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**
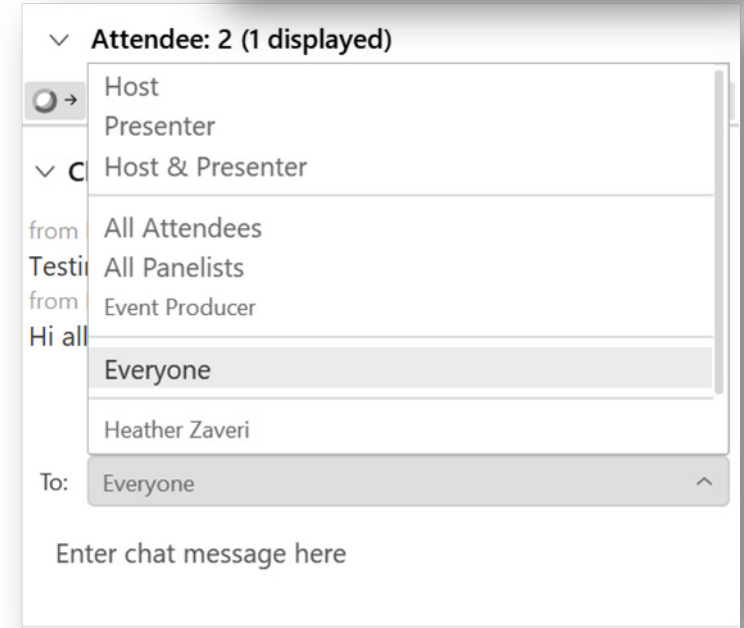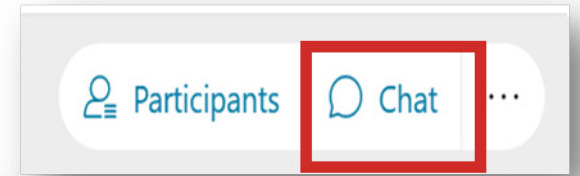
Today's agenda

/ **New URLs for nFORM 2.0**

/ **Recapping where we are**

/ **Planning for road test barriers and facilitators**

/ **Practice using COM-B to support a successful road test**

New URLs for nFORM 2.0

/ **To meet new requirements for federal systems, nFORM 2.0 URL addresses have changed**

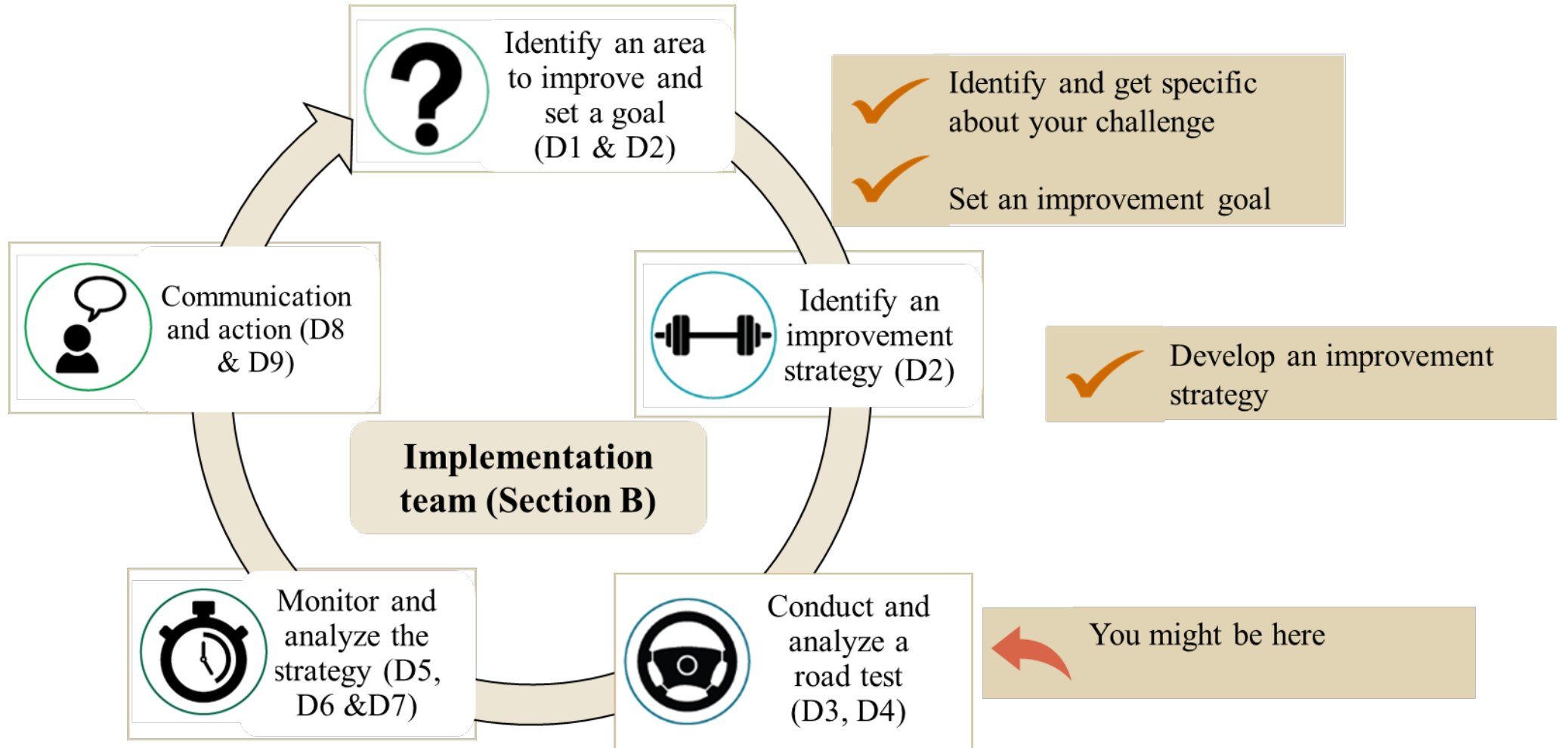| nFORM 2.0 component	Old URL	New URL as of 2/20/2022
Log-in page	hmrf-nform.com/nFORM	hmrf-nform.acf.hhs.gov/nFORM
Survey	hmrf-nform.com/Survey	hmrf-nform.acf.hhs.gov/Survey
Help page	hmrf-nform.com/nFORM/Contact	hmrf-nform.acf.hhs.gov/nFORM/Contact

