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**
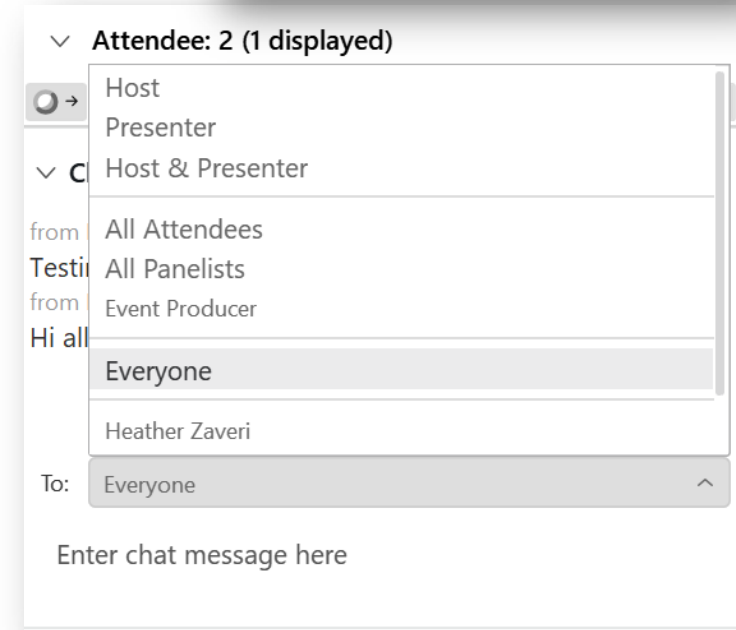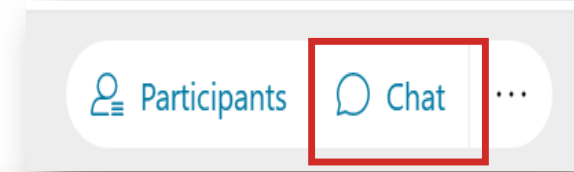
Today's agenda

/ **Supporting a data-driven culture throughout your program**

/ **Capacity to use data**

/ **Processes to support data use**

/ **Learning mindsets**

/ **Announcements**

Supporting a data-driven culture throughout your program

In a data-driven culture…

/ **Staff at all levels regularly ask questions and draw on data to answer them**

- Should not be limited to program leadership or data and evaluation staff
- But the nature of questions may vary based on where staff sit in the program

/ **Different kinds of data are used to answer questions**

- Data isn't limited to quantitative metrics (e.g., in nFORM)
- It may also include collecting client feedback in a systematic way to inform next steps

All staff ask questions and use data to…

/ **Monitor their own work**

- Track individual activities towards goals and drill down on barriers to progress
- "At which recruitment events was I most successful in driving interest in the program?"

/ **Monitor program performance**

- Keep track of whether the program, as a whole, is meeting targets; all staff have a role in contributing to these goals but may need support to see how
- "Did we meet enrollment targets in Q3?"

/ **Inform improvements**

- Dig into a challenge to enhance understanding
- Use data to help plan, implement, and scale improvement strategies
- "Who did we struggle to recruit in Q3?"

How do we help all staff use data to guide their work?

/ Capacity to use data

- Are staff aware of the data available to guide their work?
- Do they know how to access and use the data?

/ Processes to support data use

- Does the program have routines or structures to support and promote the use of data?
- Is there recognition and celebration for data-driven decision making?

/ Learning mindsets

- Does leadership actively promote use of data among all staff?
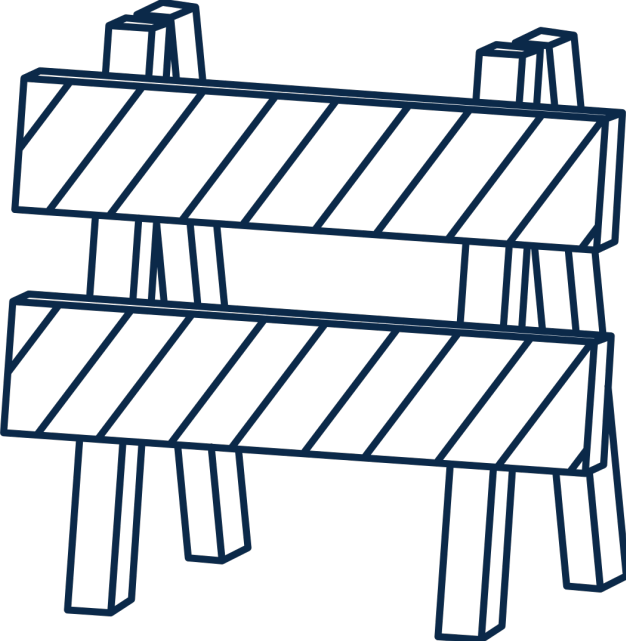- Do staff feel confident that using data will help them in their work?

