other researchers and practitioners:** What important issues or problems in the field relate to the work of the NICs?

What is included in the proposal?

A 90-Day Cycle proposal includes six elements (see Appendices for proposal template):

1. **Intent statement:** What is the rationale or business case for this cycle? What is the big picture goal? Why is it important to conduct the cycle?

2. **Aim statement:** What do you want to accomplish through the cycle?

3. **Audience:** Who will use the information

generated through the 90-Day Cycle (product owner)? In cases where you have more than one user, identify them as primary and secondary. With multiple audiences, your deliverable may need to be customized for specific purposes.

4. **Deliverable:** What is the main product that the 90-Day Cycle will generate? Common deliverables include driver diagrams, process maps, and concrete practices, or tools, such as discussion protocols. Whatever the deliverable, the audience should find it immediately useful to them in their

work. The team also submits a final report at the end of the cycle, which summarizes key highlights and learnings from the cycle and describes the deliverable in greater detail.

5. **Team lead and members:** Who is the team lead? Team member(s)? See roles and responsibilities (pp. 21-22).

6. **Key resources and experts:** What organizations, individuals (researchers, practitioners, and those from out-of-field), and/or readings will be key sources of information? Who are potential product testers?

> **TIP**
>
> ### IDENTIFY KEY RESOURCES AND EXPERTS
>
> The approval team and leadership team can be very helpful in identifying key resources or experts and should share their suggestions during this process. Make sure to remind them to do this!

What does the proposal submission and review process look like?

(See p. 20 for process map and pp. 21-22 for roles and responsibilities.)

1. **SIX** weeks before a wave of 90-Day Cycles begins, the project manager contacts leadership team and directors (potential product owners) to solicit nominations for topics.

2. **FIVE** weeks before a wave begins, the approval team decides on a short list of topics to pursue. The project manager notifies product owners about the status of their topic.

3. **FOUR** weeks before a wave begins, product owners whose nominations made the short list write and submit a proposal to the project manager.

4. **THREE** weeks before a wave begins, the approval team shares topic proposals and potential team members with leadership team for feedback.

5. **TWO** weeks before a wave begins, the approval team finalizes topics. The project manager informs product owners of deci-

sions. Product owners and team leads write and submit charter (see below for elements of charter) to the project manager.

6. **ONE** week before a wave begins, the approval team approves charter and team members.

What is a charter?

The charter is a short document (one to three pages) that describes the purpose and rationale of the 90-Day Cycle. A 90-Day Cycle charter includes nine elements (see Appendices for charter template). Many are adapted from the proposal:

1. **Intent statement:** What is the rationale or business case for this cycle? What is the big picture goal?

2. **Aim statement:** What do you want to accomplish through the cycle?

3. **Background:** What is the current state of knowledge on this topic? How will this cycle add to the knowledge base?

4. **Initial identification of relevant literature:** What are some articles and research to read?

5. **Potential experts:** List of potential experts and/or organizations to approach:
   a. Academic experts
   b. Expert practitioners
   c. Out-of-field experts
   d. Product testers: Who will do the testing and/or where will you test?

6. **Key deliverables and intended results:** How will you reach the aim? What will you accomplish during each phase and on what schedule?

7. **Audience or customer for the work:** Whom do you expect to use this content? How will you engage them along the way?

8. **Team:**
   • Product owner
   • Team lead
   • Team member(s)

9. **Open Questions:** Questions for the approval team about any of the above (e.g., issues you are struggling with in determining the intent or aim of the cycle, requests for recommendations on experts to contact, etc.).

The first phase of the 90-Day Cycle is the scan. The goal of the scan is to review current academic and practical knowledge relevant to the problem the cycle is designed to address. By the end of this phase, the 90-Day Cycle team will be able to articulate widely shared conclusions in the field as well as significant open questions and key tensions. The team will choose a specific issue to focus on for the remainder of the cycle and share initial ideas about the product or framework to be tested.

What do you do in the scan phase?

These are the key activities of the scan phase:

1. **Read literature.**
   Scholarly journals and books on the topic of the 90-Day Cycle are the primary sources of literature. Take notes on key points while reading, and share them with 90-Day Cycle teammates during regular meetings to synthesize emerging ideas.

