

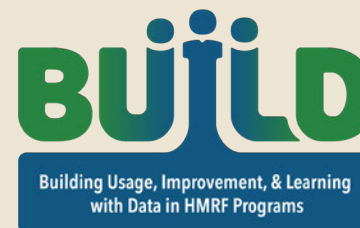
Using learning and reflection questions to enhance CQI efforts

Continuous quality improvement (CQI) office hours

March 28, 2023 | 2:00 – 3:00pm ET



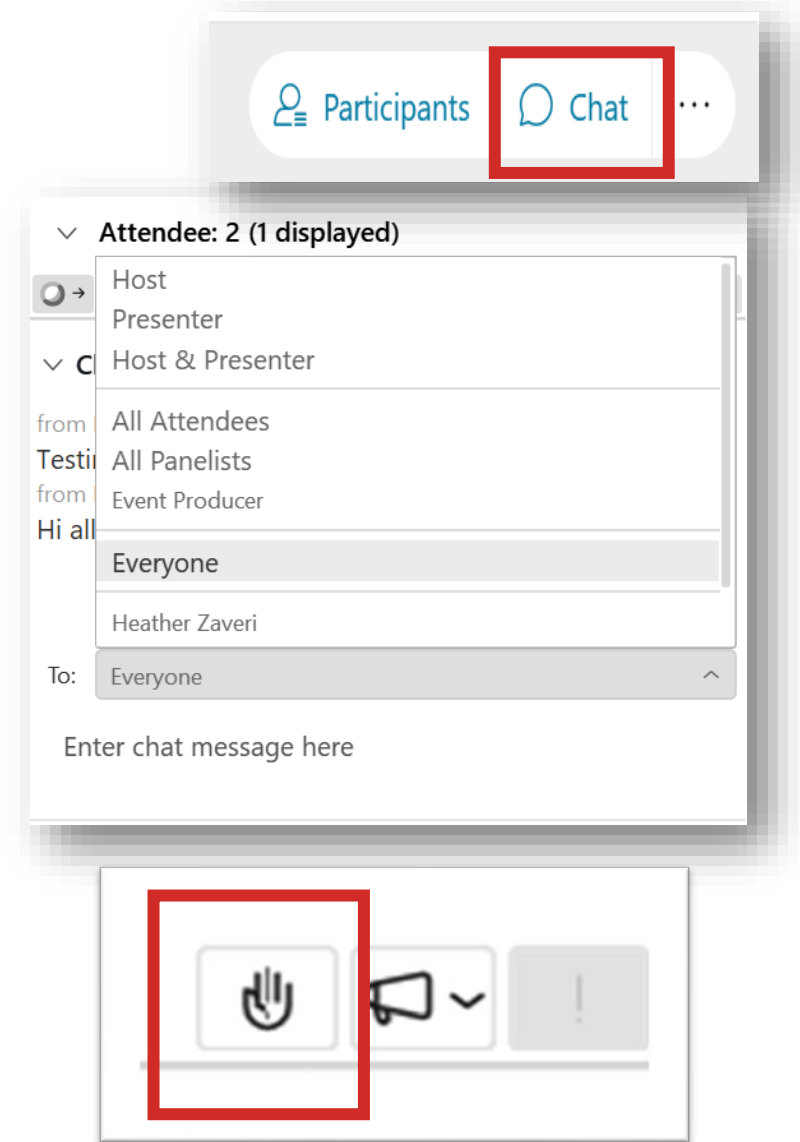
OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families





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**





Focusing on your CQI challenges

**A common CQI challenge:
Moving too quickly through
the CQI cycle and missing
key insights**





Today's agenda

- / **How learning and reflection questions support CQI**
- / **Pause points in the CQI cycle**
- / **Resource previews:**
 - Learning questions tip sheet
 - CQI cycle decision tree tool



How learning and reflection questions support CQI



Why pause to learn and reflect

- / Asking questions at key points in the CQI cycle prompts your team to be clear on what you hope to learn, push beyond assumptions, reflect, and adopt a culture of learning
- / Three types of questions that support CQI efforts



