

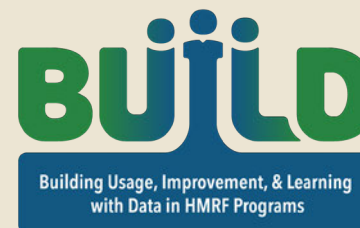
Maintaining focus on your priority challenge

Continuous quality improvement (CQI) office hours

October 25, 2022 | 2:00 – 3:00pm ET



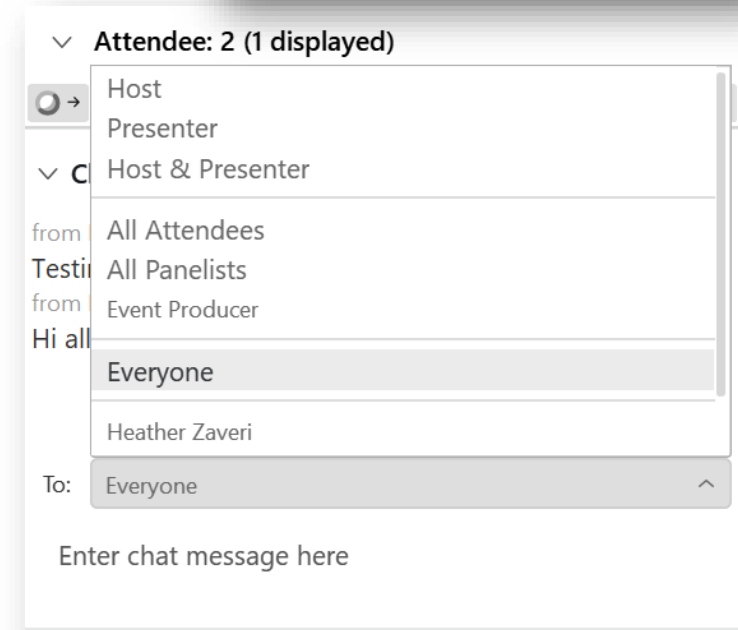
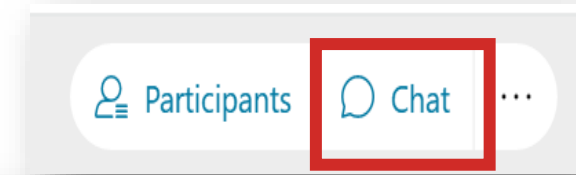
OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families





How you can participate

- / Use the chat to ask questions
- / Ask questions or share verbally using the hand raise feature
- / **REMINDER: Never text or email client personally identifiable information (PII), including during office hours or when contacting the TA teams**