   > **TIP**
   >
   > **WHERE TO BEGIN READING?**
   >
   > A recent literature review can be a great place to begin the scan. The right literature review will summarize some essential understandings in the field and point you to some of the key texts and experts on the topic.

2. **Interview experts from within field.**
   Experts include scholars and practitioners who are knowledgeable about the topic at hand. It is critical that the scan include both researcher and practitioner perspectives. Approach interviews with an open mind. It can be helpful to articulate your ideas ahead of time about what topics will be most useful, but be willing to hear things you were not expecting, and for the conversation to

   > **TIP**
   >
   > **SCHEDULE INTERVIEWS ASAP**
   >
   > The logistics of scheduling can take time, so schedule interviews early. If you start as soon as the 90-Day Cycle is confirmed, you can hit the ground running in the first week.

   go in unanticipated directions. Note any surprises. (A semi-structured interview protocol is often a good bet. It helps guide your subject through important topics while remaining open to new information and directions.)

3. **Interview "out-of-field" experts.**
   Innovation depends on bringing ideas together in new ways. Professionals from outside fields who have grappled with issues related to your cycle can be a great source of inspiration. Find out what these

   > **TIP**
   >
   > **HAVE A "GO TO" EXPERT**
   >
   > If there is an expert who is particularly helpful and interested in the work of a 90-Day Cycle, solicit his or her help at key points over the course of the cycle to test your ideas and emergent understandings.

"out-of-field" experts think about a topic, and how they address the same problem in their field. Listen for what can be adapted to your field, and what lessons can be learned from their experiences.

4. **Record key points from the readings and the interviews.**
   Take notes on readings and interviews and identify key points. Record interviews if possible. As your focus narrows later in the 90-Day Cycle, you may benefit from listening to the interview again with new ears.

5. **Refine charter.**
   The preliminary charter created during the pre-cycle phase is refined and finalized by the approval team within the first seven days of the cycle.

6. **30-day review.**
   Phase 1 ends with the 30-day review, a meeting in which the 90-Day Cycle team receives feedback from the approval team about the progress to date and next steps. (See the roles and responsibilities section for further description of the approval team.) The 90-Day Cycle team will recommend potential focus areas or prototypes for testing to the approval team. Promising 90-Day Cycles will have their focus refined and approved at this meeting. The decision may also be made to abandon a 90-Day Cycle if sufficient progress has not been made or if no potential prototypes surface during the scan phase.

Key points regarding the process of the scan phase:

These are some recommendations for conducting the scan for a 90-Day Cycle.

1. **2-2-1.**
   We recommend the 2-2-1 strategy of scanning. Start by reading two journals/books, then interview two within-field experts, and finally interview one out-of-field expert. Synthesize the knowledge you've gleaned, then go back to the beginning of the 2-2-1 set and start over with new readings and interviews. This structure does not need to be followed strictly, but even loosely following the order ensures a good balance of literature and interviews, and a good balance of within-field and out-of-field perspectives.

2. **Get broad overview first.**
   To the extent possible, start the scan by talking to experts and reading lit-

erature most likely to provide a broad overview on the topic. It can be easier to make sense of specific questions in the field if you start with a broader view.

> ### GRAPHIC ORGANIZERS FOR SYNTHESIS
>
> Use a graphic organizer as a tool to synthesize learning from interviews and readings. Driver diagrams, process maps, concept maps, and other tools for organizing ideas or processes are useful for making sense of the scan, and can help to productively structure team meeting conversations.

3. **Meet regularly with the 90-Day Cycle team.**

   The cycle team should meet at least once a week to check in on progress, share and synthesize learning, solidify understandings, and determine next steps.

4. **Snowball sampling.**

   At the end of every interview, ask the subject for recommendations of key texts or other experts to consult. When reading literature, take note of any references (texts or authors) that seem particularly pertinent to the topic. Use these as next steps for interviewing and reading.

90-DAY CYCLE PHASE 2: FOCUS

In the second phase of the 90-Day Cycle, the team narrows its attention to a single focus area for the remainder of the cycle. While the scan phase produces an overview of the topic at hand, during the focus phase the 90-Day Cycle team decides which aspect of this larger topic to drill into, and from what angle the investigation should be approached—all in consideration of the anticipated product. By the end of this phase, the team will have designed and tested a prototype (framework, process, etc.) through rapid, small-scale testing.