Framing questions
Be clear on what you hope to learn and why



Probing questions
Dig below the surface or initial take



Reflection questions
Take stock of lessons learned



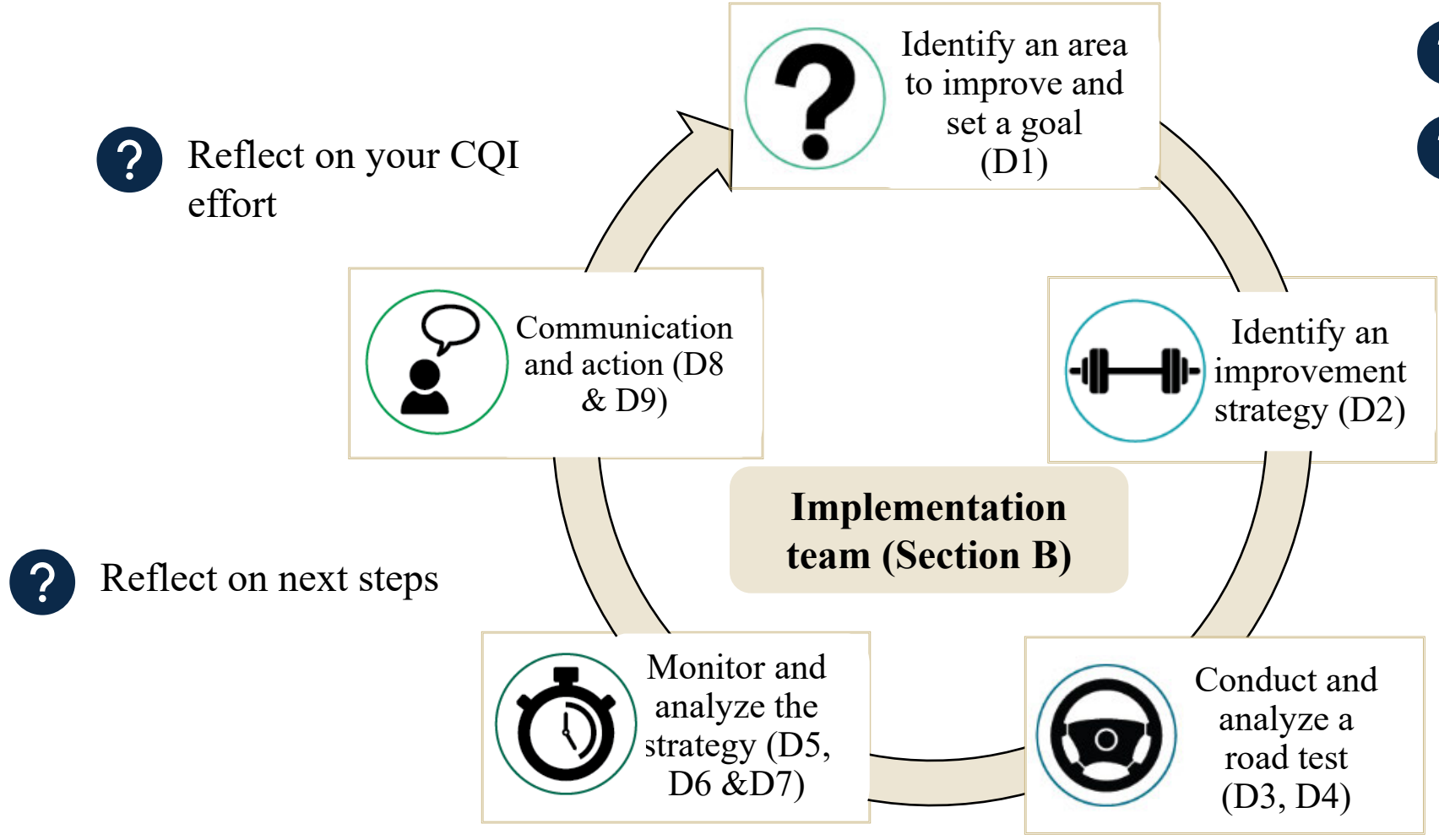
Learn and reflect through the cycle

Use questions to:

- ? Frame your CQI effort
- ? Drill down on your challenge

- ? Frame strategy brainstorming
- ? Vet strategy ideas

- ? Articulate what you hope to learn in a road test
- ? Reflect on information collected in a road test