Today's agenda

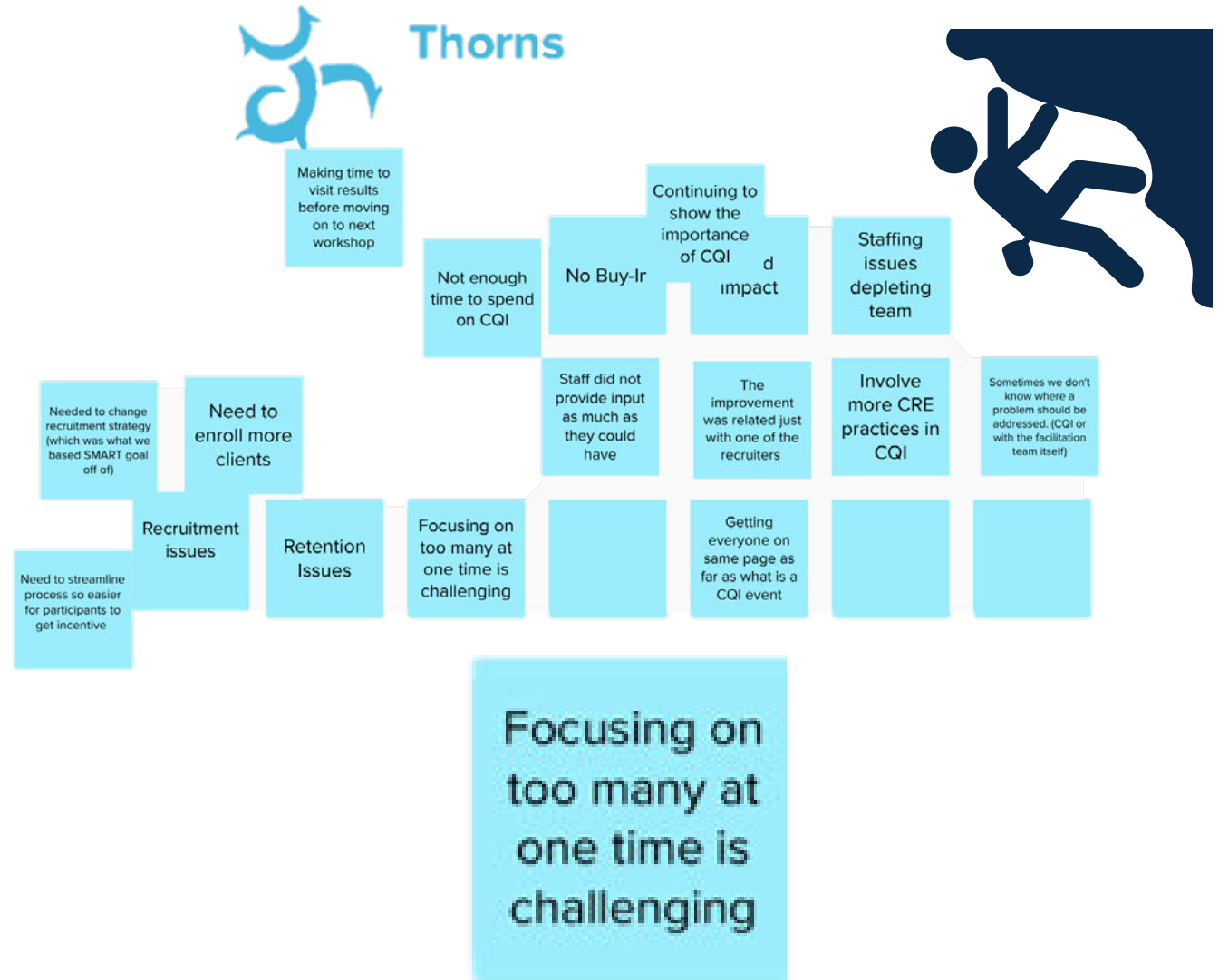
- / **Maintaining focus throughout a CQI cycle**
- / **4DX (Four Disciplines of Execution) as a framework for maintaining focus on CQI**



Grant Year 3: Focusing on challenges

A common challenge:

/ Maintaining your CQI team's focus on one challenge at a time





A disciplined focus on one challenge





Why focus on one challenge?

/ Why is it important to focus on one challenge at a time?

- To be able to determine what works and what doesn't
- To see a challenge through (don't abandon one effort when something else comes up)
- To prevent overtaxing the CQI team and/or staff responsible for implementing strategies
- Opportunity to rally staff around a common goal





High-level challenge area versus your specific problem

/ CQI efforts should be organized around a high-level challenge area

/ Specific CQI cycles will target specific problems, or root causes, to make progress on the challenge

