Mathematica
Progress Together

# Tracking activities to inform your path to improvement

## Continuous quality improvement (CQI) office hours

**October 24, 2023 | 2:00 – 3:00pm ET**

HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

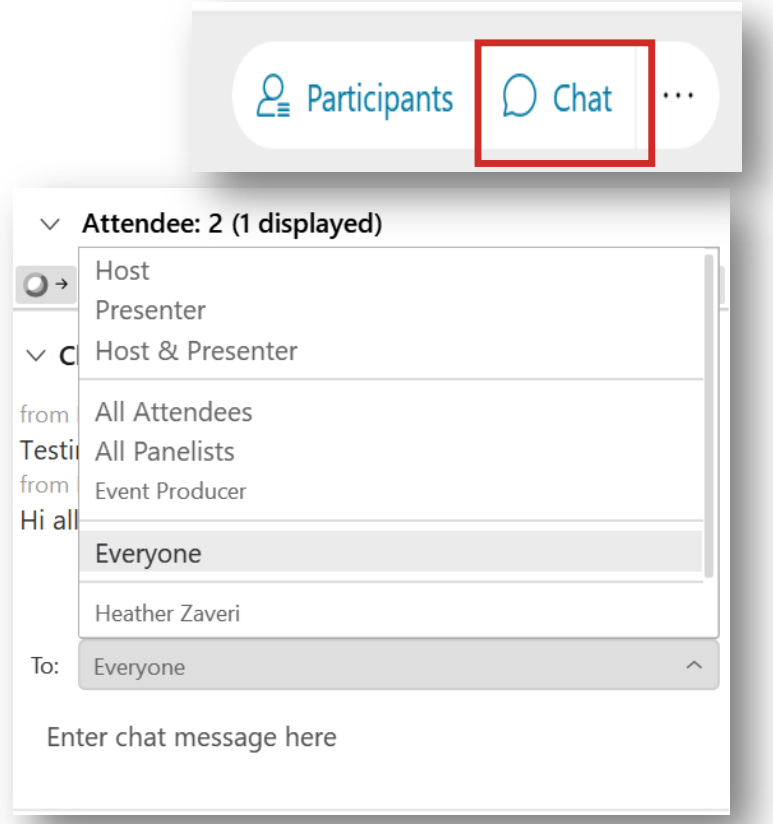
OPRE

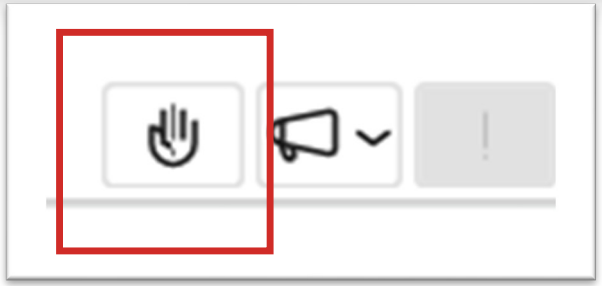
OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families