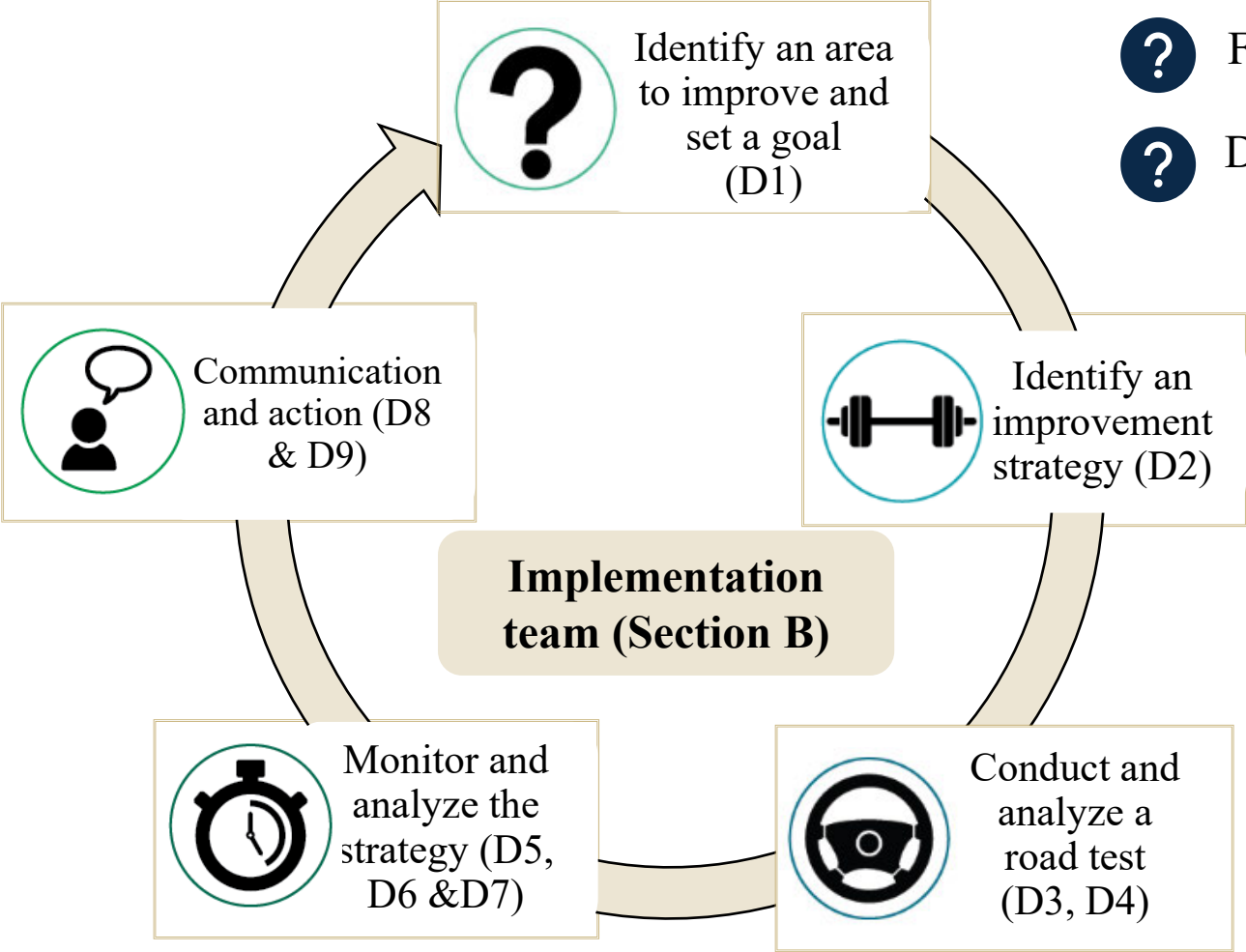




**Learn and reflect: Step 1,
Identify an area to improve
and set a goal**



Learn and reflect: Step 1



Use questions to:

- 🔍 Frame your CQI effort
- 🔍 Drill down on your challenge



Use a framing question to be clear on what you hope to address through CQI

/ Why Step 1 in the CQI cycle is an important pause point for framing:

- An opportunity to agree on and name your high-level question to be clear about what the team needs to address through CQI
- A well-articulated question helps to organize the effort (what do you need to address and what's considered outside the effort?)
- It can be grounding to come back to framing questions throughout your CQI effort as new issues emerge that can take the team off course

/ Example:

- How can we enhance recruitment of young mothers into our program?



What makes a strong CQI framing question?

/ **Open and exploratory**

- Stems from genuine curiosity
- Starts with how, what, when, where, or why? The answer to the question shouldn't be yes/no!

/ **Relevant to those implementing**

- Involve your staff in the process of identifying your key question: What do they need to know to do their job well?

/ **Useful to answer**

- Answering the question should help to inform decision-making and guide your team in determining where to focus your CQI efforts

/ **Feasible to answer**

- Can answer it with existing data or data you can collect



Sources of CQI framing questions

Source	Definition	Example
Feedback	How staff or clients experience the program	How can we improve the enrollment process to reduce client frustrations?
Program monitoring	How the program is performing related to targets	How can we promote more consistent attendance at our workshops?
Assumptions	Whether assumptions underpinning the program are true	What is the best way to provide financial literacy content? Is our current approach of offering as a standalone workshop the best way to ensure clients receive the services?
Innovation	Where the program can reexamine practices or enhance services	What if all staff contributed to recruitment efforts? What would need to change to support all staff to participate in recruitment?



Menti: Share with us

/ **What's a key framing question you have about your program?**

- It can be related to a challenge, program assumption you hope to test, or idea for innovation
- It can start with “I wonder how” (or what, when, where, or why)





Using probing questions to drill down

/ **Why Step 1 is an important pause point for probing questions:**

- Initial challenges identified are often surface-level; in some cases, they are not challenges but symptoms of a deeper problem
- Use questions to break down your challenge before you start developing strategies; use data to inform responses
- Useful tool: The 5 Whys

/ **Example:**

- Why do we struggle to recruit young mothers? What are their barriers to enrolling?



Using the 5 Whys to unpack a challenge

Problem: Low enrollment **Why?**



Our workshop times aren't convenient for clients

Why?



Our target clients have wide ranging work/school schedules, which makes it hard to identify one time

Why?



We haven't clearly defined our target population, so we end up trying to recruit a broad group

Why?



We were worried about meeting enrollment numbers initially, so we started recruiting everyone

Why?



We thought a broad recruitment strategy would support higher numbers, but instead it has made our recruitment efforts unfocused



Menti: Share with us

/ Scenario:

- We have great attendance at our first workshop session and then see a big drop off (to 60%).

/ What are your questions about this challenge? What do you need to know to break it down?