What do you do in the focus phase?

These are the key activities of the focus phase.

1. **Refine the focus.**
   The 30-day review at the end of Phase 1 is an opportunity for the approval team to provide guidance about the cycle's focus. Based on this conversation, the 90-Day Cycle team identifies a focus from the larger scan. This focus, which can be a smaller piece of the broader field or a particular angle or perspective on the field, can drive the development of the innovation and the final product of the 90-Day Cycle.

2. **Deepen the scan.**
   Most 90-Day Cycle teams will continue to scan the field during Phase 2, in order to deepen their knowledge on the focus area of the cycle. Interviews and literature searches will hew more closely to the focus area during this phase. Scanning activities will begin to wind down.

3. **Design the product.**
   The 90-Day Cycle team will design a first draft of the innovation (i.e., the framework, process, tool, or instrument) to test on a small scale.

4. **Conduct initial testing and refinement of the innovation.**
   Once the first draft of an innovation is created, rapid testing is needed to inform improvement of the initial prototype. Testing can occur in a variety of ways, and which type of test to employ depends on the nature of the innovation.

TIP

MULTIPLE, RAPID, SMALL TESTS

Each test that occurs during a 90-Day Cycle should be conducted rapidly and at a small-scale—one practitioner undertaking one new action, for example. Leverage existing relationships for quick results. Who is available to test something right away? Build each test out of the previous one. What did your team learn from testing that can be incorporated into your innovation right away? Take the newly improved innovation and test again.

There are two main types of testing:

a. **Testing in theory.** "Test" a framework or a product by asking a number of experts to review it. What is missing and needs to be added? What is extraneous? What should be changed within the innovation you have designed? In the case of a framework, does the conceptual mapping resonate with the expert? Are the categories and the relationships among them "right?" This type of testing is analytic in nature.

b. **Testing in practice.** Test a product (a tool, a measurement instrument, etc.) by asking practitioners to try it in the field. Testing in practice is a form of empirical testing. Use Plan-Do-Study-Act (PDSA) cycles to test the innovation (see Appendices for description of PDSA cycles). How does this innovation function in practice? Did it unfold in the expected way? What was unexpected or surprising? What modifications need to be made given the outcome of the test? Every test must include time explicitly set aside to synthesize learning from the results.

5. **60-day review.**
The focus phase ends with a 60-day review, in which the 90-Day Cycle team receives further feedback from the approval team about progress to date and next steps. The 90-Day Cycle team will share their innovation in its draft form at this meeting, and secure input on next steps for the development of the innovation. In rare cases, a team may decide to abandon a 90-Day Cycle. By the end of this meeting, the 90-Day Cycle team will have a clear idea of what will be produced by day 90. (See p. 13 for a tip about "SBAR," a communication technique that may be used in the 30- or 60-day reviews.)

> **EXAMPLE**
>
> **TESTING IN PRACTICE**
>
> For a 90-Day Cycle on giving feedback to new teachers, a Carnegie team tested protocols to be used by both the feedback provider and receiver during the feedback conversation. They first tested the protocol with staff at the Foundation, then with principals and teachers.

90-DAY CYCLE PHASE 3: SUMMARIZE

In the third phase of the 90-Day Cycle, the team refines its innovation and summarizes its work. Rapid, small-scale tests continue into this phase to address narrower and more clearly defined questions. By the end of Phase 3, the team will submit a 90-Day Cycle report, including a full account of the innovation the cycle has produced, to the product owner.

What do you do in the summarize phase?

These are the key activities of the summarize phase.

1. **Continue to test.**
   Most 90-Day Cycle teams will continue to test their innovation into Phase 3 with rapid, small tests. With the learning gleaned from each test, the innovation is refined.

2. **Write the 90-Day Cycle report.**
   The 90-Day Cycle report captures and summarizes the learning from the cycle. It also describes the product to the owner and others who will use it, along with advice on its use (see Appendices for report example and template). The report may take various forms, but generally includes sections on:

   a. **Intent:** What is the cycle about and why was it initiated?

   b. **Background:** In what context is the issue being addressed?

   c. **Description of work:** What were the methods used during the project? What, or who, were the sources of information?

   d. **Results:** What came out of this 90-Day Cycle? This section is the "meat" of the report, and includes a presentation and description of the innovation itself.

   e. **Conclusions and recommendations:** What should be done with the deliverables from this 90-Day Cycle? What advice does the team have regarding its use, further development, etc.?