BUILD
Building Usage, Improvement, & Learning with Data in HMRF Programs

# 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

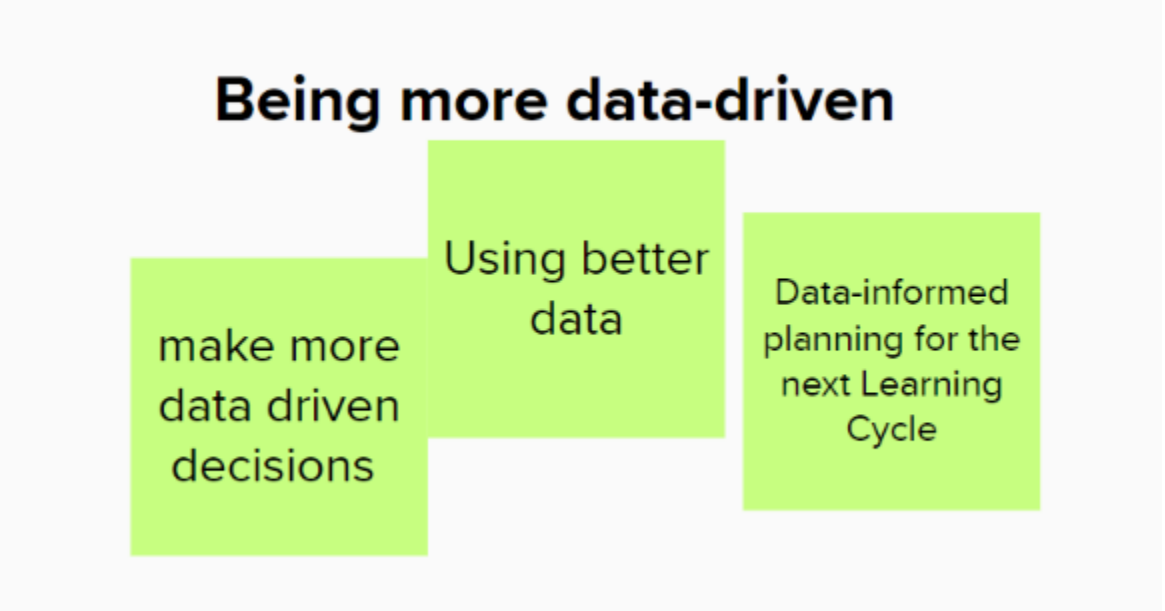


# Focusing on your CQI challenges

**A common CQI challenge:**

**Using data more effectively to guide improvement**