Capacity to use data

Barrier: Lack of access to or awareness of the data available

Examples of how staff can use data on the ground to influence program goals

/ **Case managers:**

- Program goal: Increase participation in sessions
- Data for action: Dig into individual service contacts and attendance data to determine when clients stop engaging

/ **Facilitators**

- Program goal: Enhance engagement in sessions
- Data for action: Use in-session pulse checks to ask clients to rate new icebreakers being tested

/ **Recruitment staff:**

- Program goal: Boost enrollment
- Data for action: Track and monitor which recruitment events and locations drive the most inquiries/interest in the program (using prospective participant sign-up sheets)

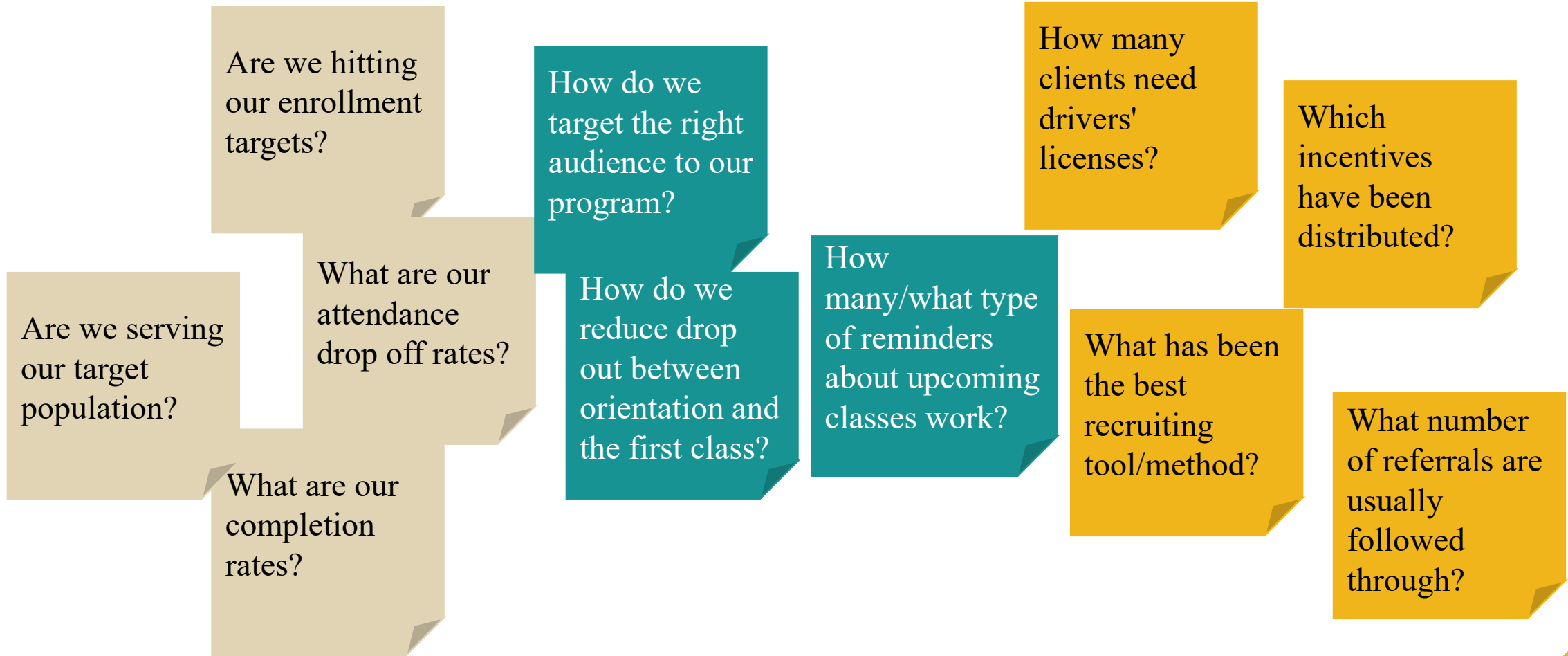# Do staff have access to and awareness of the data they need to assess their work?