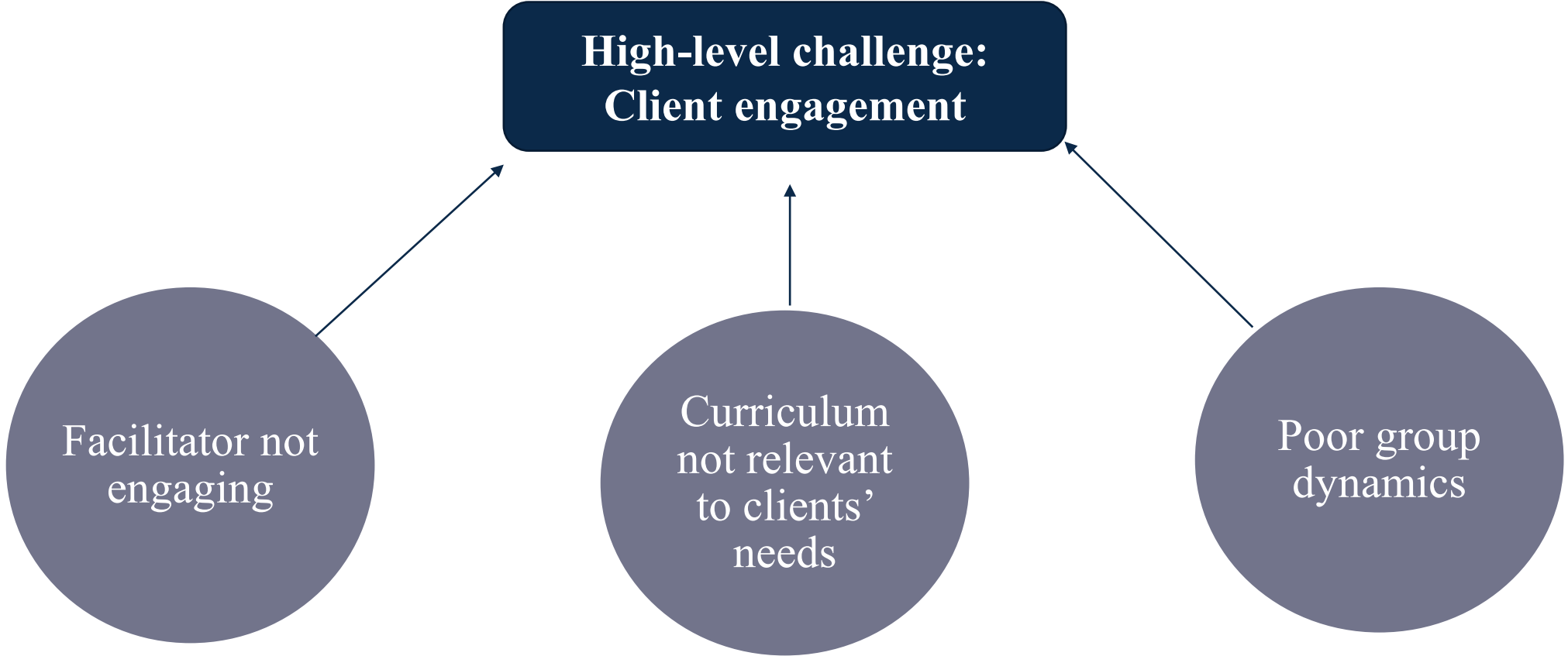
a. Please select one area of improvement for your program:

- Enrollment
- Client completion of services
- Quality of services
- Data collection
- Other _____