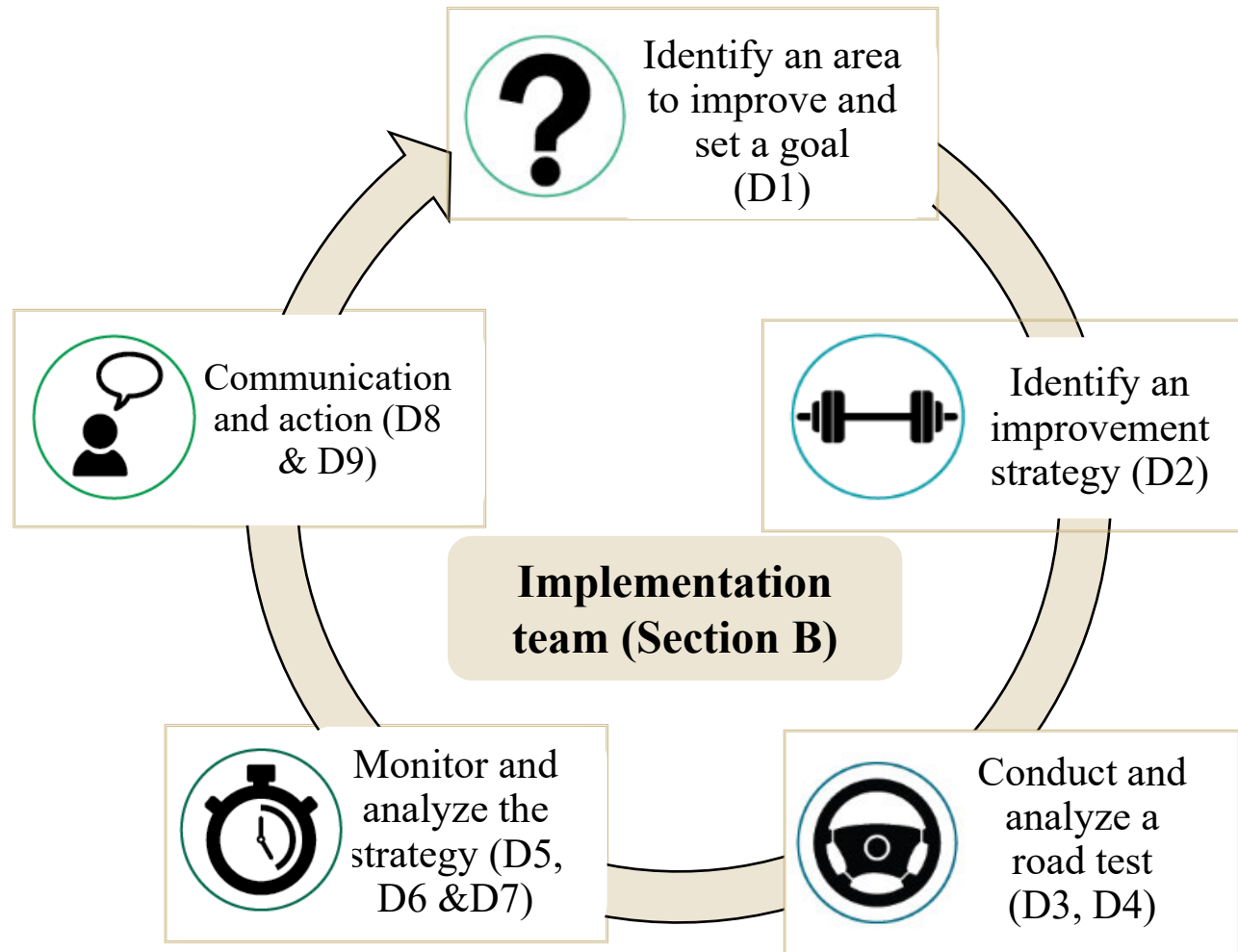




Learn and reflect: Step 2, Identify an improvement strategy



Learn and reflect: Step 2



Use questions to:

- 🔍 Frame strategy brainstorming
- 🔍 Vet strategy ideas



Use framing questions to brainstorm strategies

/ Why Step 2 is an important pause point:

- Without framing the issue to solve, it could feel too big or all encompassing, leading to an unfocused brainstorming session
- Before brainstorming, come up with a ‘How Might We?’ question to frame ideation
- ‘How Might We?’ questions support relevant and creative ideas

/ Example:

- Challenge: The enrollment process is onerous—we’re losing clients as a result.
- Question: How might we make the enrollment process as fun as a workshop session? How might we streamline the process to only the essentials?



Menti: Share with us

/ Scenario:

- Your fatherhood program has an exit survey response rate of 60%. The program administers the exit survey on the final day of the workshop, so the low rate is driven largely by those who don't attend the final class.

/ Transform the challenge into a 'How Might We' question

- What's your big question to frame brainstorming? Be creative!





Use probing questions to vet strategy ideas

/ Why Step 2 is an important pause point:

- Teams sometimes move forward with their first idea that seems promising, but vetting the rationale for a strategy can bring to the surface key assumptions about how you believe your strategy will work
- Take the time to articulate the theory of improvement for your strategy – ask the team: How will this strategy influence a key root cause? And why will that support improvement on our SMART goal?

/ Example:

