

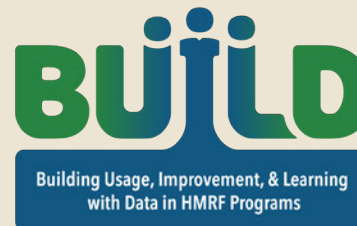
Using data to inform goal setting and monitoring

Continuous quality improvement (CQI) office hours

September 26, 2023 | 2:00 – 3:00pm ET



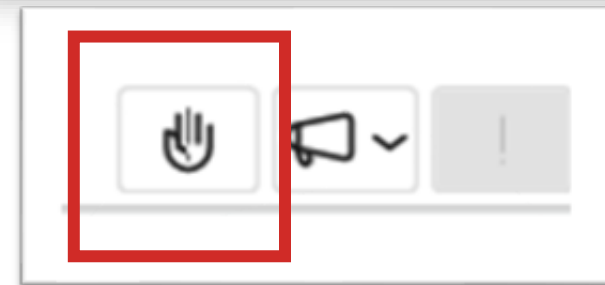
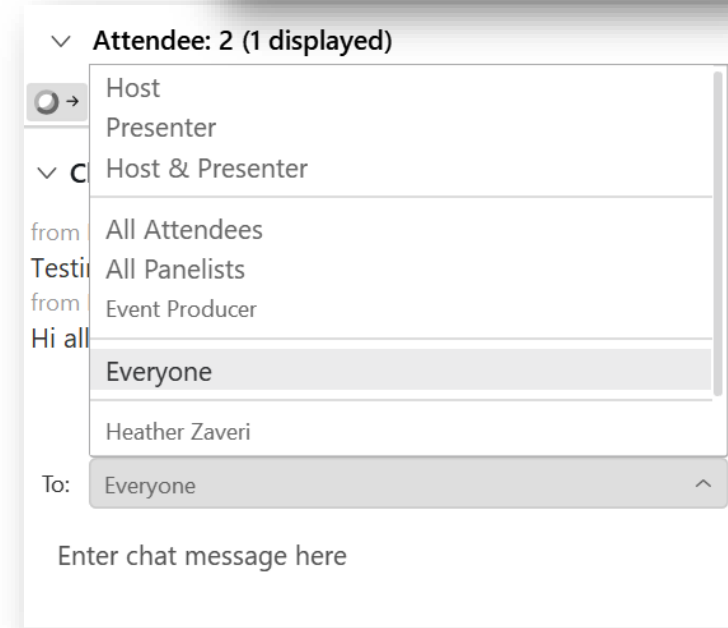
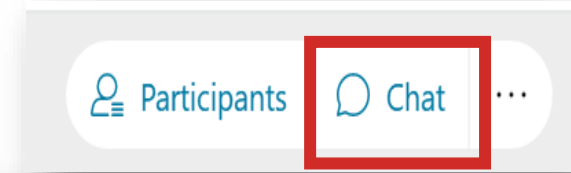
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How you can participate

