

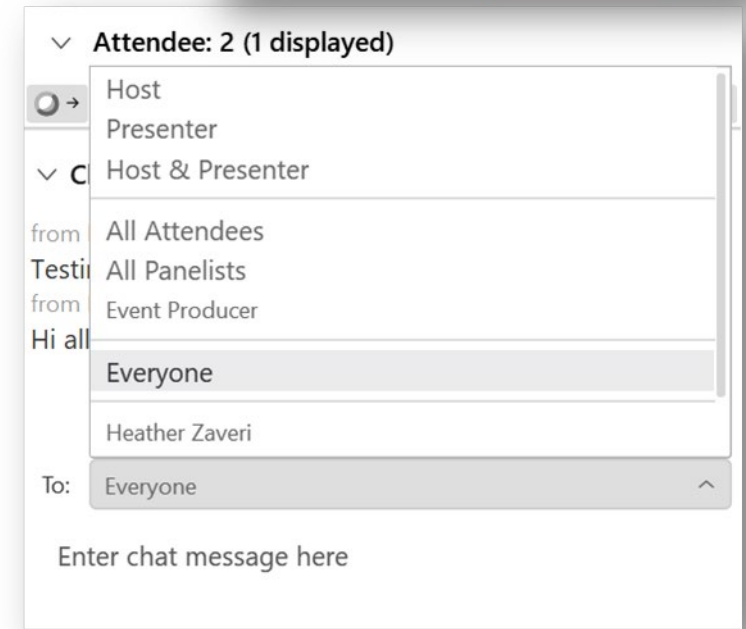
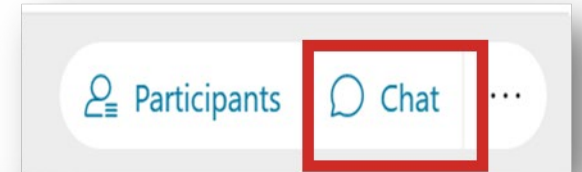
# HMRF grantee office hours: Continuous quality improvement

July 27, 2021, 2:00 – 3:00 ET



# How you can participate

- / **Select Everyone in the chat to ask questions or share experiences**
- / **Respond to polls about specific CQI topics**
- / **REMINDER: Never text or email client personally identifiable information (PII), including during office hours or when contacting the TA teams**



# Today's focus

- / Identifying areas of improvement**
- / Transforming areas of improvement into SMART goals**
- / Measuring progress toward your SMART goals**

# Identifying areas of improvement

# Get specific about the challenge

**Table D1. Your program's issue(s), SMART goal(s), and data source(s)**

**For the area of improvement your team selected above, please describe the issue you are trying to solve, a related SMART goal, and possible data sources you could use.**

What is the specific problem or issue you are trying to solve?

What is the SMART goal that would show an improvement on this issue?

What data source could you use to measure progress towards that goal?

# What problem are you addressing?

- / Learn more about your challenge – use nFORM data and supplemental data sources (e.g. client feedback) to inform your understanding**
- / Get specific about your problem**
  - What is the extent of the problem?
  - Who is experiencing the problem?
  - When and/or where does the problem present itself?

# Example: Create a problem statement

- / **Initial statement: Our programmatic challenge is low program completion**
- / **What is the problem?**
  - **Only 55%** of clients who enroll in our program complete our primary workshop. We have the most trouble retaining employed clients; only 42% of employed clients complete. We deliver the program during weekday evening session series and during weekend sessions; the problem is most apparent in weekday groups.

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# What are some of your early challenges?

Please go to [www.menti.com](http://www.menti.com)  
Enter the code: **2433 4241**



# Transforming areas of improvement into SMART goals

# When and how do we create SMART goals?

For the area of improvement your team selected above, please describe the issue you are trying to solve, a related SMART goal, and possible data sources you could use.	
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What data source could you use to measure progress towards that goal?	

# SMART goals to support CQI

## / What are they?

- Answer the question: what are we trying to accomplish?
- Specify how much (extent of problem) and for whom (who is experiencing)
- Also need to be clear on by when (when do you expect to see progress)?

## / What makes a goal SMART?

- Specific
- Measurable
- Achievable
- Relevant
- Time-bound

# How do SMART goals support CQI?

- / Provide a gauge to track progress over time**
- / Are explicit about what the CQI team needs to accomplish**
- / Keep the team focused on what matters**
- / Inspire action toward improvement**

## Specific

- / **Answers the question: For whom? And where/when is it happening?**
  - / *OK:* We will improve retention
  - / *Better:* We will increase retention in our weekday workshops among employed clients.
- / **Getting specific will help your team consider: Do you need to set a goal for the whole program, or should you focus on a subgroup?**

# Measurable

**/ Answers the question: By how much?**

*/ OK: We will increase retention among employed clients.*

*/ Better: We aim to increase the retention rate among employed clients from 42% to 60%.*

**/ Measures for SMART goals should allow you to track progress over time, so need to be quantifiable and objective**



## Attainable

- / Answers the questions: Is the goal realistic? Does your program have the ability to influence it?**
  - / Probably not: Only 42% of employed clients completed the workshop. We would like 100% of employed clients to complete.*
- / Talk with staff about what feels attainable to ensure you're setting a goal that is motivating but grounded in reality**

# Relevant

## / **Answers the question: Is the goal meaningful?**

/ *OK*: We will improve overall satisfaction by 10%.

/ *Better*: We will increase the retention rate among employed participants by 10%.

## / **Ensure the goal is tied to the result you are aiming for and not the work your team is doing to improve**

- *Not*: We will increase the number of reminders we send to clients.

## Time-bound

### / **Answers the question: by when?**

/ OK: We aim to increase the retention rate among employed clients from 42% to 60%.