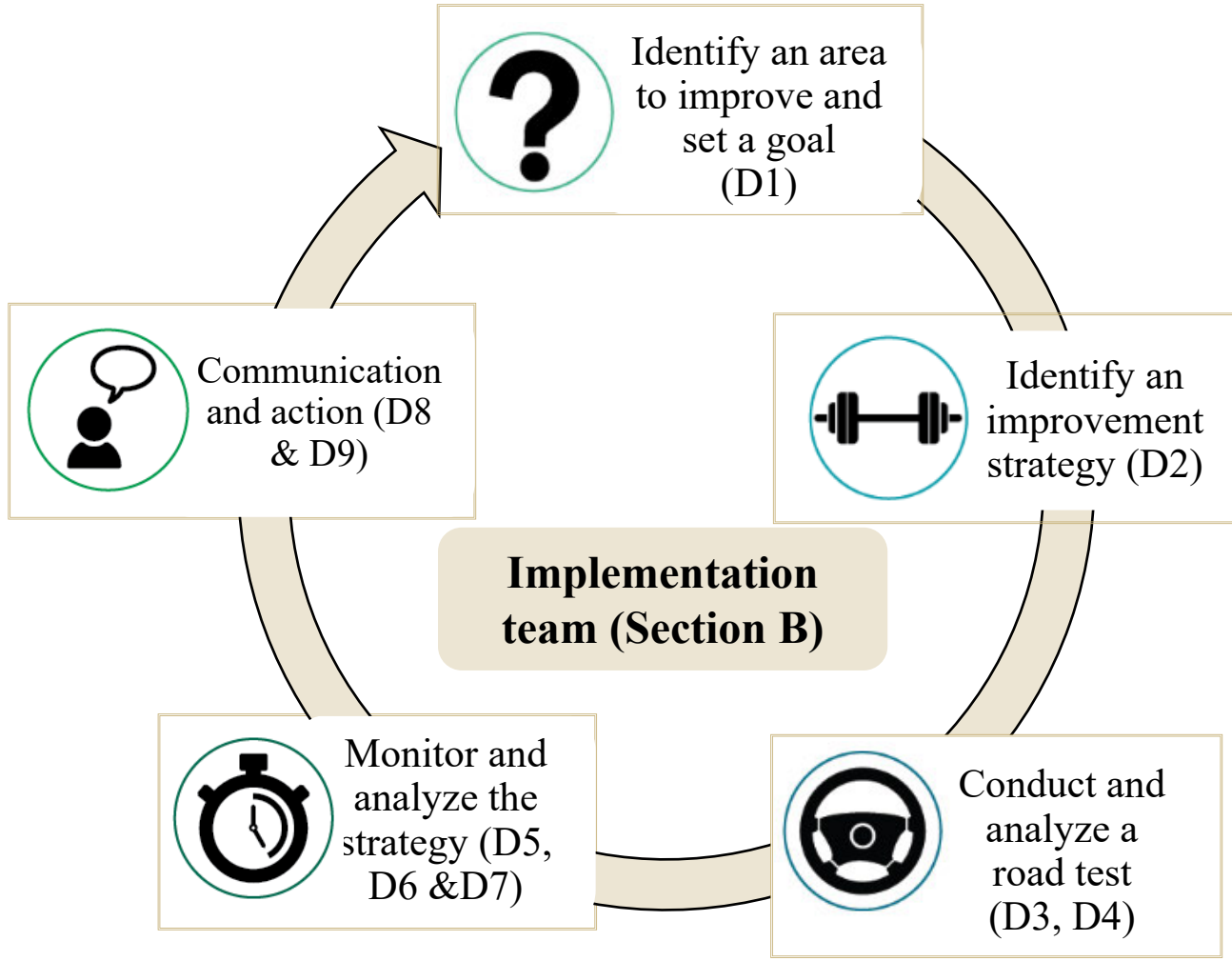
- We decided to offer incentives to boost our survey response rate. Is motivation to complete the exit survey a key root cause?



Learn and reflect: Step 3, Conduct and analyze a road test



Learn and reflect: Step 3



Use questions to:

- Articulate what you hope to learn in a road test
- Reflect on information collected in a road test



Using framing questions to articulate what you hope to learn in a road test

/ **Why Step 3 is an important pause point:**

- When planning a road test, start by articulating your key questions, as this makes clear what you need to learn and helps to inform data collection in your test
- Learning questions also support your team with analysis, as the team can organize data and information collected by key learning question to help make sense of data gathered

/ **Example:**

- Strategy: Incentives for survey completion
- How do staff inform clients about the incentives? Are clients aware of the incentives? Are the incentives motivating?



What makes a good learning question?

/ **What to ask about:**

- Uncertainties related to implementation (e.g., is it feasible?)
- Questions about how staff, clients, or partners will experience the strategy
- Questions about contextual factors that might influence the strategy (e.g., will partners be motivated to support this strategy?)
- Assumptions about how the strategy will influence short-term outcomes (e.g., testing your strategy rationale)

/ **What not to ask about:**

- Strategy effectiveness (road tests aren't causal!)
- Long-term outcomes



Menti: Share with us

/ Scenario:

- Your fatherhood program has an exit survey response rate of 60%. The low rate is driven largely by those who don't attend the final class.

/ Strategy:

- Have case managers text clients to remind them to attend the last class. We will further incentivize clients by holding a celebration during the final class.

/ What learning questions would you ask?





Using reflection questions to review road test data

/ **Why it's an important pause point:**

- Road tests aren't intended to end with a yes or no but, rather, identify more nuanced findings to inform adjustments
- To identify nuanced findings in your road test data, ask structured questions about different aspects of the strategy

/ **Example:**

- What worked consistently well or not well? What was inconsistent?
- For whom did it work well or not?
- How can we build on strengths or address challenges?
- Don't forget to return to your learning questions!