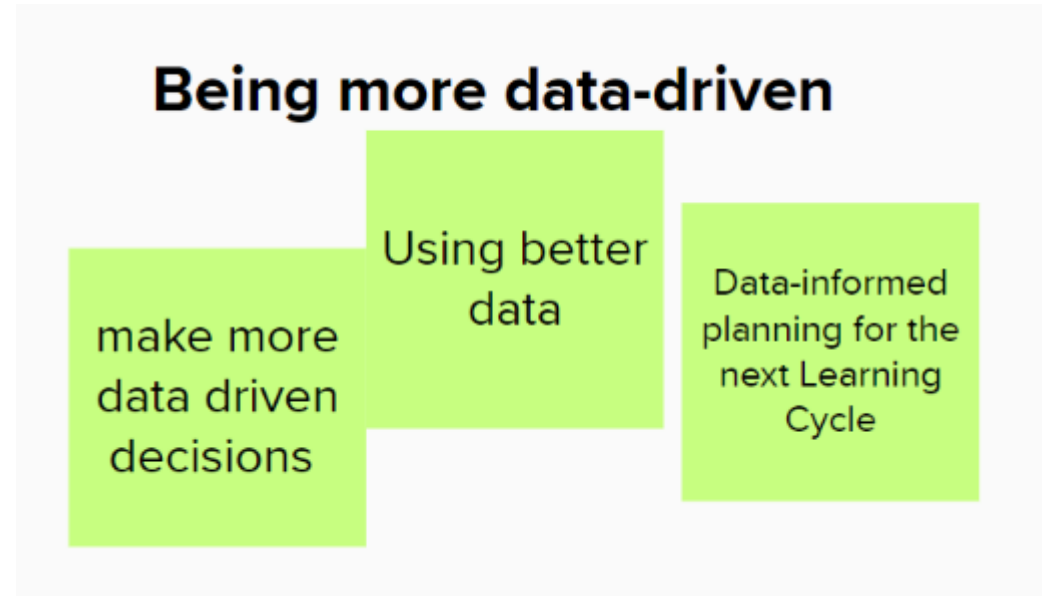
- / Use the chat to ask questions
- / Ask questions or share verbally using the hand raise feature
- / **REMINDER: Never text or email client personally identifiable information (PII), including during office hours or when contacting the TA teams**





Focusing on your CQI challenges

**A common CQI challenge:
Using data more effectively
to guide improvement**





Today's agenda

- / **Setting data-driven improvement goals**
- / **Example: Identifying partner-level referral targets**
- / **October's follow-up plan**
 - Tracking activities to monitor progress toward goals
 - Reviewing your tracker



Setting data-driven improvement goals



Terminology

/ **ACF benchmarks for enrollment and participation**

/ **Improvement goals**

- Wildly Important Goals (WIG)
- SMART goals
- Interim goals

/ **Targets**

- Grant-level targets for ACF benchmarks
- Internal targets for improvement goals



Select your goals and targets

/ **Program monitoring involves tracking performance on key benchmarks**

- Monitoring often focuses on key benchmarks (examples: annual enrollment target, target number of clients/couples to attend at least one primary workshop session, target number of clients/couples to attend 90% of primary workshop hours)
- Existing nFORM reports support strong monitoring

/ **Data tracking for CQI should be organized around a specific challenge and involve additional metrics**

- Start with a WIG, break it into interim steps, determine the activities necessary to support progress (lead measures)
- Tracking often involves metrics in nFORM, other systems, and new data the team needs to collect