Data and evaluation staff: Data to inform strategy and inform changes

Leadership: Data to monitor performance and keep the program on track

Direct service staff: Data to guide actions on the ground

Tip: Encourage a culture of curiosity to direct the right data to the right people

Are we hitting our enrollment targets?

How do we target the right audience to our program?

How many clients need drivers' licenses?

Which incentives have been distributed?

Are we serving our target population?

What are our attendance drop off rates?

How do we reduce drop out between orientation and the first class?

How many/what type of reminders about upcoming classes work?

What has been the best recruiting tool/method?

What are our completion rates?

What number of referrals are usually followed through?

A useful tool to help all staff be data-driven

HMRF Data-Driven Questions Worksheet

Everyone has a role in data-driven program improvement. You can use data from nFORM 2.0 and other sources to monitor progress towards your own and your program's goals. Use this worksheet to record questions you have about your HMRF grant work. Then, discuss your questions with your HMRF data manager who can help identify and obtain the information needed to answer your questions. Review the information with your data manager to formulate answers to your questions and identify next steps. Next steps can be both immediate (how can I address what I found?) and ongoing (how can I review my work and address issues on a regular basis?). If you and your data manager need assistance identifying nFORM 2.0 information sources, contact the nFORM 2.0 help desk by either submitting a ticket through the help tab of nFORM or emailing us at nform2helpdesk@mathematica-mpr.com. We are happy to help!

Question	Information source(s)	Answer(s)	Next Steps
Example (case manager): How did I do in the prior two-week period in meeting with each client at least once?	*Example:* The nFORM 2.0 individual service contact operational report includes data on the number of substantive and reminder-only contacts provided to clients	*Example:* The detailed page of the report shows that I have provided at least one substantive individual service contact to 9 out of my 10 assigned clients over the past two weeks.	*Example:* 1. Follow up with the client who I did not meet with in the past two weeks 2. Ask my grant's data manager to generate the individual service contacts report every two weeks to make sure I am providing and recording all service contacts according to my program's case management approach.

Blank rows included below examples to record questions, sources, answers, and next steps

What data in nFORM can help staff to answer their questions?

Query Tool	**Operational Reports**	**Data Export**
⬇	⬇	⬇
Review summary level information on enrollment, client characteristics, workshop participation, individual services, and client outcomes	Review summary and client-level information on enrollment, survey administration, workshop participation, and individual services	Review all program and client information ever entered into nFORM except for PII (i.e. client names, DOB, contact information and case notes)

What other data might be useful to staff?

/ **To monitor actions**
- Example: "How many recruitment events have we held this year?"
- Existing data in another system or new data collected in a tracker

/ **To drill down on a challenge**
- Example: "Which workshop activities are least engaging?
- Other existing or new quantitative data to isolate when? Where? For whom?
- Qualitative data (workshop exit slips, feedback surveys or a focus group with clients)

/ **Help staff make use of informal data sources that they create on a day-to-day basis (from administrative forms, informal observations)**

Example question and data sources

What has been the best recruiting tool/method?

Enrollment tab of the query tool shows the most common recruitment sources and reasons that clients enroll

Client info tab of the data export includes referral type and organization (if applicable)

Survey response tab of the data export includes how a client heard about the program and reason(s) why they enrolled

Share with us

/ **In your program, what kinds of data do frontline staff use to guide their work?**

/ **How do frontline staff become aware of data?**

In your program, what kinds of data do frontline staff use to guide their work?

fidelity logs

Class attendance, enrollment numbers

Data manager shares appropriate data with frontline staff regularly

We have a Salesforce data base and have created a dashboard for each staff type with reports that inform their work

query tool, looking at enrollment and how they heard about us to track the trends of our outreach/enrollment efforts

Weekly data meetings

We provide them brief reports

Weekly data meetings

we create summary sheets of completed cohorts to send to frontline staff positive and negative outcomes of student data and a basic summary

Weekly data meetings

Enrollment & completion data

Biweekly reports consolidating their outcomes.

Data graphs are sent to our individual programs

Enrollment and Graduation numbers every week. Provided by data manager.

Date of complete ACS survey

In your program, what kinds of data do frontline staff use to guide their work?

Evaluation staff send snapshots at the end of each series

data manager sends reports to Case Managers weekly or bi-weekly

attendance, enrollment, leads, registrations

fidelity logs, attendance logs, ,weekly data meeting, local evaluator evaluations, quarterly and annual reports

As a leader, I try to make it accessible by making sure I use the data available to lead meetings that we have on an individual basis. I am still looking for a way to make it consistent and diversify

Creating more opportunities for out of the box thinking, creative strategies that still get to the numbers.