New resource: Developing learning questions to guide road testing and reflection

/ Information on what makes
a strong learning question,
how to develop them, and
how they support
reflection



Using learning questions to guide road testing and reflection

Learning questions are an important component of a successful CQI road test. Your CQI team should develop learning questions when you start planning to test an improvement strategy. This prompts your team to intentionally consider and align on what you need to know about how the strategy works before you test it. Your learning questions will also inform the data you need to collect during the road test. During and after the road test, use your learning questions to make sense of the information you have gathered and to develop evidence-informed next steps. This tip sheet walks through how to develop useful learning questions to frame a road test and use them to guide reflection at the end of a CQI cycle.

What types of questions are appropriate for a road test?

Learning questions should focus on the quality and feasibility of implementation and short-term outcomes. They are typically related to time (how long did it take?), process (how did you do this?), or response (how did you experience it?). Learning questions can also tie to outputs (did the strategy appear to facilitate more referrals?) and short-term outcomes (were clients satisfied with the strategy?). Learning questions should not focus on long-term outcomes or effectiveness, as a road test is not designed to answer causal questions. When developing learning questions, CQI teams should consider:



Uncertainties related to how the strategy will work

For example, you may be interested in learning whether clients will engage with a new service or program component, and what factors affected their participation level.



How staff, clients, and partners experience the strategy

Ensure you are accounting for a range of perspectives. For example, you may be interested in learning about supports staff need to implement the strategy, as well as client and partner satisfaction with the strategy.



Contextual factors that might influence implementation

A strategy is not implemented in a vacuum. Develop questions related to contextual factors that may help or hinder implementation to learn how to address those factors. For instance, how did agency leadership help or hinder our ability to execute the strategy?



Assumptions about how the strategy will work

The main goal of a road test is to understand how your strategy works, with a focus on strengthening the design and implementation. Develop questions related to the rationale for your strategy that you spelled out in section D2 of the HMRF CQI plan template. This speaks to how you assume the strategy will work. Use a road test to explore these assumptions—what outputs or short-term outcomes are you hoping to see that will support progress toward your long-term goals?

Not sure what to ask? To ask questions, you need a well-defined strategy and a detailed account of what you plan to do. A useful framework for defining a strategy is the 4Ps¹: Ensure you have spelled out the *people* implementing the strategy; *processes and practices* to implement the strategy; *products*, or tools and resources needed to support implementation; and *principles* that will guide proper implementation (e.g., coaching must be trauma-informed). Then, ask questions about those components. For example, did our training adequately prepare staff to provide trauma-informed coaching?

What process works well for creating learning questions?

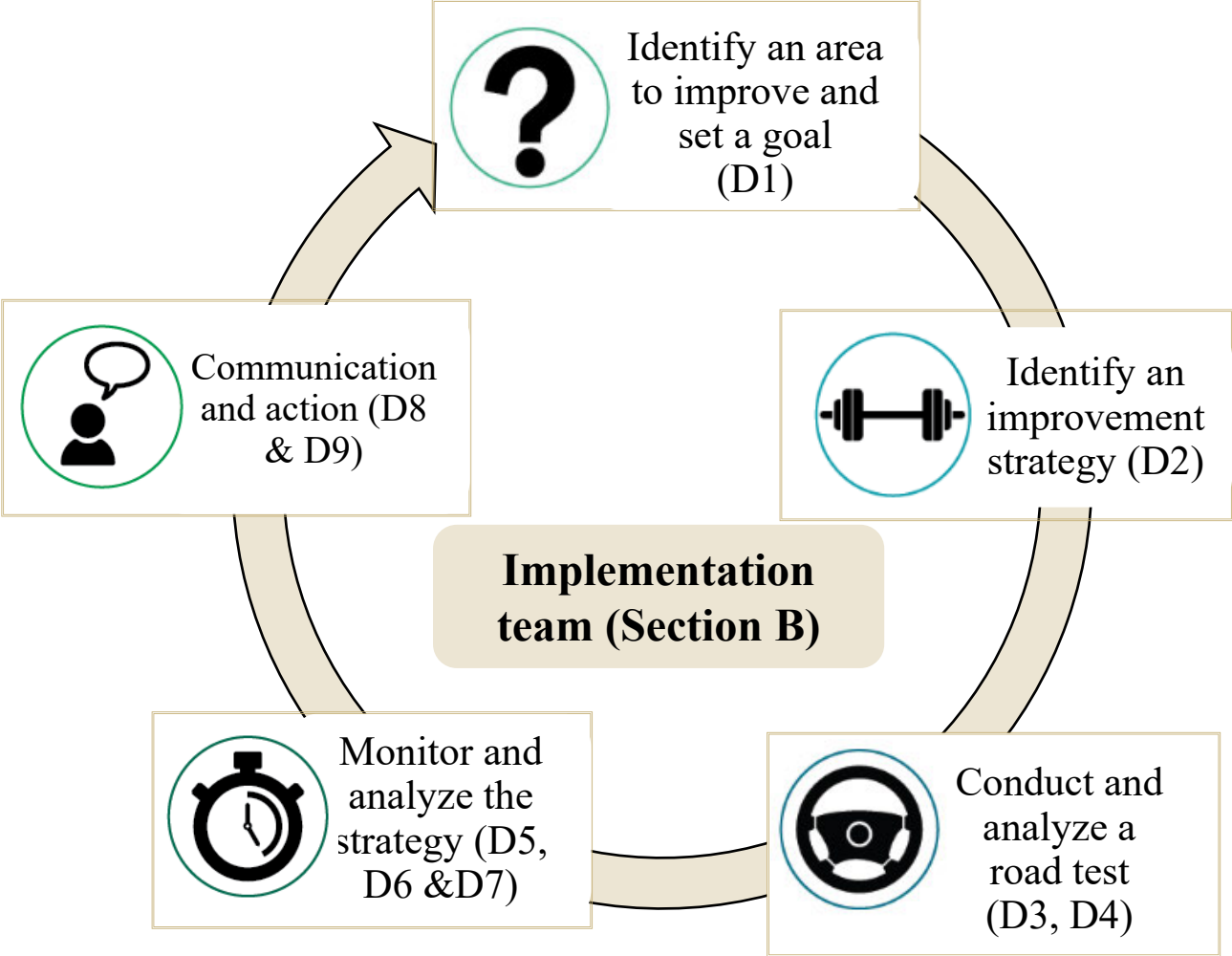
When developing learning questions, gather input from the CQI team as well as relevant staff, such as those who will be responsible for implementing the strategy. One way to accomplish this is to give staff 3-5 minutes to brainstorm questions on sticky notes, then cluster and refine questions. Ensure questions are exploratory,