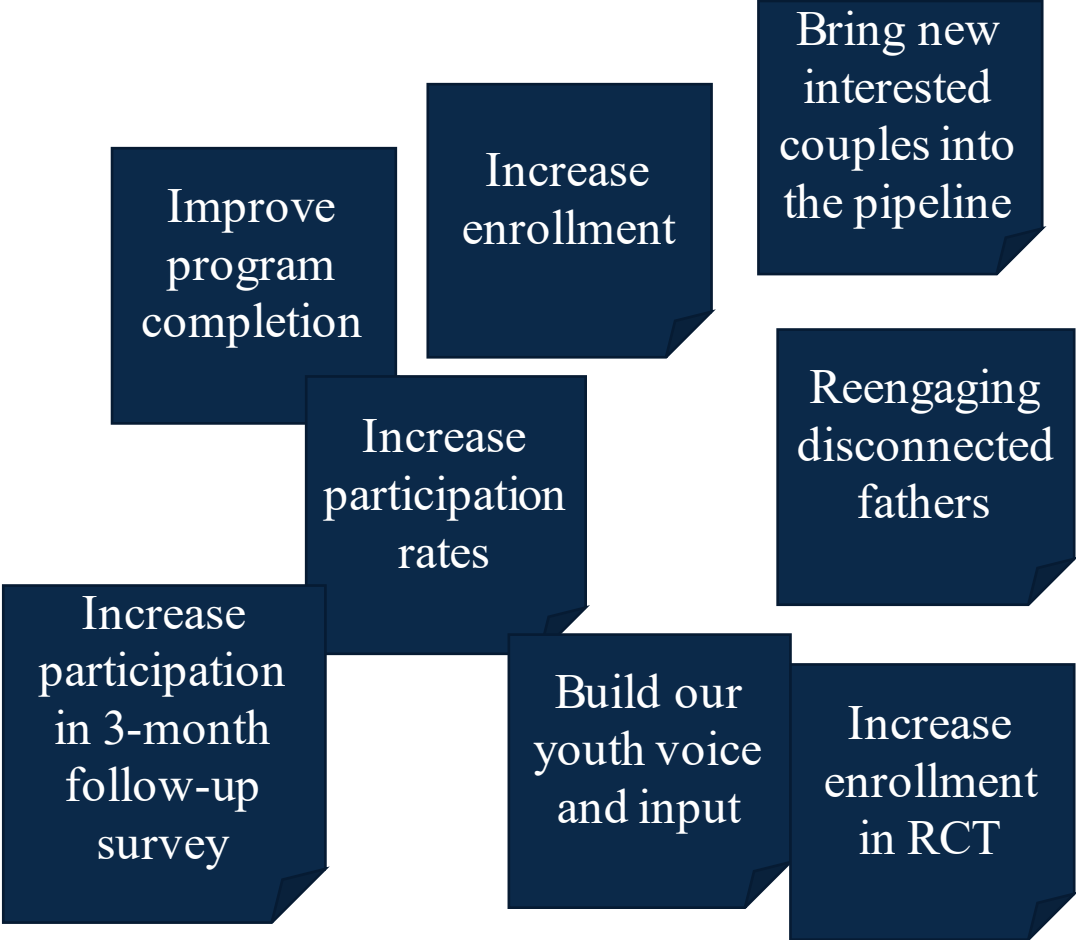


Start by defining your wildly important goal (WIG) or SMART goal

/ A WIG is the most important priority your team needs to address through CQI

- Examine performance relative to grant-level targets for ACF benchmarks
- Consider input from staff
- What must be addressed to progress?

/ Be data informed in narrowing in on your WIG and making it a SMART goal





Using data to define your WIG

/ **Start with your end goal and work backwards**

- Look at historical performance
- What will it take to reach your priority target?
- Consider the feasibility of different pathways to achieve your target

/ **Example: The CQI team decides the most important goal is to reach the program's annual target of 80 clients achieving the primary workshop completion benchmark**

- Enrollment target is met, but less than half of enrolled clients (40 of 100) now reach the completion benchmark
- Explore scenarios to reach 80 completers – what are the drivers?



Examine your attrition rate

/ **What percent of enrollees reach the completion benchmark? How many are we losing at each stage?**

/ **Of 100 clients that enrolled**



- 90 make it to first workshop session

- 80 attend half of primary workshop hours (20 drop out prior)



- **40 complete 90% of primary workshop hours (60 drop out prior)**



- 20 complete 100% of primary workshop hours (80 drop out prior)