Enrollment and Graduation numbers every week. Provided by data manager.

Bi-weekly CQI reports

Biweekly CQI reports using Dosage detail report, survey completion report, client status summary report
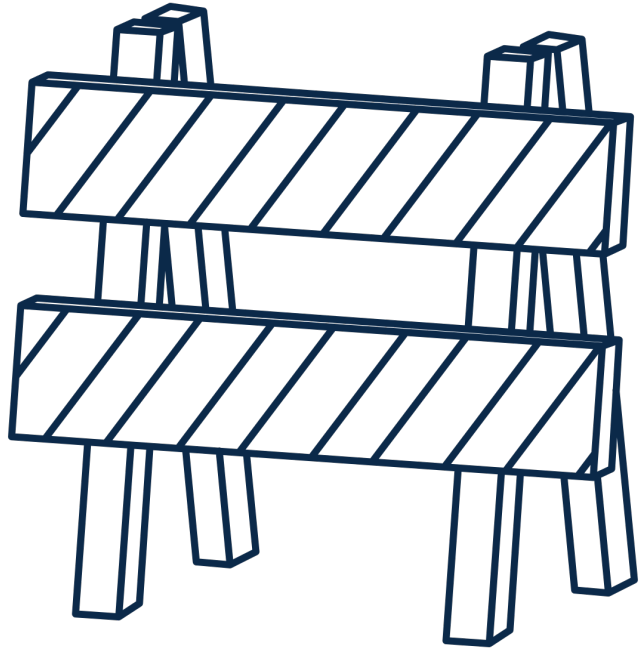
Staff use data as far as number of referrals followed up on and documenting case notes. Regular staff meetings.

Keeping Spreadsheets on own

Weekly Meetings Enrollment Completion numbers

Barrier: Lack of experience in using data

Tip: Help staff build confidence and experience in using data to guide their work

/ **Keep data reports simple by using clear, easily understood charts (bar, line charts)**

/ **Annotate charts**

- Make the title a primary takeaway

- Use callouts to highlight other takeaways

/ **Talk through data with staff to help them interpret it**

/ **Don't tell staff what the data says, ask: What do you notice? What does it mean (in terms of practice)? How does this inform next steps?**

Share with us

/ **What are your tips for helping staff build their capacity for using data?**

/ **For frontline staff, what tips would you give to program leadership for making data easier to use and interpret?**

What are your tips for helping staff build their capacity for using data?

Presenting data in multiple formats: words, charts, tables, etc.

In staff meeting, everyone bring up nFORM and navigate together

quantifying in percentages

Graphs and visuals, with explanations of how to interpret the data

To make it part of the regular conversation. To take time to explain why it's so meaningful: How it is directly tied to quality improvement, program delivery, client satisfaction, etc.

Open communication as to what is helpful and why.

Allow each individual program leader to have access to more reports to share with their individual teams

Visuals such as pie charts, bar graphs, etc

Have a current time to present results like weekly or monthly

Being frontline and CQI just really reporting what we encounter such as english speak vs non english speaking students

Utilize the query tool for data visualization

Weekly Meetings Making it actionable or actually helpful for what they do day to day

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What are your tips for helping staff build their capacity for using data?

present weekly grant outcome numbers and trends (enrollment/graduated completed) to show their efforts

we use "Spotlight" stories in our quarterly reports to funders and we celebrate successes for each cohort in a celebration

for leadership: one-on-one data informed planning for cohort facilitators/reviews at the end of cohort

Combine reports to add other fields for example adding the Case Manager's name so it is easier to identify their clients.

quantifying in percentages

When presenting data to staff, use best practices (limit color/pattern usage to meaningful uses, no 3D charts, highlight actionable meanings/insights rather than just reviewing data or stats, etc.)
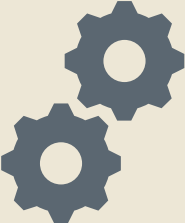
"Normalizing" it, specifically helping staff understand that they engage with data all the time (e.g., choosing to buy something based on reviews)