# Today’s agenda

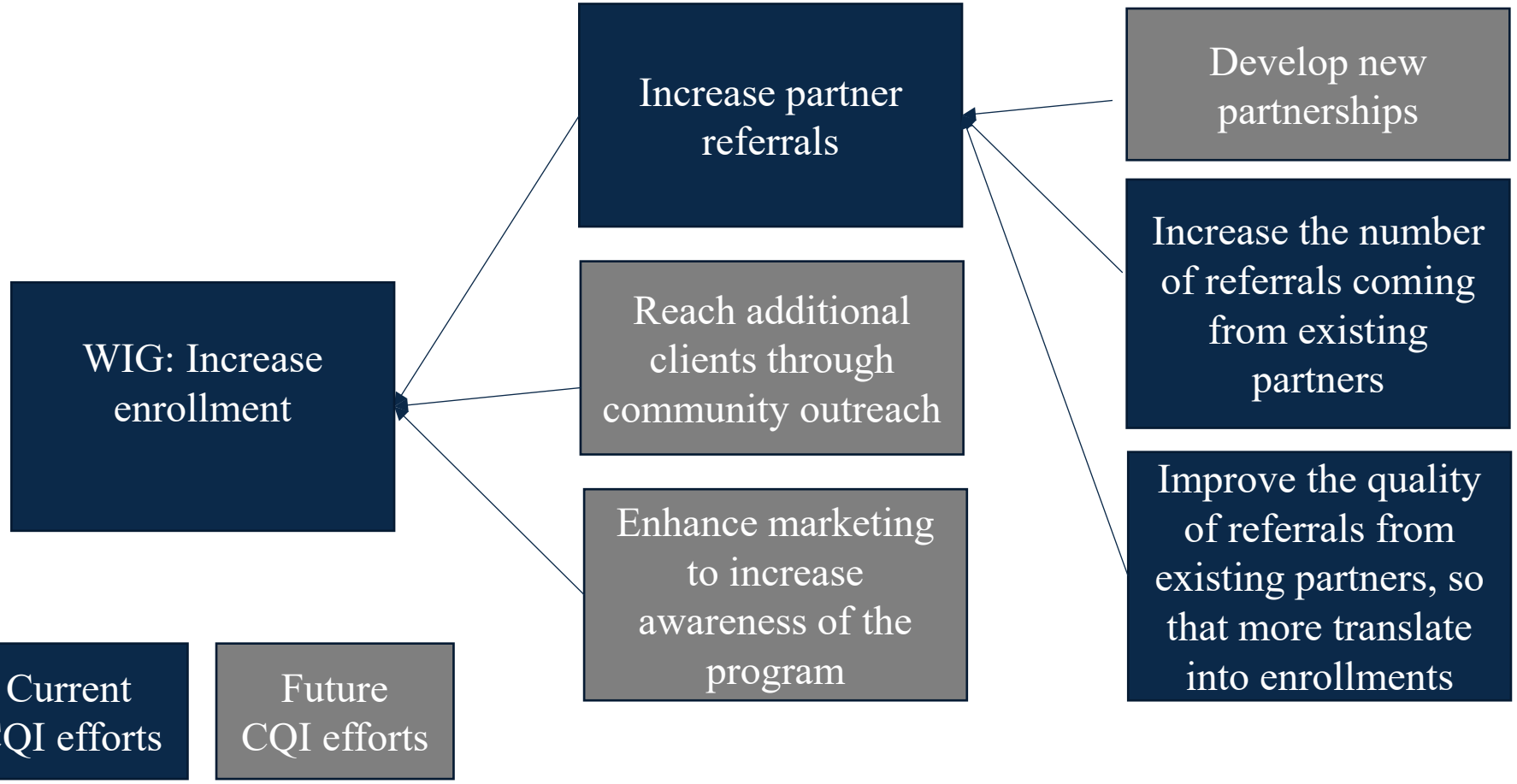
- Review of last office hours: Developing data-informed goals
- Tracking strategy implementation to monitor progress toward goals
- Grantee spotlight: Chautauqua Opportunities
- Creating a tracker
- Reviewing your progress