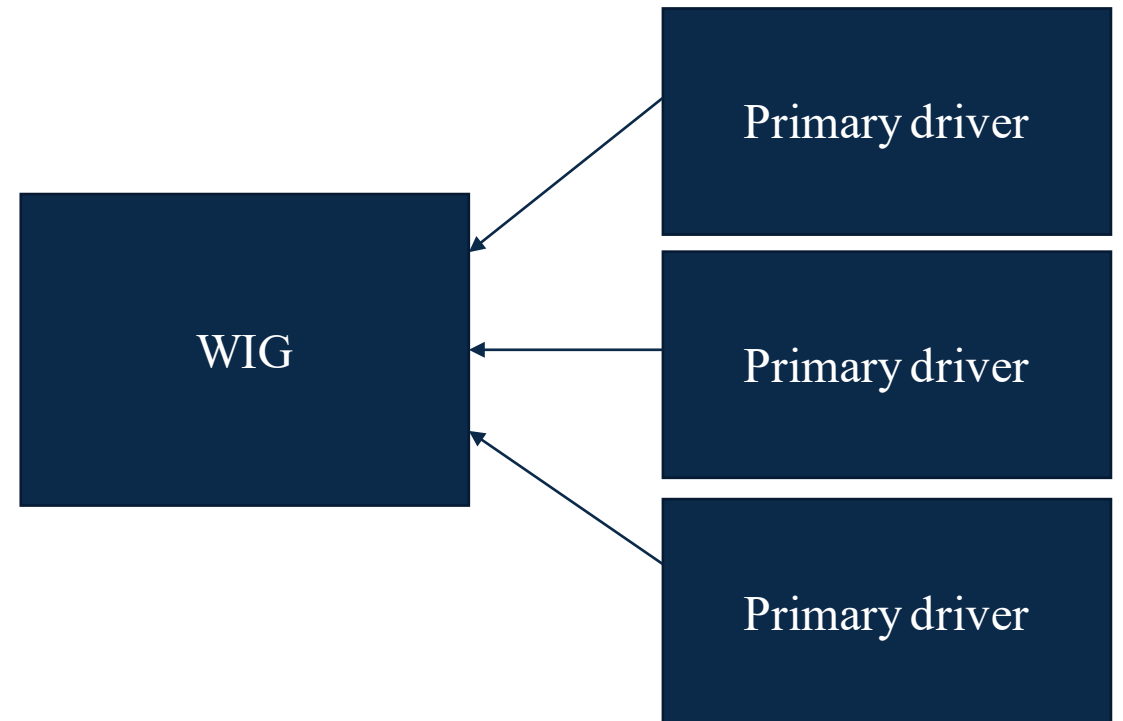
/ **To get to 80, is it more feasible to increase enrollments or reduce attrition?**



Assess feasibility of increasing enrollment

/ What levers or primary drivers impact your WIG?

- Example: **Increase enrollment**
 - Partner referrals
 - Direct outreach
 - Indirect outreach
- What are your enrollment sources?
- Where is there leverage to enhance enrollment within key sources?
- Can sources be expanded?





Use data to inform feasibility conversations

- / **Explore the team's performance related to primary drivers**
- / **For example, use nFORM to explore historical and recent trends in:**
 - How clients heard about the program
 - Reasons clients enrolled in the program
 - Referral rates from community organizations
 - See the August 2023 nFORM office hours on using nFORM to monitor goals, including how to track referrals by partner organization for enrolled clients



Use data to inform feasibility conversations (cont.)

/ **Does the team have the capacity to generate additional partner referrals, or enrollments from direct outreach or indirect outreach activities?**

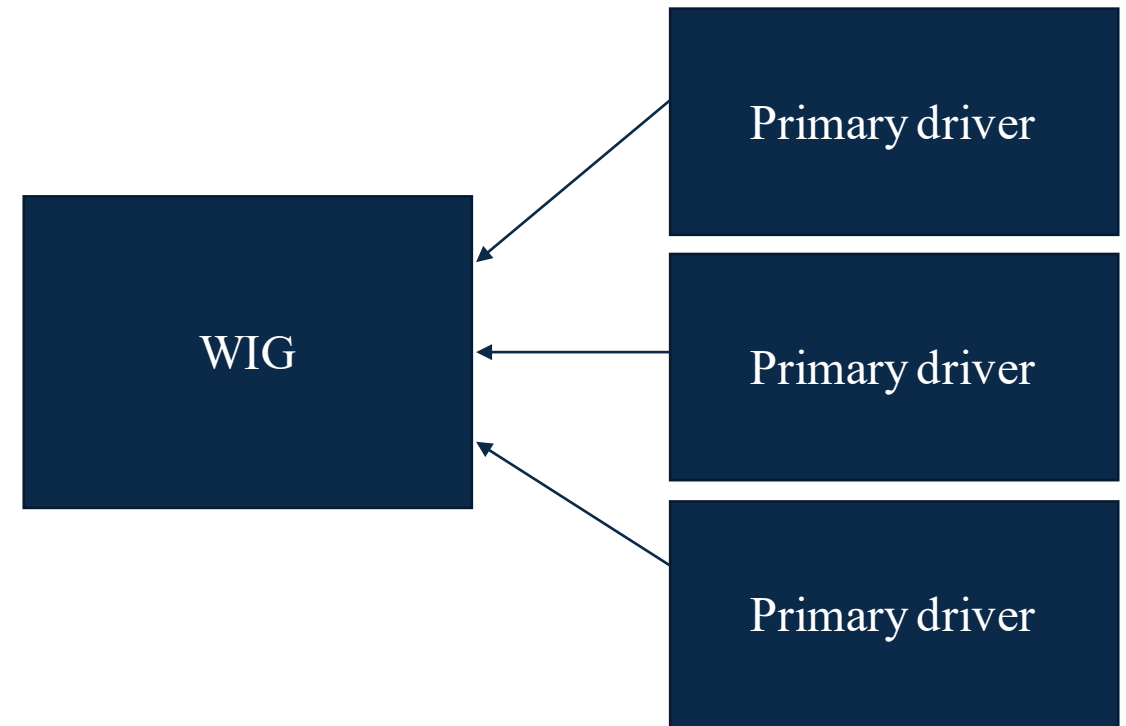
- Identify barriers or root causes that could be removed or minimized to increase numbers
- Use data to understand what the team *could* achieve under the best possible scenario