3. **90-day review.**
   A few days after the 90-Day Cycle report is submitted, the 90-Day Cycle team meets with the approval team to review the findings of the cycle. This is an opportunity for the approval team to provide feedback and to have a preliminary discussion about how to use the findings from the report.

Key points regarding the process of the summarize phase:

1. **Share the writing task.**
   Distribute the work of writing the report among your team members. Some sections may particularly lend themselves to different individuals on the team. If various members write the report, read through the final draft to make sure it flows well,

> **TIP**
>
> **WRITING TIME**
>
> It's hard to find the time to write! Block off writing time on your calendar so you have the protected time and space necessary to execute this important task.

that tone and voice are consistent, and that there are no redundancies. Even if one person does all of the writing, the entire team should weigh in on the contents of the report by collectively developing an outline and reviewing various drafts.

2. **Plan for the stages of writing.**
Make sure you leave enough time for each stage of writing, including planning the report before you begin, writing the report, and revising and editing of multiple drafts. Planning the report, whether by creating a formal outline or simply talking through the contents of the various sections, is a good way to get the entire team involved in the writing process. Think about submitting a "good enough" draft on the last day of the cycle. There will be time afterward to refine it for various audiences, as necessary.

What happens after the cycle is completed?

1. **Do final revisions.**

    Given the tight timeframe for writing the report, the team has an additional two weeks to complete final revisions. Upon receiving the report on day 90, the approval team has five days to read and provide feedback on the initial draft. When the team finishes its revisions, the final report is given to the product owner.

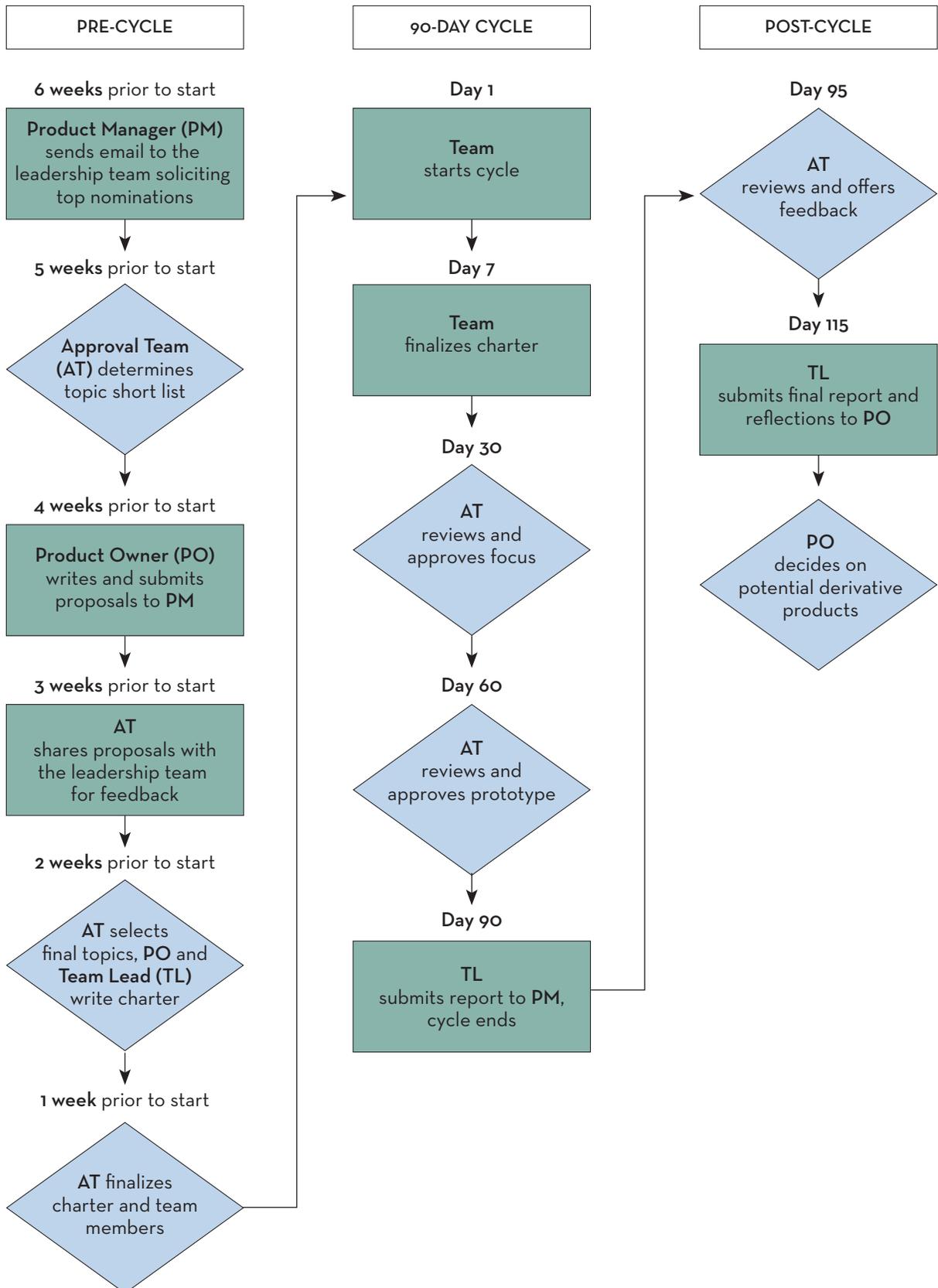2. **Product owner decides how to use the findings from the cycle.**