# Review:
# Developing data-informed goals

# Data-informed goals help teams focus on what needs improvement and path forward

- **Your team's wildly important goal (WIG) is your most important priority to address through CQI**
  - WIGs can be based on ACF benchmarks for enrollment and workshop participation, or other aspects of programming
  - Example: Increase the number of clients enrolled
- **Interim goals are the levers that the program will influence to reach the WIG**
  - Example: Increase partner referrals
- **Sometimes interim goals can be broken down**
  - Example: Increase referrals from existing partner organizations; develop new partnerships to expand capacity

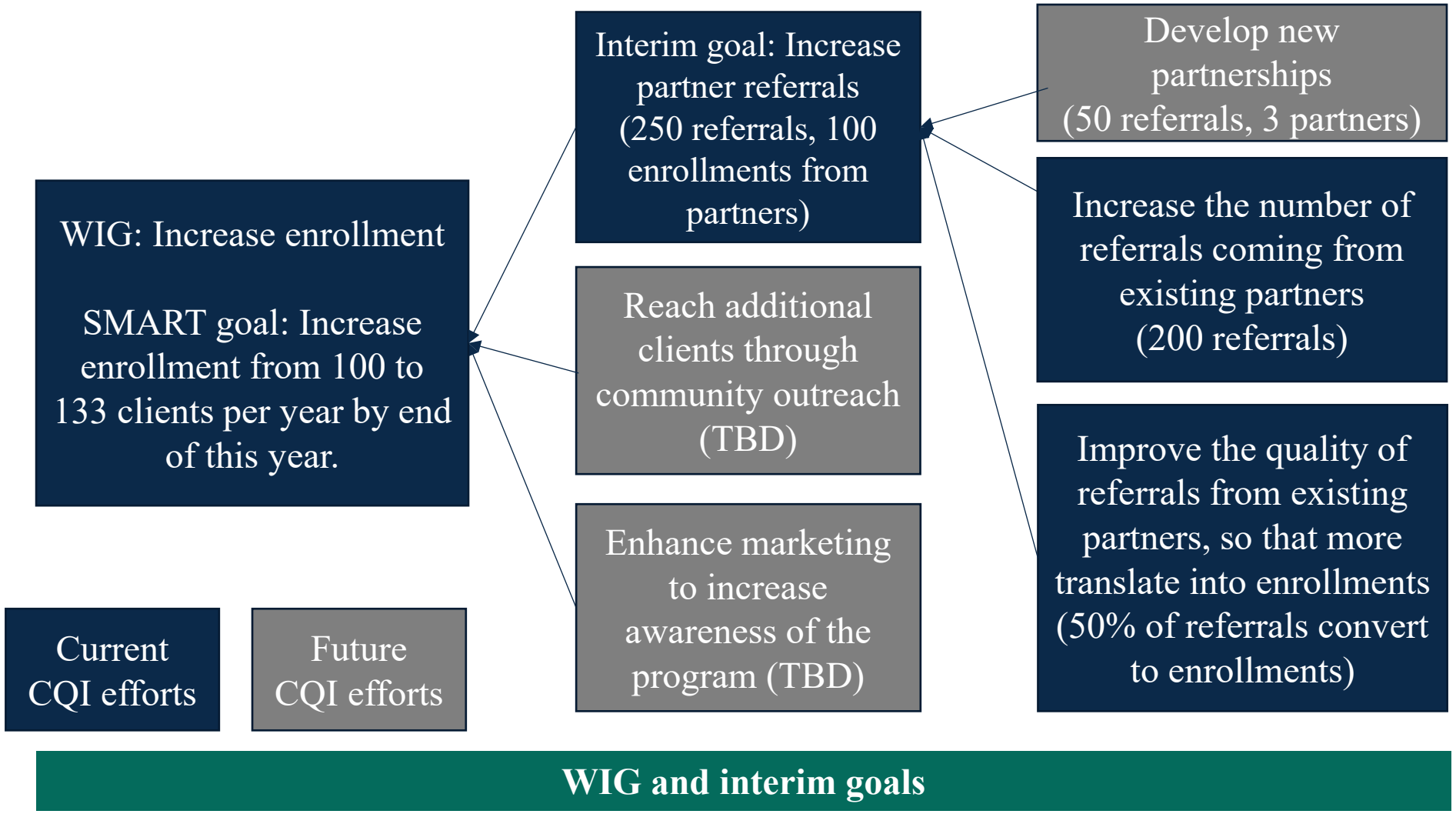
# Build a theory of improvement to document how the team will improve