Assess feasibility of reducing attrition

/ What levers or primary drivers impact your WIG?

- Example: **Reduce attrition**
(Increase number of clients reaching completion benchmark)
 - Accessible workshop times and locations
 - Sense of group cohesion
 - High-quality facilitation
 - Relevant curricula





Scenario 1: Enrollment does not change

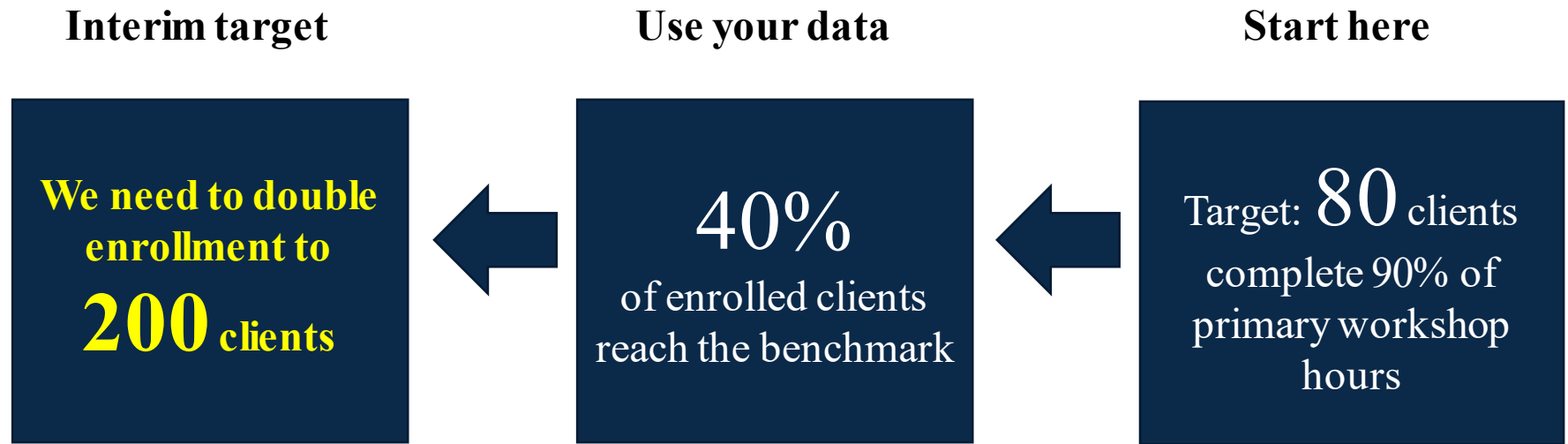
- / **Current enrollment: 100 clients per year**
- / **40% of clients currently reach the workshop completion benchmark**
- / **Assuming enrollment does not change, what portion of clients need to reach the completion benchmark to hit our target?**
 - Is it feasible to double the portion of clients reaching the benchmark from 40% of clients to 80%?