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



High-level challenge area versus your specific problem





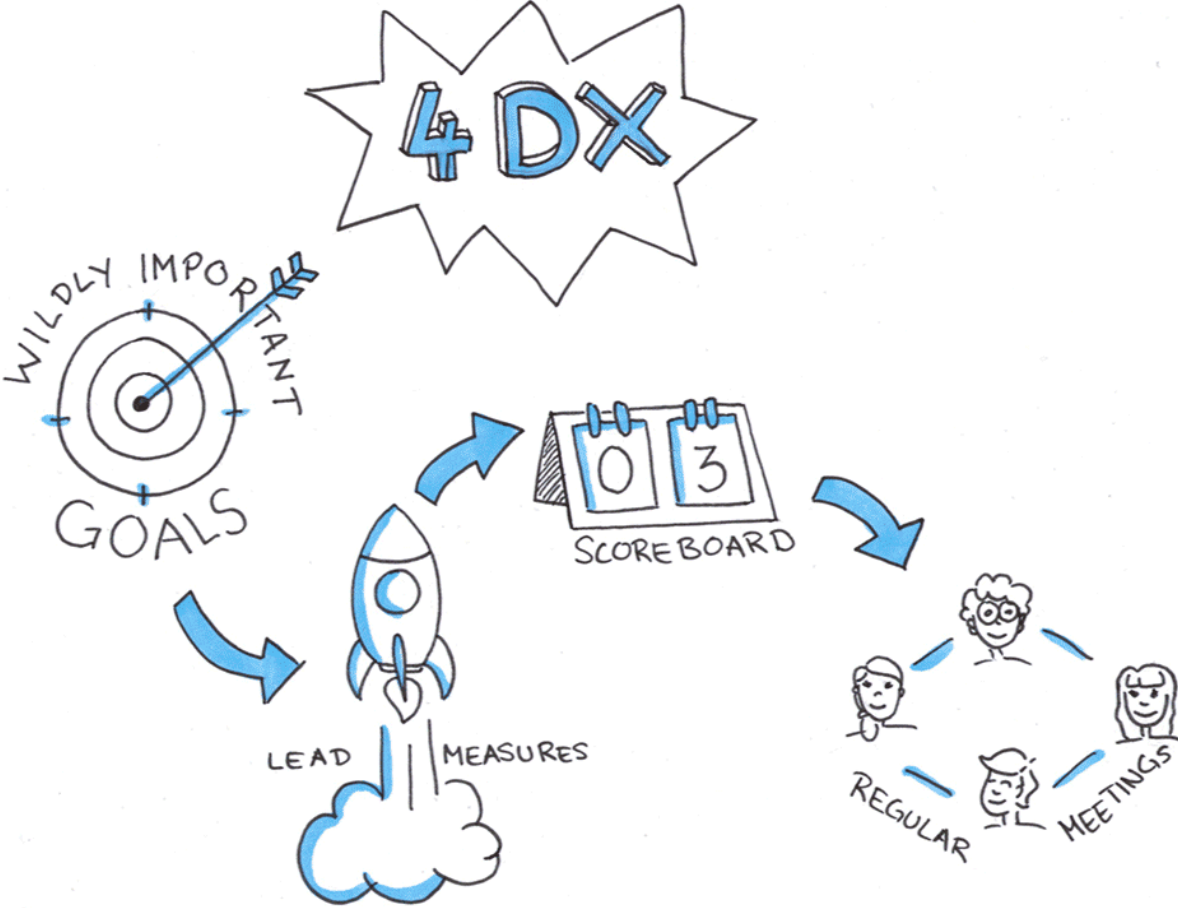
4DX: A framework for maintaining focus on CQI





What is 4DX?

- / “A simple, repeatable formula for executing your most important priorities”
- / A framework that ties together several familiar CQI concepts





The four components of 4DX

1

Focus on the Wildly Important Goal (WIG)