# Adding targets to your goals

- **CQI involves gauging the feasibility of a strategy by defining success at the start and measuring progress towards it**
- **To be useful for CQI, goals must be SMART and include specific targets that define success**
  - SMART WIG: Increase the number of clients enrolled by 20% by the end of next quarter
  - SMART interim goal: Receive 250 referrals from existing and new partners to increase enrollments from 100 to 133
- **September 2023 CQI office hours covered how to identify data-informed goals and create targets for success**

# Theory of improvement: Adding targets



# Create checkpoints for your WIG

## / Long-term targets are more useful with checkpoints

- Don’t wait until the end of the year to assess success
- Use checkpoints (e.g., quarterly or monthly interim goals) to ensure the team stays on track throughout the year

## / Checkpoints can vary throughout the year; they should account for seasonal variation

- We want 100 enrollments generated from partners each year, but we don’t receive referrals consistently throughout the year
- Example: Rather than 25 referrals per quarter, we may strive for 35 in more productive quarters (April-June) and 15 in less productive quarters (October-December)

# Revising and updating targets

## / Targets aren't static; you may revise for many reasons

- You recognize from monitoring that you set them too high or too low
- You miss an interim target and need to make up for the shortfall

## / Example: Receive 250 referrals from partners each year

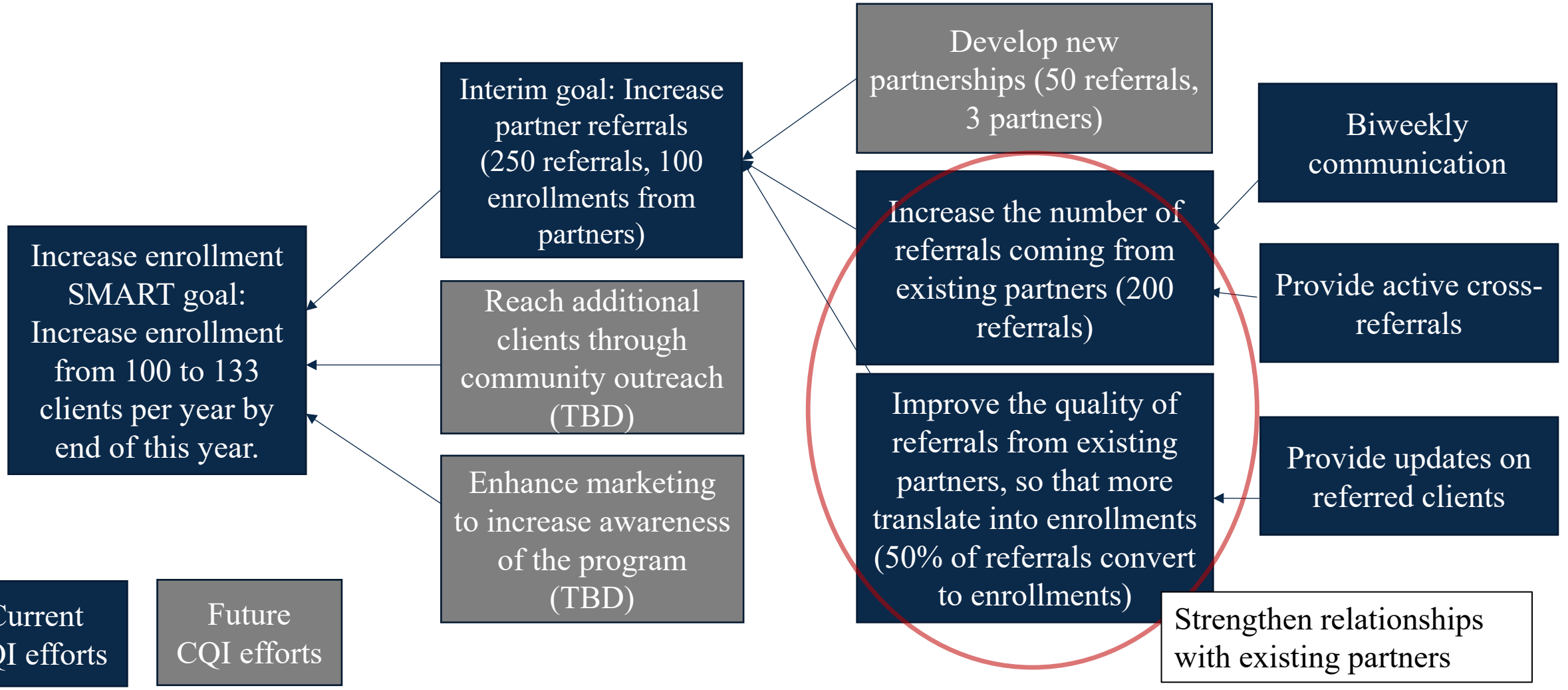
- To ensure your team stays on track, you may set monthly goals of 21 referrals
- If the team only receives 10 referrals per month from January through March, targets in subsequent quarters will need to be updated
  - We now need 25 referrals per month from April through December