/ Better: We aim to increase the retention rate among employed clients from 42% to 60% by the end of Q2.

### / **The time frame should be reasonable; at the start of an improvement effort, consider setting a shorter-term goal for quicker feedback**

## Our final SMART goal

/ **SMART goal: We will increase retention in our weekday workshops among employed clients (SPECIFIC) from 42% to 60% by the end of Q2.**

## Our final SMART goal

/ **SMART goal: We will increase retention in our weekday workshops among employed clients from 42% to 60% (MEASURABLE) by the end of Q2.**

## Our final SMART goal

**/ SMART goal: We will increase retention in our weekday workshops among employed clients from 42% to 60% by the end of Q2.**



**Achievable**



**Relevant**

## Our final SMART goal

/ **SMART goal: We will increase retention in our weekday workshops among employed clients from 42% to 60% by the end of Q2 (TIME-BOUND).**

# Troubleshooting SMART goal development

## / I'm not sure how to make my goal specific.

- Try going back to your data to understand your challenge more thoroughly (nFORM and other sources).

## / I don't have data to track my goal!

- SMART goal measures need to be quantifiable. If you don't have a pre-existing, quantifiable metric for your challenge, you may need to collect more information.

## / I want a goal that shoots for the stars and inspires!

- SMART goals should inspire action toward something *achievable* or they may have the opposite effect of discouraging the team.



# Share with us

**/ What SMART goals have you developed? Or share a general goal that you want to make SMART!**



# Measuring progress toward your SMART goal

# Specify your data source

**For the area of improvement your team selected above, please describe the issue you are trying to solve, a related SMART goal, and possible data sources you could use.**

What is the specific problem or issue you are trying to solve?

Only 55% of clients who enroll in our program complete our primary workshop. We have the most trouble retaining employed clients; only 42% of employed clients complete. We deliver the program during weekday evening session series and during weekend sessions; the problem is most apparent in weekday groups.

What is the SMART goal that would show an improvement on this issue?

We will increase retention in our weekday workshops among employed clients from 42% to 60% by the end of Q2.

What data source could you use to measure progress towards that goal?

# What data will you use to measure?

## / **Is data currently available to track your SMART goal?**

/ Is your team already tracking it? For example, HMRF performance measures.

## / **Does the data help your team track progress over time?**

- How often do you collect and review it?

## / **Do you need to collect new data?**

/ What do you need to collect? What tools will you use to collect it?

# Data for SMART goals

## / **Client and program data from nFORM, such as**

- Enrollment
- Applicant characteristics
- Individual services (service contacts, referrals, and incentives)
- Workshop participation
- Entrance and exit survey outcomes

# EXAMPLE: Tracking engagement

/ **Scenario: The CQI team flags engagement in virtual sessions as a challenge**

/ **Data challenge:**

/ No existing data in nFORM or other sources to directly measure engagement in virtual sessions

/ **Solution:**

- Identify a measure that is quantifiable, objective, and feasible to track over time

# Which source is the best metric?

**/ Suggestion 1: We will conduct interviews with facilitators at key points in time to gauge their perception of client engagement over time.**

- **Is it feasible?**
- **Is it a good fit?**

# Which source is the best metric?

/ **Suggestion 1: We will conduct interviews with facilitators at key points in time to gauge their perception of client engagement over time.**

- **Is it feasible?** No, conducting interviews with all facilitators at regular intervals to be able to assess progress over time would be a major data collection undertaking.
- **Is it a good fit?** Likely not. Many interviews are open-ended and not quantifiable, and this metric does not fully capture client perspectives.



# Which source is the best metric?

**/ Suggestion 2: We will use post-session polls to track clients' self-reported engagement in each session**

- **Is it feasible?**
- **Is it a good fit?**

# Which source is the best metric?

## / **Suggestion 2: We will use post-session polls to track clients' self-reported engagement in each session**

- **Is it feasible?** Yes, polls are quick to administer at regular intervals
- **Is it a good fit?** Not the best fit for this SMART goal. Polls or short surveys are an excellent tool to collect feedback as part of a road test; however, in this situation clients may not want to report their true thoughts to the facilitator about how engaging a session was or may be influenced by how they feel on a given day.

# Which source is the best metric?

- / **Suggestion 3: We will track whether clients actively participate during classes to represent engagement.**
  - **Is it feasible?**
  - **Is it a good fit?**

# Which source is the best metric?

## / **Suggestion 3: We will track whether clients actively participate during classes to represent engagement.**

- **Is it feasible?** Yes, while it's additional data collection for facilitators, the program could ask them to use an existing fidelity log or client roster to note which clients participated in each session.
- **Is it a good fit?** Yes, the number of clients participating in each session is quantifiable and objective (though still imperfect!). You can also observe facilitators during workshop sessions to gather qualitative information about the practices they are using to engage clients.

# Completed plan for understanding progress

**For the area of improvement your team selected above, please describe the issue you are trying to solve, a related SMART goal, and possible data sources you could use.**

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What is the SMART goal that would show an improvement on this issue?	We will increase retention in our weekday workshops among employed clients from 42% to 60% by the end of Q2.
What data source could you use to measure progress towards that goal?	We will track whether clients actively participate during classes to represent engagement.



# Open Q&A

# Additional questions?

## / For more resources:

- HMRF Grant Resources (<https://hmrfggrantresources.info/continuous-quality-improvement>) contains tip sheets and informational resources related to CQI

/ Next office hours on August 24, 2021, from 2-3pm ET

/ Submit questions to [hmrfcqi@mathematica-mpr.com](mailto:hmrfcqi@mathematica-mpr.com)