2

Act on the lead measures

3

Keep a compelling dashboard

4

Create a cadence of accountability



Focus on the WIG

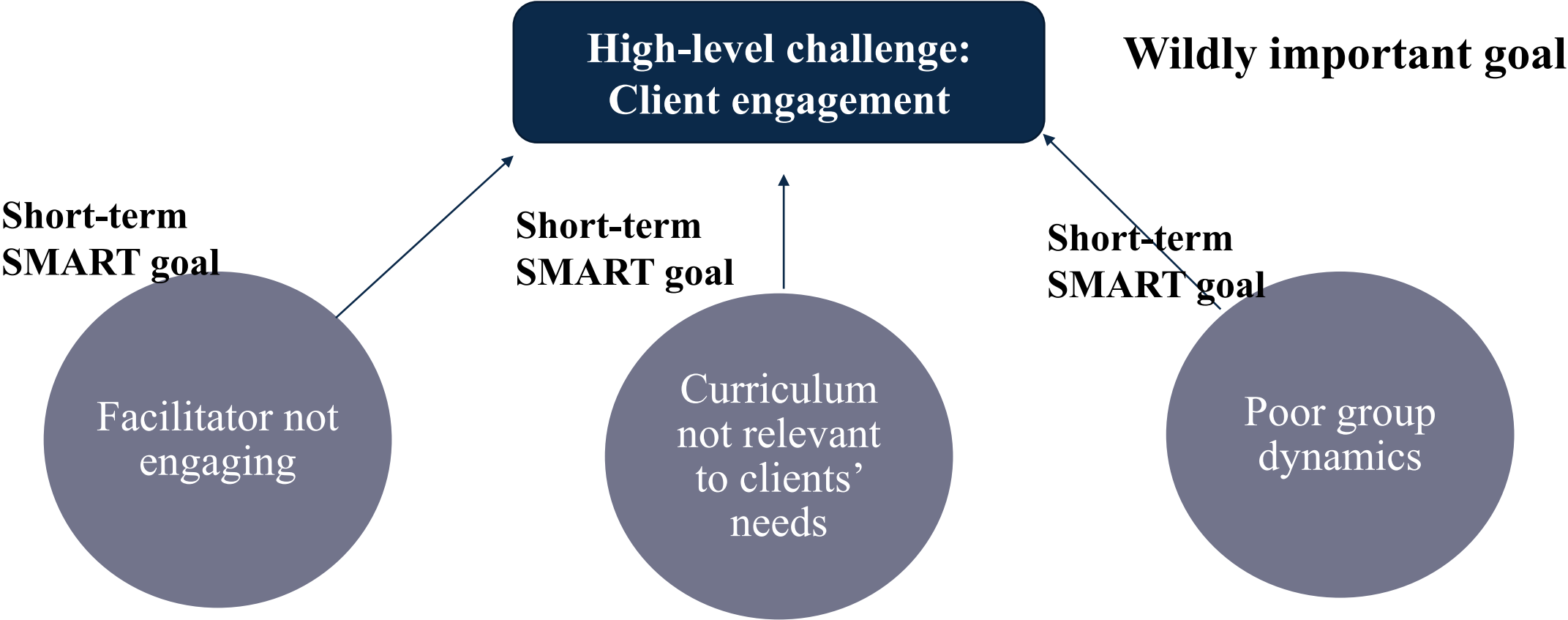
What is a wildly important goal?

- / **A WIG is the most important thing we are trying to accomplish through CQI**
- / **It is motivating to our team**
 - Realistic to achieve **and** significant enough to generate enthusiasm
 - Known by staff across our program
- / **It is our primary SMART goal for CQI**
 - Specifies the extent of improvement we hope to see and by when
 - Example: At 8 months into the year, we are at 50 percent of our annual enrollment target. By the end of the year, we will meet our annual target.





High-level challenge area versus your specific problem





Focus on the WIG

What is a wildly important goal?

- / **A WIG is the most important thing we are trying to accomplish through CQI**
- / **It is motivating to our team**
 - Realistic to achieve **and** significant enough to generate enthusiasm
 - Known by staff across our program
- / **It is our primary SMART goal for CQI**
 - Specifies the extent of improvement we hope to see and by when
 - Example: At 8 months into the year, we are at 50 percent of our annual enrollment target. By the end of the year, we will meet our annual target.





Get everyone involved in your WIG

/ **WIG:**

- Currently, only 30% of youth we serve participate in case management. Our goal is to increase that percentage to 75% by the end of the grant year.

/ **Everyone has a role in progressing toward the WIG:**

- **Data manager:** Identify measures to track progress toward the goal and monitor implementation and outcomes
- **Case managers:** Conduct timely outreach to newly referred clients
- **Facilitators:** Actively promote case management option upon hearing about client needs during workshops
- **Leadership/supervisors:** Check in with staff to identify challenges and troubleshoot



WIG for Montefiore's SHR: Collaboration

/ **What problems do we need to solve?**

- Where is there room for improvement? What do we all agree on?

/ **Area of Agreement: Virtual Dis-Engagement**

/ **What are the causes of the problem of disengagement during workshops?**

- Participant expectations, participant/staff technology challenges, curriculum format not Zoom/virtual-friendly

/ **All team members contribute solutions to address these causes to address ONE WILDLY IMPORTANT GOAL: Increased Virtual Engagement**

- Participant HUB (data team)
- Zoom training (workshop facilitators)
- Curriculum overhaul (workshop facilitators)
- Technology guidance for participants (program assistants)
- Welcome Kit with virtual workshop expectations for participants (recruiters and intake specialists)