Scenario 2: Attrition does not change

- / **Current enrollment: 100 clients per year**
- / **40% of clients currently reach the workshop completion benchmark**
- / **Assuming the rate of attrition won't change, how many clients do we need to enroll to hit our target?**
 - Is it feasible to double enrollment to 200 clients?



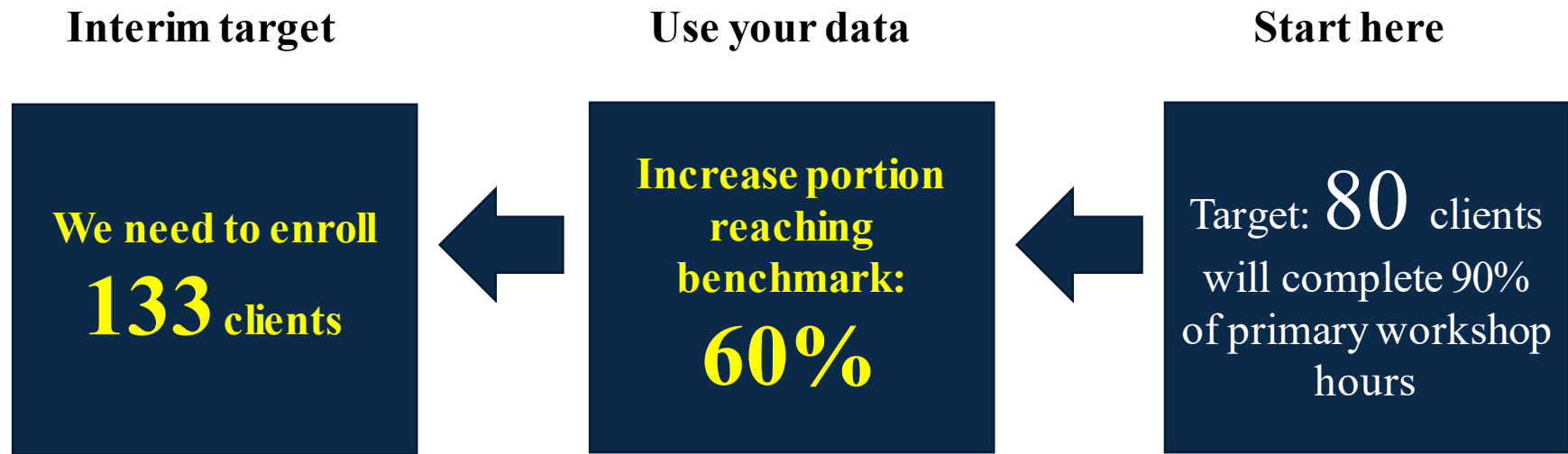


Scenario 3: Increase enrollment and retention

/ **Current enrollment: 100 clients per year**

/ **What if the program increases the enrollment rate and the portion of clients reaching the benchmark?**

- Is it feasible to increase enrollment by one third? (from 100 to 133)
- Is it feasible to increase the portion of clients who reach the benchmark by 50% (from 40% to 60%)





Share with us

- / You are the program director for this program. Which scenario do you feel is most feasible?**
- / What factors would you consider?**





Share with us

Both, because the FEDS are watching!

aspects. Partner sites.
Environmental factors of meetings, including time

Based on the data, I would focus first on enrolling more participants and then next focus on the attrition rate

Both. I think it would be easier to do smaller increments on each one. Maybe focusing on outreach with the outreach coordinator and retention with case managers and facilitators

I see the third scenario as the most feasible, because both are realistically attainable and not so drastic as scenarios 1 and 2