# Tracking strategy implementation to monitor progress towards goals

# Identifying the specific activities tied to your strategy

- **WIG: Increase enrollment from 100 to 133 clients per year**
- **Interim goal: Receive 250 referrals from partners each year**
- **How? By testing strategies to strengthen partner relationships**
- **What does good partner maintenance look like?**
  - What did root cause analysis reveal?
  - What is known from research or practice knowledge? What actions support good partner maintenance?
  - What can your team influence?
- **What activities will support stronger relationships with partners?**
  - Example: Regular communication with partners (via email or phone) biweekly
  - Example: Follow-up after referrals with updates about client participation or reasons that clients were not eligible
- **See Strategy Development Tip Sheet on how to develop effective program improvement strategies**

# Build out your theory of improvement



# Refresher: Lead and lag measures

- **Lead measures are activities or processes that are predictive of future results**
  - Useful for tracking implementation of strategies
  - Provide the team with early indicators of success or challenges
  - Ensure accountability to implement the program well
- **Lag measures are the results**
  - Used to assess progress toward interim goals and WIGs
- **You do not need a perfected theory of improvement to start tracking lead measures**
  - Begin tracking when you have a tentative idea of the strategies that will support improvement and refine your tracking system as you learn more

# Select lead measures to monitor implementation of your strategies

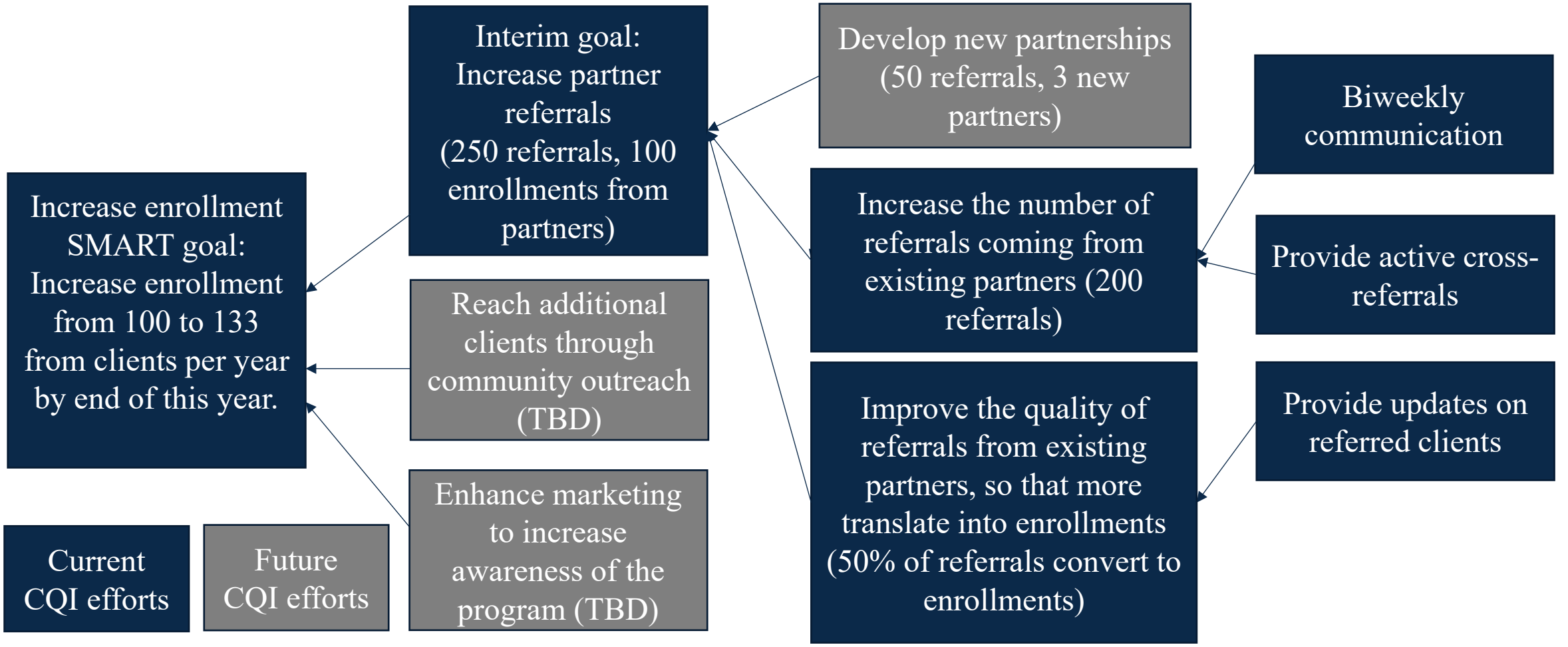
## / What indicators allow you to track whether strategies are implemented consistently?

- Consider what is measurable and feasible to track
- Ensure the measures are actionable and timely

## / Example: Strengthen partner relationships

- Biweekly communication → Have staff keep a communication log
- Active cross-referrals → Track the number of referrals sent by and to partner agencies each month using nFORM
- Provide updates on referred clients → Have staff note in the communication log, for each client referred by a partner, was at least one update provided to the referring client?

# Build out your theory of improvement




**Lag measures** **Lead measures**

# Grantee spotlight: Chautauqua Opportunities

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- Data monitoring for marketing and recruitment
- Chris Nicosia, project director
- Dan Siracuse, outreach and marketing specialist
- Dori Giles, project manager
- Fatherhood FIRE grantee

# Questions

- **What questions do you have for Chautauqua Opportunities?**

# Creating a tracker

# Create a tracker to monitor strategy implementation

- **For your team's initial theory of improvement, flag the data source for each activity that supports implementation of a strategy**
  - Data sources can be nFORM, internal data systems, or new data collection
  - Check out February 2023 CQI Office Hours on using your logic model to guide your CQI efforts and June 2023 Office Hours on supporting a data-driven culture throughout your program
- **Identify relevant nFORM reports that you can use for tracking**
  - Check out the August 2023 nFORM Office Hours on using nFORM data tools to identify and track progress towards targets
- **Identify other relevant reports that your organization maintains**
- **Create a supplemental tracker to record and monitor activities that are not recorded in existing reports**
- **It may be feasible to combine reports and trackers into a comprehensive tracking tool or dashboard to more easily share**

# Example: Tracking biweekly communication

## / What must be tracked to monitor staff implementation of the strategy?

- Activity: Biweekly communication with each partner
- "Biweekly" means we need a date field
- "Each partner" means we need a field to note the partner organization

## / What must be tracked to monitor partner response?

- Success of communication efforts (did the partner respond to the outreach?)