Learn and reflect: Steps 4 and 5, Monitor the strategy and communicate



Learn and reflect: Steps 4 and 5



Use questions to:

 Reflect on next steps



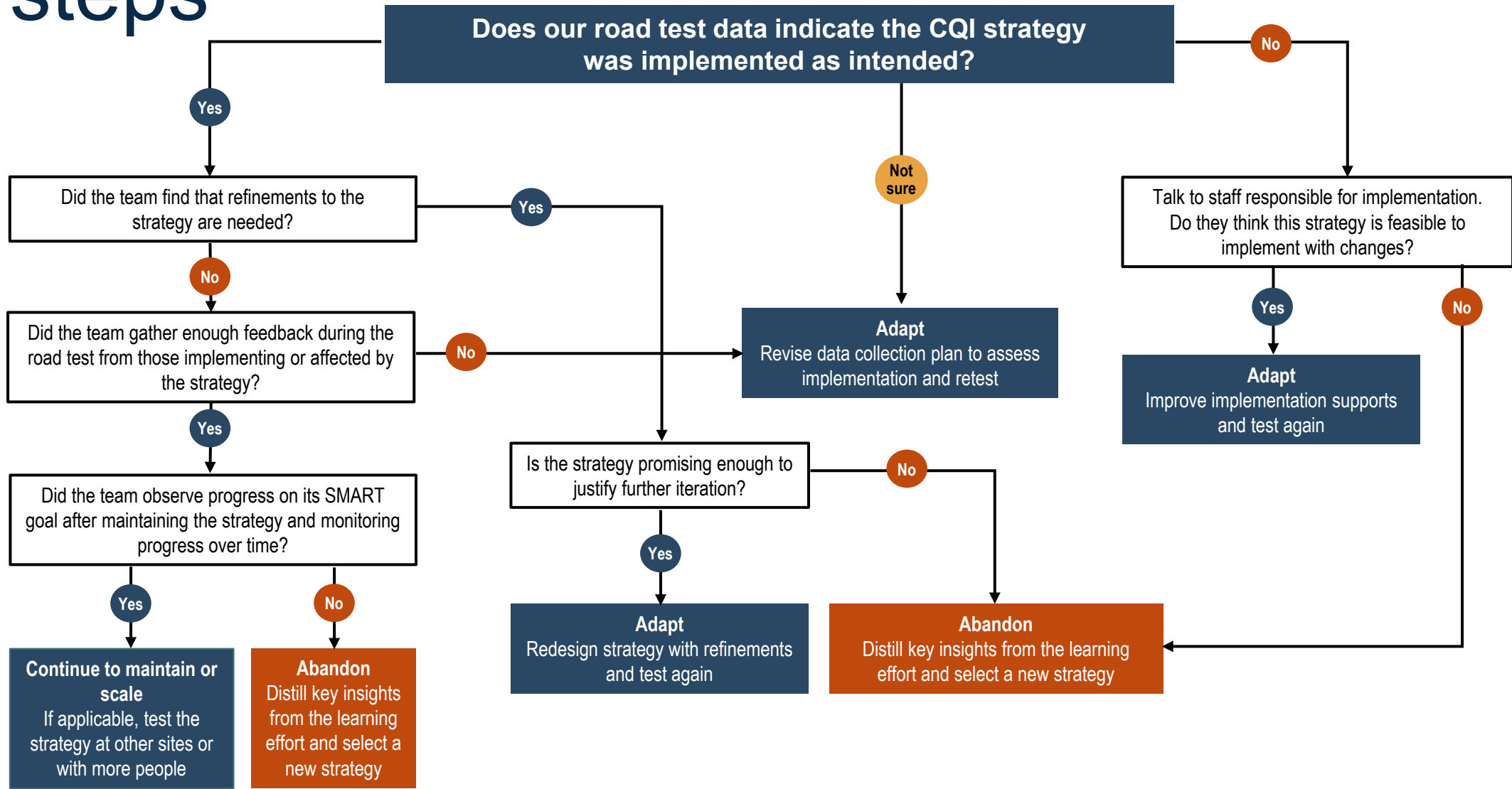
Using reflection questions to make evidence-informed decisions about next steps

/ **Why Steps 4 and 5 are important pause points:**

- You can identify nuanced lessons learned from a road test and still not have clear idea about your next steps
- Start with an assessment of implementation, consider a need for refinements, and determine next steps
- Useful resource: CQI road test decision tree contains questions to walk your team through different paths



New resource: Decision tree to guide next steps





Share with us

/ What do you consider when deciding whether to move forward with a strategy you road tested?