Maybe look more into attrition but still recruit sites for enrollees



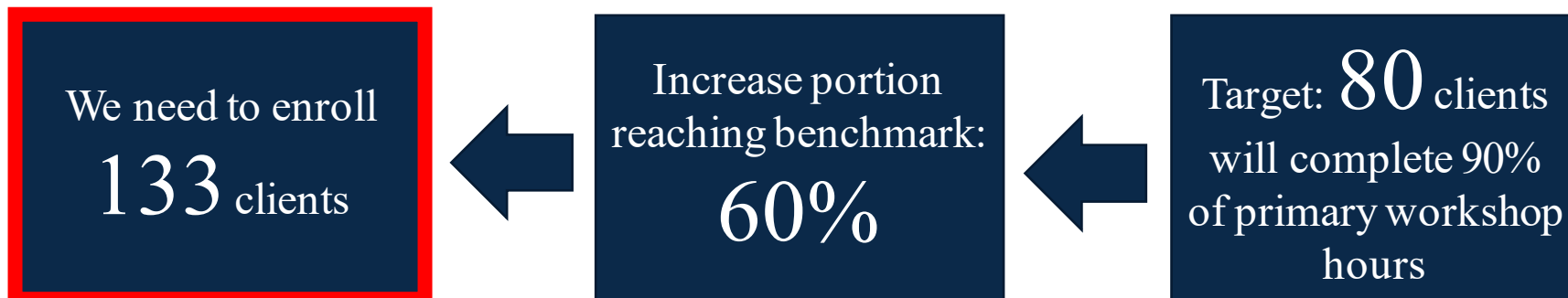
Narrow in on a WIG

/ The team decides to move forward on more incremental improvement related to enrollment and retention

- But, focusing on one goal is a best practice to keep the team focused and committed

/ Consider

- Impact: What will help the team make greater progress toward the challenge?
- Feasibility: What can the team achieve? Where can the team get a quick win?
- Motivation: What does the team want to address first?

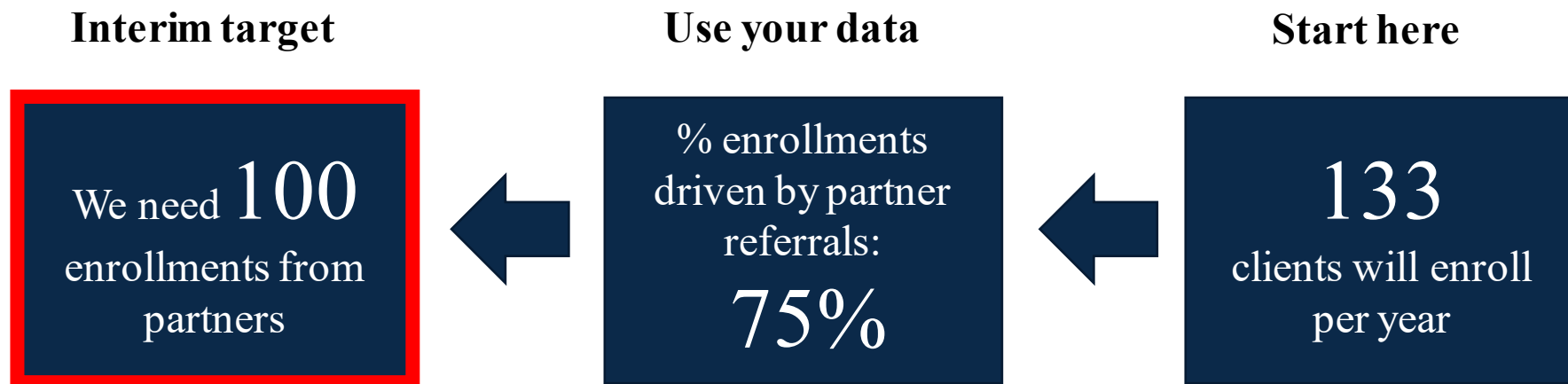




Example: Partner referrals

/ How many referrals do we need from partners to support our goal of 133 enrollments?

- Start with your new goal: Enroll 133 clients per year
- Gather data related to your primary drivers:
 - 75% of our enrollments come from partners
 - We need 100 enrollments from partners per year at the current rate of partner referrals





Dig deeper into partner referrals

/ How many partner referrals translate into enrollments?