## / What would be helpful to track to inform refinements to the strategy?

- Type of communication outreach (e.g., phone, email)
- Notes about the nature of the outreach effort

# Example tracker: Partner relationships

| A | B | C | D | E | F |
|---|---|---|---|---|---|
| **Partner Communication Log** | | | | | |
| *Please enter communication via in-person meetings, phone calls, emails, and social media at the start of each new month!* | | | | | |
| **Date of communication** | **Partner organization name** | **Contact name** | **Type of communication** | **Successful contact?** | **Notes** |
| 5/25/2023 | McLean County Health Dept. | Troy Masters | Phone call | Yes | Checked in about a client Troy referred |
| 6/1/2023 | Unit 5 School District | Trish Johnson, secretary | Email | Yes, received email back | Forwarded an invite to an upcoming community forum of interest |
| 6/3/2023 | Center for Youth & Family Solutions | Simon Bartlett | Phone call | No, left voicemail | Called to schedule meeting to plan upcoming event |
| 6/5/2023 | Center for Youth & Family Solutions | Simon Bartlett | Email | No response | Followed up with email about planning |
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| | | | | | |

# Tips for creating an activity tracker

- **Determine and be clear about tracking roles, responsibilities, and frequency of updating**
  - Staff reminders about data entry can support timeliness and quality
- **Where automated data exists, draw on it to reduce staff burden**
- **Assign responsibility to your data manager or another staff to perform data quality checks**
  - Quality checks can prompt troubleshooting to support timeliness and accuracy

# Reviewing your progress

# Bringing it all together in a dashboard

## / A dashboard is useful for presenting, in one place, progress on goals and related strategies and activities

- Our December 2022 CQI office hours focused on 4DX dashboards

## / Tips for building a dashboard

- Make sure the dashboard includes lag measures to demonstrate progress on WIGs and interim goals and lead measures to inform actions and next steps
- Lead and lag measures are likely to be updated at different intervals; determine the frequency that makes sense to show meaningful changes over time
- Limit the dashboard to only the essential lead and lag measures to inform your understanding of efforts and progress

# Be inclusive when reviewing progress

## Set up regular meetings with structured agendas to review your dashboard with staff

- Allows the team to draw on multiple perspectives to make meaning of the data and determine next steps
- Keep meetings brief (~20 minutes) and focused on the challenge
- Make meetings action-oriented by committing to next steps
- See the January 2023 CQI office hours for information on using WIG sessions to review progress on goals and establish a cadence of accountability

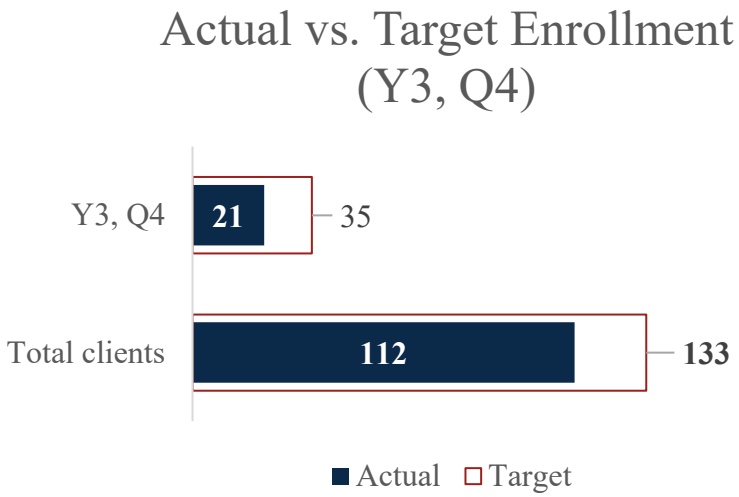
## Make the data accessible by aggregating data and presenting in visually appealing charts