Data is readily accessible in a visual using software other than inform. Other info also provided weekly that is not accessible to everyone.
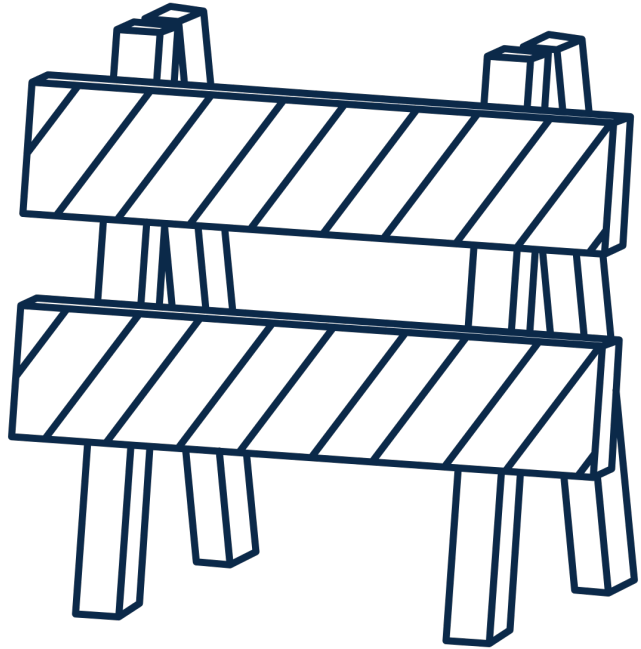
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Processes to support data use

Barrier: Lack of structure and support for using data

Tip: Create routines or structures to make using data the norm

/ **Does the program communicate and reinforce clear expectations about data use?**

/ **Use of cues, reminders, and nudges can reinforce the importance of data-driven decision-making**

- Routines, like huddles or meetings to discuss individual and team goals and progress toward them, can reinforce the importance of using data to guide improvement

Tip: Help staff monitor their own progress

/ **Staff-level goals that are tracked and discussed help staff use data to guide their work**

/ **The program has benchmarks that are helpful for assessing success; do staff have their own benchmarks?**

- For example, contact 50% of clients on caseload each week

/ **Individual goals can be motivating and help staff progress**

Example of using data to monitor progress on individual goals

/ **Goal:** Contact all clients in caseload at least twice per month

/ **nFORM data source:** Caseload detailed report

Staff Grantee Location	Staff with Case Management Capability	Assigned Client Study ID	Couple ID	Client Last Name	Client First Name	Client Status	Client Grantee Location	Enrollment Date	Most Recent Service Contact Date	Most Recent Workshop Session Attended Date	# of referrals requiring follow-up	# of incentives provided
Northside	McInerney, Hannah	40001025	10091	Halpert	Pam	Active	Northside	4/23/2023	6/16/2023	6/14/2023		1
Northside	McInerney, Hannah	40001024	10091	Halpert	Jim	Active	Northside	4/19/2023	6/6/2023	6/14/2023		1

Filter the Excel report by case manager and client status to identify active clients who should have received a service contact

Tip: Celebrate successes

/ **Are staff rewarded or recognized for using data to support progress?**

/ **Highlight instances of success**

- Example: The CQI team used nFORM enrollment referral source data to be more targeted with recruitment strategies and reached a SMART goal

/ **Highlight instances of using data**

- Example: A staff member used attendance data to determine which clients needed outreach each week

Share with us

/ **How does your program highlight success stories related to learning and improvement?**

How does your program highlight success stories related to learning and improvement?

Shout outs during biweekly data meetings

During meetings with all partners involved

shoutouts/accolades at monthly and weekly meetings, implementing successful ideas across the program once field-tested

We start with giving "knuckles" or fist bumps to our program staff at every CQI meeting to celebrate successes

We have a weekly meeting and share our successes.

Announcements and staff certificates shared during meetings

When we present outcomes to staff, such as during CQI road test analyses, we highlight what staff did right and where their outcomes improved compared to the past.

case managers using sessions series attendance to track and audit workshop attendance

How does your program highlight success stories related to learning and improvement?

Qualitative-gauging folks authentic experiences

Use our communication channel to highlight good results

Qualitative data-to gauge the authentic experiences of clients

Discuss in meetings!

as an individual team, we hold weekly meetings where we not only staff participants but also share shout-outs!