- Over the past year, 40% of partner referrals translated into enrollments
- With this rate of conversion from referrals to enrollments, we need 250 referrals from partners
- $100 \text{ enrollments} * 0.40 \text{ conversion rate} = 250 \text{ partner referrals}$





Partner referrals (cont.)

/ Our interim goal: Increase referrals from partners to 250 per year

/ Can we meet this target with current partners?

- Assess your baseline
 - Currently, we get 15 referrals/month from partners, or 180 per year
- Determine the gap
 - We need 70 more referrals per year to meet our goal
- Determine the potential
 - How many referrals could you get from existing partners? Based on current partner censuses and eligibility criteria, how many could they send to you?
 - What are the barriers to receiving more referrals from current partners?



Example: Identifying partner-level referral targets



Using data to identify partner contributions and expectations

/ **Consider by partner:**

- Referral history
- Capacity to refer
- Conversion of referrals to enrollments

/ **What is a reasonable number of referrals to expect from each partner?**

/ **Can we enroll more referred clients?**

/ **Do we need additional partners?**



Using data to identify partner contributions and expectations

/ Example

Target: 80 clients complete 90% of primary workshop hours

GY 3: 15 clients complete 90% of primary workshop hours

Grant Year 3	Partner A	Partner B	Totals
# of potentially eligible clients	100	50	150
# referred	60	20	80
% referred	60%	40%	53%
# enrolled	30	15	45
Enrollment rate (%)	50%	75%	56%
# of enrolled clients reaching completion benchmark (rate)			15 (33%)





When might you need to consider additional partners?

- / **What do you project will be the number of clients that meet the 90% primary workshop completion benchmark if you maximize each partner's referral rate?**
 - Consider the number that would achieve the 90% completion benchmark if you **maximized referrals from current partners** and your enrollment and completion rates don't change. Is it enough? Is that reasonable? What is reasonable?
- / **Do the same exercise for enrollment rate**
- / **Consider reasonable increases in referral and enrollment rates**
- / **How much can you improve primary workshop completion rates?**
- / **What is the gap?**



What is the potential to improve?

Scenarios	Partner A	Partner B	GY3 Totals
<i>1. Maximize potential referrals</i>	100	50	150
Current enrollment rate	50%	75%	56%
Potential completers at current rate (33% of enrollees)	16	12	28 instead of 15
<i>2. Maximize potential enrollment from current referrals</i>	60	20	80
Projected completers at current rate (33%)	20	7	27 instead of 15
<i>Neither scenario on its own is enough: if all potential referrals enroll, 53% need to reach completion benchmark</i>	53	27	80
Current completion #s	10	5	15



Share with us

/ How do you develop targets for your improvement goals? What factors do you consider?





Share with us

Utilizing nFORM data but more so our internal data we collect

SMART goals!

Develop targets based on realistic expectations and consider if we can get buy in from everyone. If we don't have everyone's buy in it's hard to reach goals. We consider everyone's ideas

Among other things, we consider the target, manpower, what events we have coming up and when, what referral sources were fruitful

We review the data during our internal CQI team weekly meetings and review the progression of those focuses we have implemented and modify as needed



We will continue this discussion next month!

/ **October office hours will cover using activity tracking to inform CQI**

- Considerations for adjusting internal improvement targets
- Determining what activities to track related to your WIG
- Developing a tracker to monitor those activities



Announcements





Announcements

/ Learn more about using nFORM to monitor survey administration

- October 10, 2023, 2-3 p.m. ET

/ Join us for the October CQI office hours

- October 24, 2023, 2-3 p.m. ET
- Invitation is coming soon!

/ For more resources:

- The HMRF Grantee Resources site (<https://hmrfggrantresources.info/continuous-quality-improvement>) contains CQI template, worksheet, office hours slides, tip sheets, and other CQI resources
 - For more on SMART goals, see [Guiding CQI with SMART goals](#)
 - For more on dashboards and WIG sessions, see [Using 4DX to Support Improvement Efforts](#)

/ For CQI-related questions, reach out to the CQI helpdesk

- hmrfcqi@mathematica-mpr.com



Thank you!