Share with us

- / What is the WIG for your team?**
- / To what extent is your whole team contributing to the WIG?**





Act on lead measures

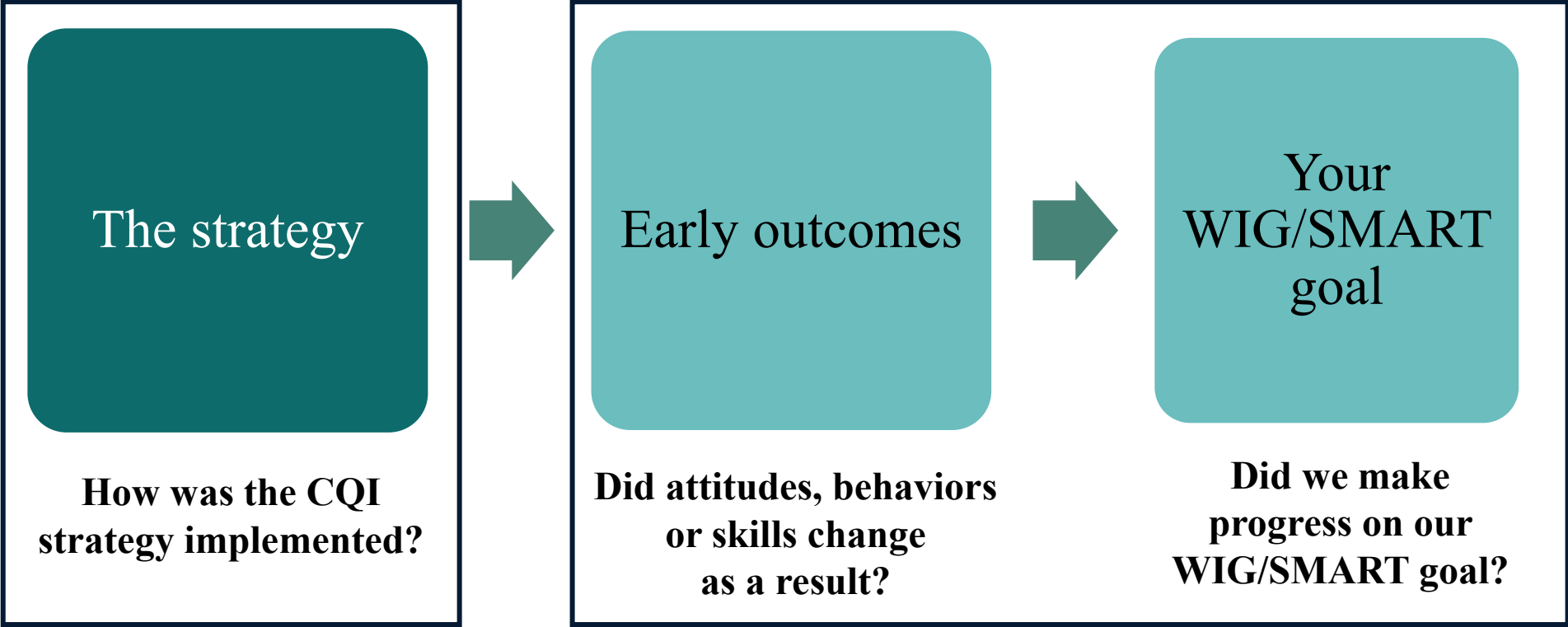
What are lag and lead measures?

- / **A lag measure is the specific change you want to see. It is the quantified, time bound measure of your WIG.**
 - In your CQI template, your WIG is your SMART goal
 - Once your lag measure is set, define your lead measures. Determine the path to achieving your WIG and how to track progress along that path.
- / **A lead measure determines if you are on track with the strategy you designed to reach your WIG. Lead measures predict lag measures.**
 - Lead measures tend to be outputs (e.g., number of outreach attempts; number of successful contacts)
 - Useful for troubleshooting implementation issues as you go
 - Provide more information to make a final decision about the strategy