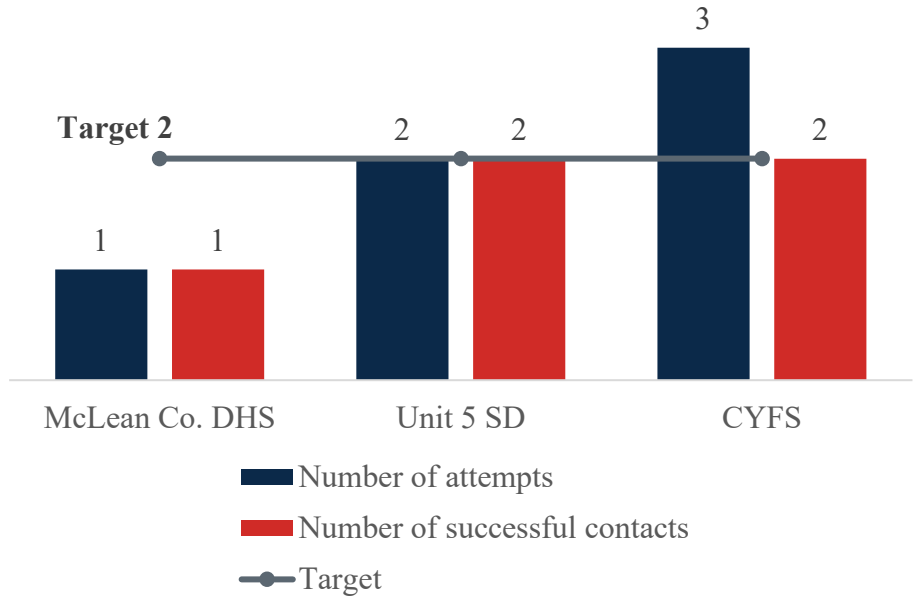
- Use your theory of improvement to determine the most important data points to include on your dashboard

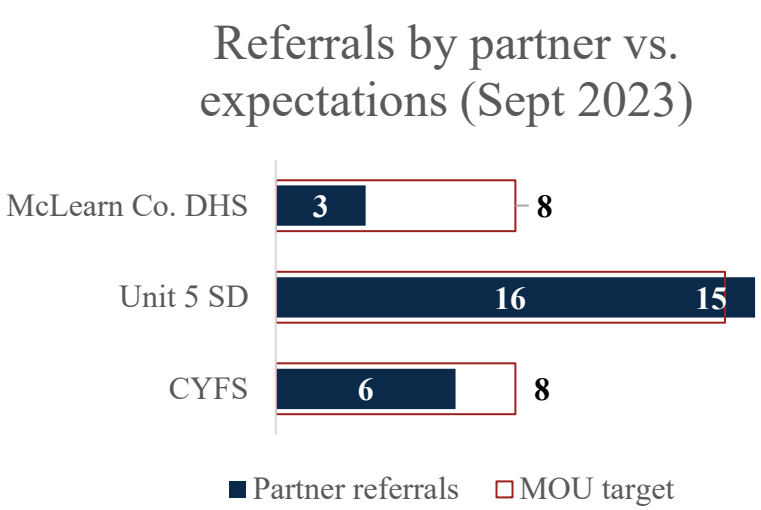
# Example dashboard:

# Enrollment and partner relationships

**Updated 10/13, reviewed 10/16**



# Menti: Share with us

- **How do you track progress towards goals and share results with your team?**
- **Do you share progress on a dashboard?**

# Menti: Share with us

Use nFORM Operational Reports to track progress, share the Grant Year Overview in the Query Tool as a dashboard

biweekly we send out a spreadsheet to staff showing the number of enrollments, one session, 50%, 90% and 100% completers

progress table on weekly team meeting agendas

We use a Salesforce data management system; it creates dashboards for us

Google Doc

yes - we use a google sheets with each row representing the proceeding 7 days at that point in time. we discuss this during our weekly lab meeting

We have an enrollment tracker that is updated weekly. Those enrollment numbers are shared at bi-weekly check-ins.

We use Monday to identify/assess goals for every recruitment, registration, and enrollment cycle. A cycle is 5 weeks.

Biweekly meetings with staff, end of semester/year report with program partners

Present at department meeting, streams, google docs

# Menti: Share with us

- **In what ways would you like to improve your CQI processes in Grant Year 4?**

# Menti: Share with us

Retention

Enrollment

Maybe include client feedback- start a consumer advisory board. Incorporate those feedbacks in our CQI processes

better track using our new template to monitor the deliverables and services of career coach

better tracking of the impact of our outreach efforts

Create a robust Referral Tool

shift to more proactive versus reactive improvement strategies and outcomes

keeping better track of referrals

We are focusing on refreshing our workshops and content and training facilitators now that we are once again fully live

Get more referrals from project participants

# Announcements

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## / Join us for the next CQI office hours

- *NOTE change!* Tuesday, December 5, 2023, 2-3 p.m. ET
- Invitation is coming soon!

## / For more resources:

- The HMRF Grantee Resources site (https://hmrfgrantresources.info/continuous-quality-improvement) contains CQI template, worksheet, office hours slides, tip sheets, and other CQI resources
  - 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!