    Findings from the 90-Day Cycle can be used in a variety of ways:
    *   Launch a new line of work in the NICs,
    *   Be incorporated into the current work of a NIC,
    *   Serve as the basis for a white paper, policy brief, or blog posting.

The product owner determines the extent of the 90-Day Cycle team's involvement in the above activities.

90-DAY CYCLE PROCESS MAP

| PRE-CYCLE | 90-DAY CYCLE | POST-CYCLE |

PRE-CYCLE

6 weeks prior to start

Product Manager (PM) sends email to the leadership team soliciting top nominations

5 weeks prior to start

Approval Team (AT) determines topic short list

4 weeks prior to start

Product Owner (PO) writes and submits proposals to **PM**

3 weeks prior to start

AT shares proposals with the leadership team for feedback

2 weeks prior to start

AT selects final topics, **PO** and **Team Lead (TL)** write charter

1 week prior to start

AT finalizes charter and team members

90-DAY CYCLE

Day 1

Team starts cycle

Day 7

Team finalizes charter

Day 30

AT reviews and approves focus

Day 60

AT reviews and approves prototype

Day 90

TL submits report to **PM**, cycle ends

POST-CYCLE

Day 95

AT reviews and offers feedback

Day 115

TL submits final report and reflections to **PO**

PO decides on potential derivative products

90-DAY CYCLE ROLES AND RESPONSIBILITIES

	RESPONSIBILITIES	SKILLS	TIME
Team lead*	• Organizes and oversees team work plan • Writes 90-Day Cycle (90DC) charter • Owns authorship of final report, deliverable • Communicates with product owner about charter, cycle progress • Shares team member responsibilities	• Has strong understanding of 90DC process and Model for Improvement • Must have some (not necessarily expert) knowledge of subject matter • Must have served as team member on 90DC	30% of time
Team member*	• Assists with interviews (identifying contacts, scheduling interviews, conducting interviews, etc.) • Assists with literature reviews (e.g., finding articles, summarizing key information, etc.) • Contributes to creation and development of final report, deliverable	• Has basic understanding of 90DC process and Model for Improvement • Has strong research and writing skills	25% of time
Expert	• Provides content knowledge on topic • Recommends resources (names of other experts or key literature) • Potential tester	• Has either research or practical expertise on topic	1-3 hours for cycle
Testers	• Tests prototypes (e.g., process map, product, tool/instrument, practice, etc.)	• Has basic understanding of purpose and function of prototype	5 hours for cycle

*Team lead training

To become a team lead, one must successfully complete the following training path:

• Serve as team member on a 90DC.

• Serve as team lead apprentice with team lead veteran on two 90DCs. For the first 90DC, the veteran drives work and coaches apprentice. For the second 90DC, the apprentice drives work and is supported by veterans.