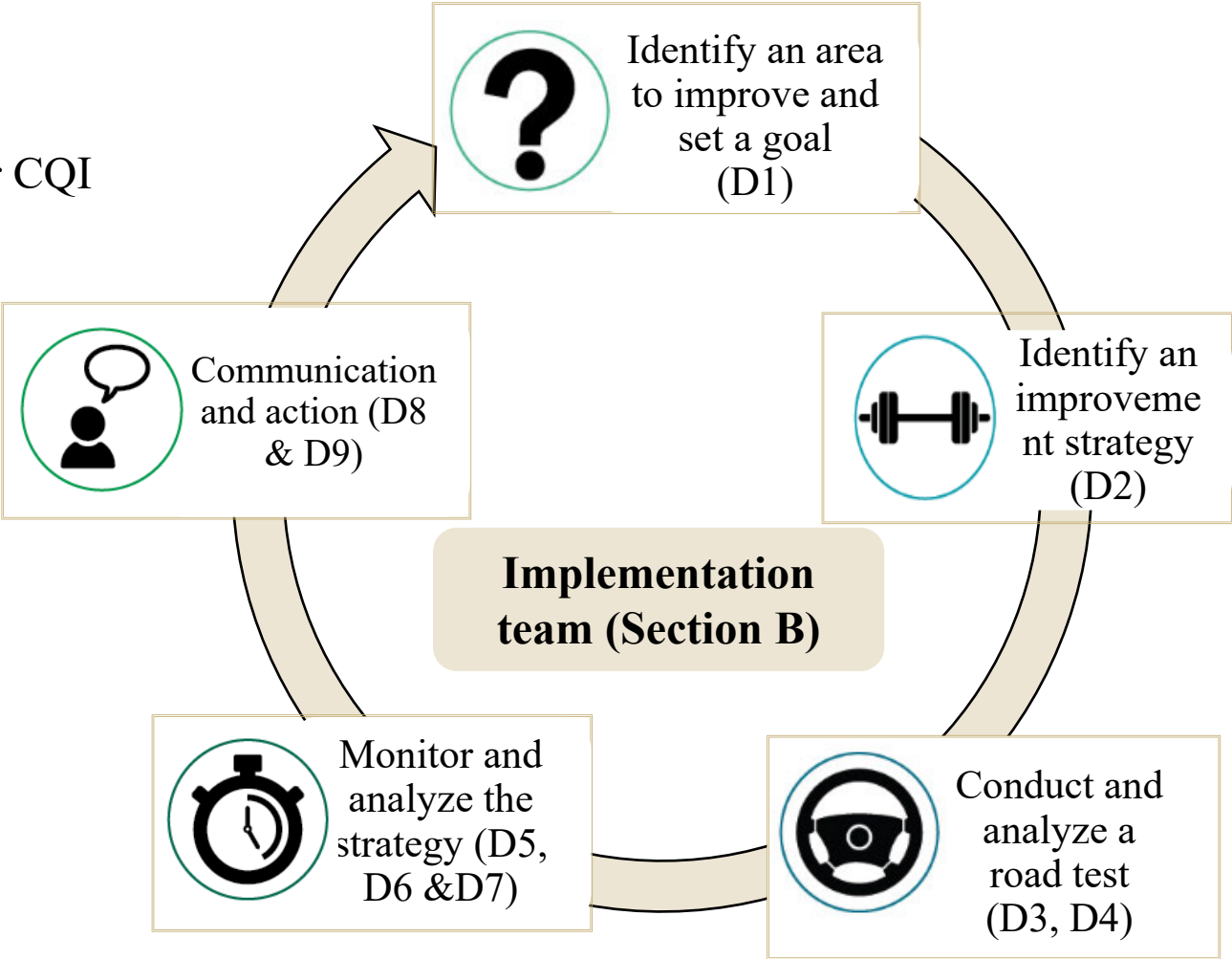
Learn and reflect: After a CQI cycle



Learn and reflect: After a CQI cycle

Use questions to:

- ? Reflect on your CQI effort





Using reflection questions to assess your CQI effort

/ **Why it's an important pause point:**

- It's important to engage in CQI related to your CQI efforts!
- As a team, reflect on what went well and what you would change going forward
- A structured feedback activity like Rose, Bud, Thorn is useful

/ **Example questions**

- How did we do at including staff and client voices in our efforts?
- How well did we communicate about the CQI effort with staff who were not involved?
- How well did our CQI team work together?



Announcements





Announcements

/ **Next office hours is on April 25, 2-3pm ET**

- Featuring a streamlined approach to documenting CQI plans and lessons learned

/ **For more resources:**

- The HMRF Grantee Resources site (<https://hmrfggrantresources.info/continuous-quality-improvement>) contains CQI template, instructions, office hours slides, tip sheets, and other CQI resources
 - Upcoming tip sheets:
 - *Using a CQI decision tree to make evidence-informed decisions*
 - *Using learning questions to guide road testing and reflection*
 - *CQI plan worksheet*

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



Thank you!