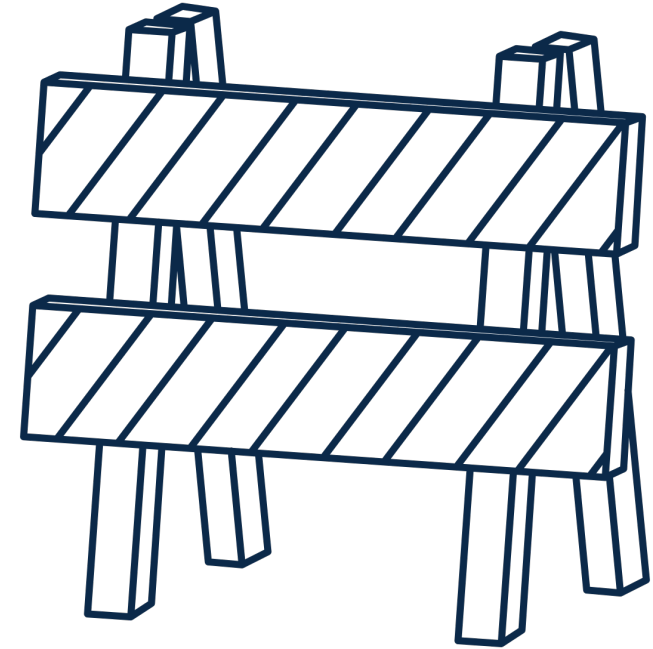Share dashboard highlighting reached goals!

Learning mindsets and attitudes toward data

Barrier: Lack of buy-in for using data at all levels of the program

Mindsets that prevent broad buy-in for using data

/ **We have data staff who monitor the numbers, so we're covered!**

- Having centralized data capacity is a benefit to the organization; however, relying on a select few champions prevents all staff from using data for learning and improvement

/ **Staff are too busy or don't have experience using data**

- Data is a tool to help staff do their jobs more efficiently and effectively
- If it's not, are you providing the right data?

Tip: Model data use and communicate expectations

/ **Program leadership, data managers, and CQI team have a strong role in modeling data-driven decision making**

- Use data in team meetings (e.g., reserve time to discuss client satisfaction results and solicit ideas for improvement)
- Share insights to demonstrate the value of data in tackling challenges

/ **But be sure to communicate that using data to guide decisions is an expectation for all staff**

Tip: Ensure staff know how they contribute to key program goals and can assess their actions

/ **Do all staff know their role in contributing to the program's improvement aims?**

- Do staff have a clear picture of how their actions on the ground influence program goals?

/ **Are they able to assess their contributions to the program's improvement aims?**

- Do you share data related to their actions to help them make decisions using data?

Share with us

/ **What types of data do your staff value the most or find most relevant?**

/ **For frontline staff, what data is most relevant or useful to you?**

What types of data do your staff value the most or find most relevant?

We use the attendance data a lot!

Dosage detail report for survey completion and workshop completion

Enrollment and graduation numbers. ISC reports and attendance.

survey completion to help case managers stay focused on getting them completed

Client feedback data

Tracking progress towards completion

retention data, attendance data, feedback

Client attendance and meaningful contacts

Attendance data: monitoring retention. And survey data for outcomes of each class.

Enrollment and completion data are most useful for staff. The Data Manager likes the Data Export best because it can be used to answer almost any question.

What types of data do your staff value the most or find most relevant?

Number of cases

Enrollment numbers, job placements and retention rates

Attendance, status, surveys and reports

categories of referrals made to clients

Client participation and follow up, so that if clients fall off we can track the trends so that we can see where we can improve to keep dads engaged.

Enrollment, Completion, Survey completions

Attendance

entrance-exit survey changes in attitudes and behaviors, student feedback in local evaluator focus groups

Share with us

/ **What is one thing you can do differently to be more data-driven in your work? To strengthen a data-driven culture in your program?**

What is one thing you can do differently to be more data-driven in your work?

Ask staff what additional data they would like. Help them locate the data themselves if applicable.

Start by using the Data Driven Questions worksheets

Use the data to monitor individual goals

Why data is important

I need to make sure that as a data manager who uses data constantly my assumption that others value data in the same way that I do does not create a barrier.

More transparency around the data

Keep sharing specific staff the data that their work/role impacts to show successes and strategize for improvement if needed.

Making things more visual

Announcements

Announcements

/ **Back to the regularly-scheduled office hours!**

- Next nFORM office hours: July 11, 2-3 ET
- Next CQI office hours: July 25, 2-3 ET
- Invitations are coming soon!

/ **For more resources:**

- The HMRF Grantee Resources site (https://hmrfgrantresources.info/)
- Useful tool: Worksheet for supporting data-driven conversations
- New CQI resource: Using 4DX to support improvement efforts
- Submit questions to
  - nform2helpdesk@mathematica-mpr.com
  - hmrfcqi@mathematica-mpr.com

Questions?