**Team member training

• Read 90DC Handbook

• Participate in 90DC and/or improvement training

	RESPONSIBILITIES	TIME
Product owner	• Determines need for 90DC • Writes preliminary 90DC proposal (includes aim, target audience, deliverable, team members, and potential expert contacts) • Selects team members in consultation with the leadership team and staff • Provides guidance, feedback to team lead as needed	7-10 hours for cycle
Approval team	<u>Members</u> • Product owner • Leadership team member who oversees 90-Day Cycles • Additional leadership team members (as appropriate) • All team members provide feedback and final approval on charter, focus, prototype, and final report	20 hours for cycle
Project manager	• Calendars 90DC activities (e.g., cycle start date, check-in meetings, etc.) • Coordinates weekly team meetings • Makes sure teams are meeting specified milestones • Conducts process review, including collection of process measures • Oversees knowledge management of 90DC	15 hours for cycle

PROPOSAL TEMPLATE

[Title]
Proposal: 90-Day Cycle
[Document Date]
Wave XX, [Dates]

I. Intent statement:

What is the rationale or business case for this cycle? What is the big picture goal?

II. Aim statement:

What do you want to accomplish through the cycle?

III. Audience:

Who is the anticipated user of the information generated through the 90-Day Cycle? In cases where you have more than one user, identify them as primary and secondary. Your deliverable may need to be modified if you have multiple audiences.

IV. Deliverable:

What is the main product that the 90-Day Cycle seeks to generate? Common deliverables include driver diagrams, process maps, or tools. Whatever the deliverable, the audience should be able to make use of it quickly. The team also submits a final report at the end of the cycle, which summarizes key highlights and learnings from the cycle and describes the deliverable in greater detail.

V. Team lead and support members:

Who are the team lead and team member(s)?

VI. Key resources and experts:

What organizations, individuals, and/or readings do you see as being key sources of information? Who are potential testers?

CHARTER TEMPLATE

I. Intent statement:
What is the rationale or business case for this cycle? What is the big picture goal?

II. Aim statement:
What do you want to accomplish through the cycle?

III. Background:
What is the current state of knowledge on this topic? How will this cycle add to this knowledge base?

IV. Initial literature search:
What are some articles and research to read?

V: Potential experts:
List of potential experts and/or organizations to approach, including:
* Academic experts
* Expert practitioners
* Product testers: Who will do the testing and/or where will you test?

VI. Key deliverables and intended results:
How will you reach the aim?

PHASE	DETAILS	DATES & REVIEW
Scan		
Focus		
Summarize (deliverable)		

VII. Audience or customer for the work:
Who do you expect to USE this content? How will you engage them along the way?

VIII. Team:
* Product owner
* Team lead
* Team member(s)

IX. Open questions:
Questions you may have for the approval team about any of the above (recommendations for experts and testers, issues about the aim, etc.).

FINAL REPORT TEMPLATE

[TITLE]
90-Day Cycle Summary Report
[Date]

Executive Summary:

I. Research and development team:
- Team member names

II. Intent & aim:
- You can use intent and aim from charter. If either changed during the course of the cycle, revise accordingly.

III. Background:
- Detail context and topic being addressed.
- Clearly state why this topic is important.
- Clearly articulate performance gaps this cycle addresses, if appropriate.

IV. Description of work to date:
- Description of methodology
- Update on deliverables from charter

V. Results of the 90-Day Cycle:
- Include what has been learned
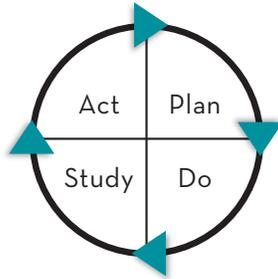
VII. Conclusions and recommendations:
- Answer the question: "What are we going to do with the product?"

VI. Open questions:
- Questions still lingering at the completion of the cycle

VIII: Appendices:

PLAN-DO-STUDY-ACT TEMPLATE

MODEL FOR IMPROVEMENT
Objective for this PDSA Cycle:

DATE:

Is this cycle used to develop, test, or implement a change?

AIM OF CYCLE:

PLAN:

What questions do you want to answer?	What are your predictions?
1.	1.

Plan to answer questions:
Who:
What:
When:

Plan for collection of data:

DO: *Carry out the change or test; collect data and begin analysis.*

STUDY: *Compare the data to your predictions.*

ACT: *What do we want to do next? Plan for the next cycle.*

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