How lead and lag measures align with your CQI strategy rationale

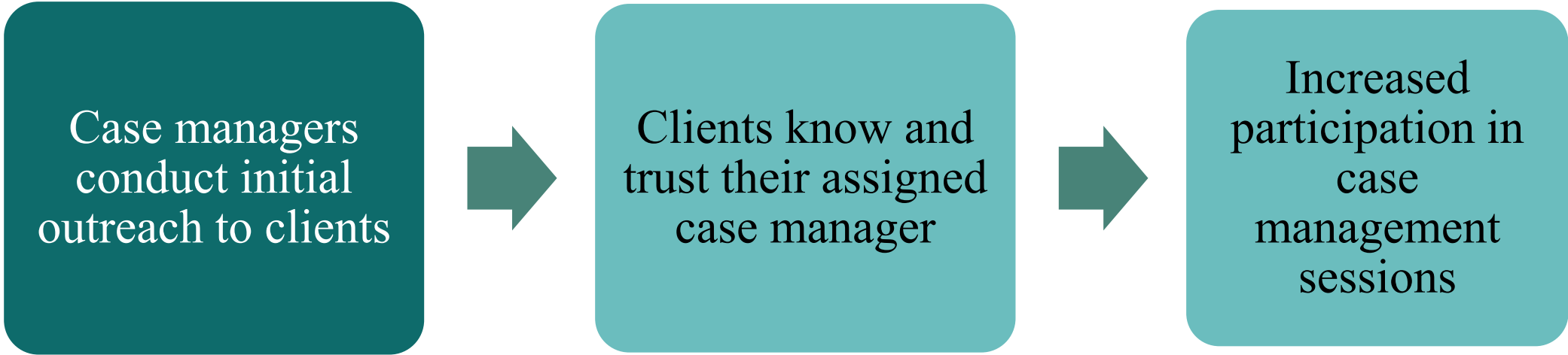


Lead measures

Lag measures



Examples of lead and lag measures



What did we do?

Lead measures:

- % of clients receiving an outreach call one week prior to the class
- % of successful calls

Does it seem promising?

Short-term lag measures:

- Positive response on client intake exit ticket: “I know my case manager.” “My case manager is friendly.”

Are we making progress on our WIG/SMART goal?

Long-term lag measure:

- Rate of participation in case management



Share with us

/ What lead measures do you use, or can you use, to understand whether staff are on track with efforts to influence the WIG?





Keep a compelling dashboard

The value of a dashboard

- / **Keeps the focus on your goal by displaying the most important measures**
- / **Makes data accessible, which helps make it more actionable**
- / **Tip: To ensure dashboards are accessible and informative, collaborate on dashboard design**





Keep a compelling dashboard

What makes a dashboard compelling?

- ✓ **It's for the whole team, not just leaders**
- ✓ **It's actionable—readers should be able to use the dashboard to inform next steps**
- ✓ **It's visually appealing, simple, and accessible**
- ✓ **It's informative, but not cluttered. Readers should be able to determine within 5 seconds whether the effort is on track**
- ✓ **It's updated regularly (e.g., weekly)**



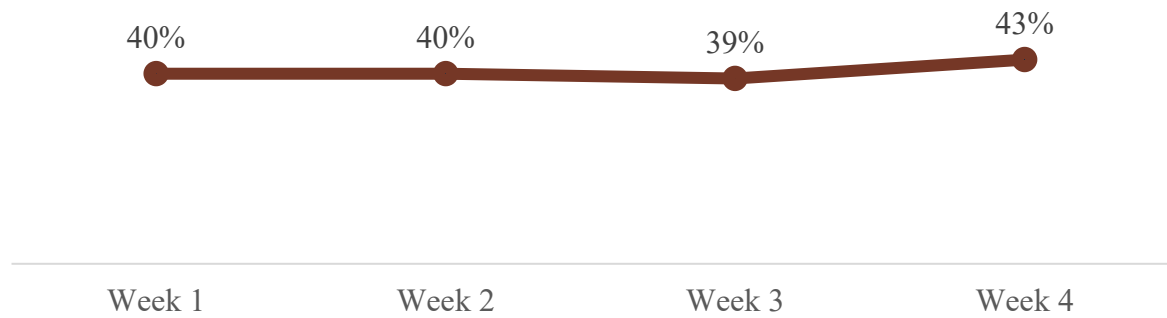


Case manager strategy

Strategy: Have case managers conduct initial outreach to clients to form a relationship early

Goal: Increase the percentage of clients participating in case management from 40% to 65% by December 30

% of clients participating in case management

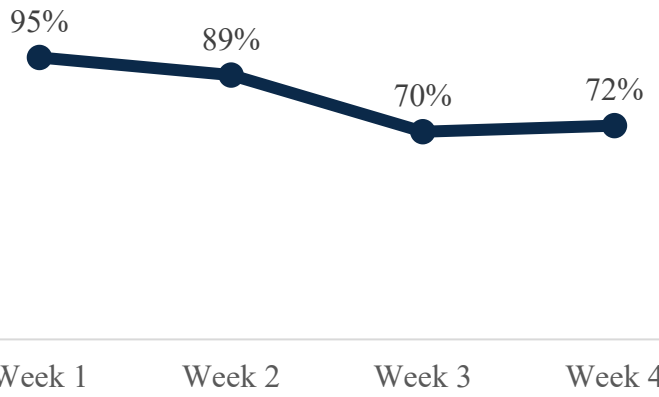


How could we make this dashboard more **actionable**? Readers should be able to use the dashboard to determine action steps.



Case manager strategy

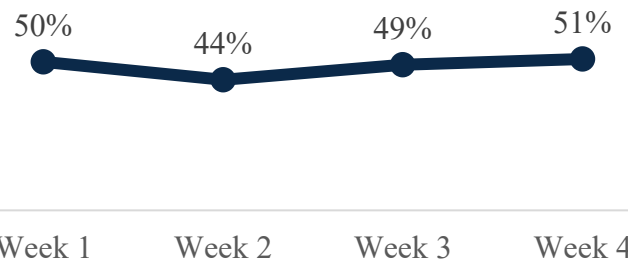
% of clients receiving outreach call at least one week prior



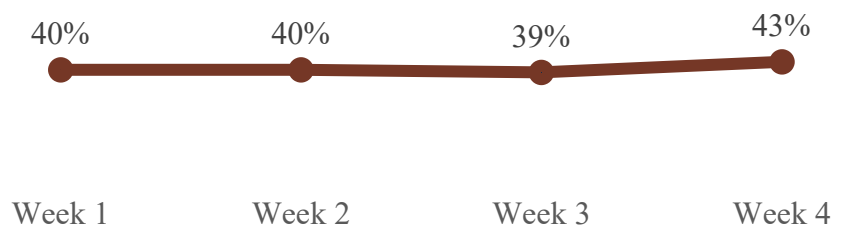
% of clients reporting strong relationship with case manager



% of calls that resulted in successful contact



% of clients participating in case management



How could we make this dashboard more **informative**? Readers should be able to determine in 5 seconds whether they are on track.



Commit to a cadence of accountability

Meeting and making commitments

/ **Hold short WIG sessions to check in on progress**

- These are meetings to report out on progress on tasks
- They should be short (20-30 minutes); consider huddles as needed (less than 15 minutes)
- Held at least weekly
- Include the people who are responsible for implementing the strategy

/ **Follow a structured session agenda**

- Account: Report on commitments from the prior meeting
- Review the dashboard: Discuss successes and failures
- Plan: Clear the path and make new commitments

/ **Make commitments at each meeting on specific action items to influence the lead measures**





Questions?



Announcements

/ For more resources:

- Stay tuned for an upcoming office hours focused on developing effective dashboards
- The HMRF Grantee Resources site (<https://hmrfggrantresources.info/continuous-quality-improvement>) contains CQI template, instructions, office hours slides, tip sheets, and other CQI resources
- Reminder about a new resource: [Scaling and sustaining gains from CQI](#)
- For more on goals: [Guiding CQI with SMART goals](#)
- For more on team facilitation: [Facilitation strategies for fostering discussion](#)

/ **Submit questions to hmrfcqi@mathematica-mpr.com**