Recapping where we are

Recapping where we are

You're ready to road test when you have

Learned about the challenge by identifying root causes and prioritized one or a few related causes

Developed a strategy that addresses the root cause

Have learning questions and an implementation plan for your test that will allow you to assess implementation and progress toward addressing the root cause

Learning about the challenge: a review of root causes

/ **Root cause analysis: The process of breaking down challenges into discrete causes**

/ **Ensure that you're addressing the cause of a problem, rather than a symptom of it or what you see on the surface**

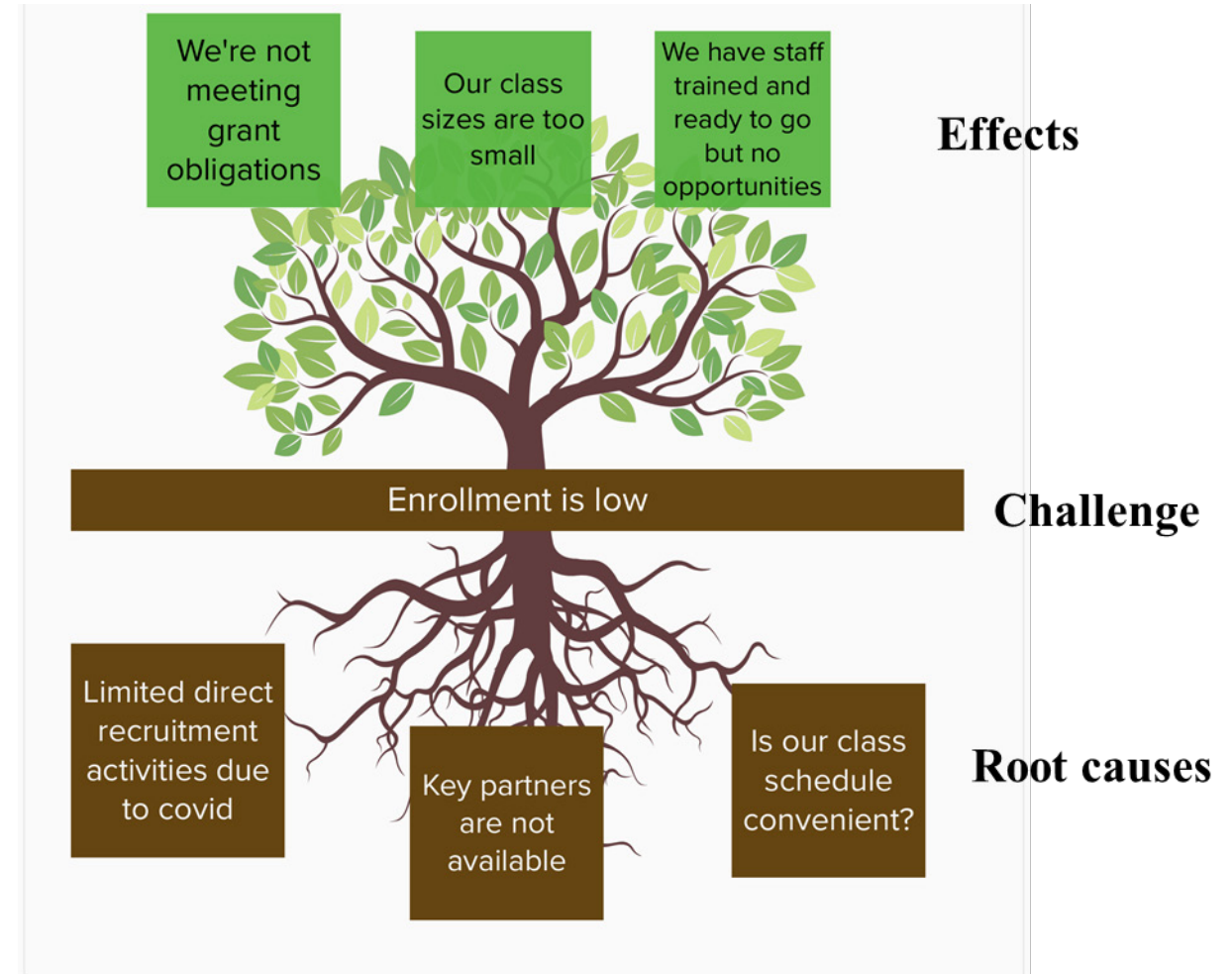/ **Identifying discrete causes allows your team to develop targeted improvement strategies**
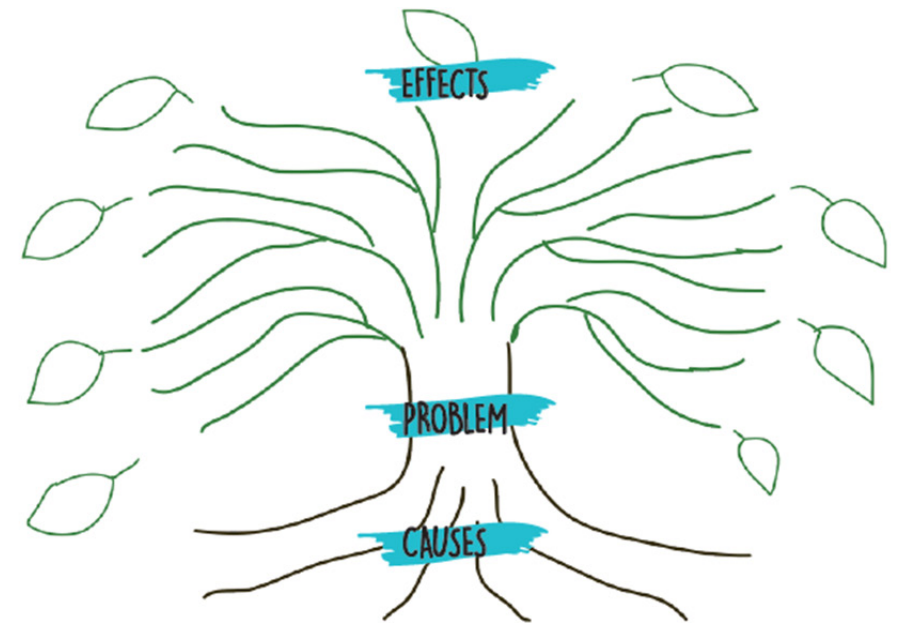
A method for identifying root causes with your team

/ **Activity: Problem tree analysis**

/ **Goal: Break down a high-level challenge into its causes and identify the effects of the challenge**

/ **Next steps: Prioritize root causes to determine a focus area for improvement work**

Developing a strategy to address a root cause

/ **Your strategy should**

- Be well articulated

- Have a clear rationale for how it will influence the root cause

Strategy rationale example

/ **Challenge: Enrollment is low**

/ **Root cause: Recruitment has been hampered by COVID-19, limiting our reach**

/ **Strategy: Build a social media presence to expand reach**

Strategy		*Influence on root cause (early outcomes)*		*Outcome*
Develop a program Instagram account; post about upcoming classes and relationships tips; encourage program alumni to share within their networks	→	Increase the reach of our messages; build relationships with prospective clients in a virtual space	→	Increased enrollment
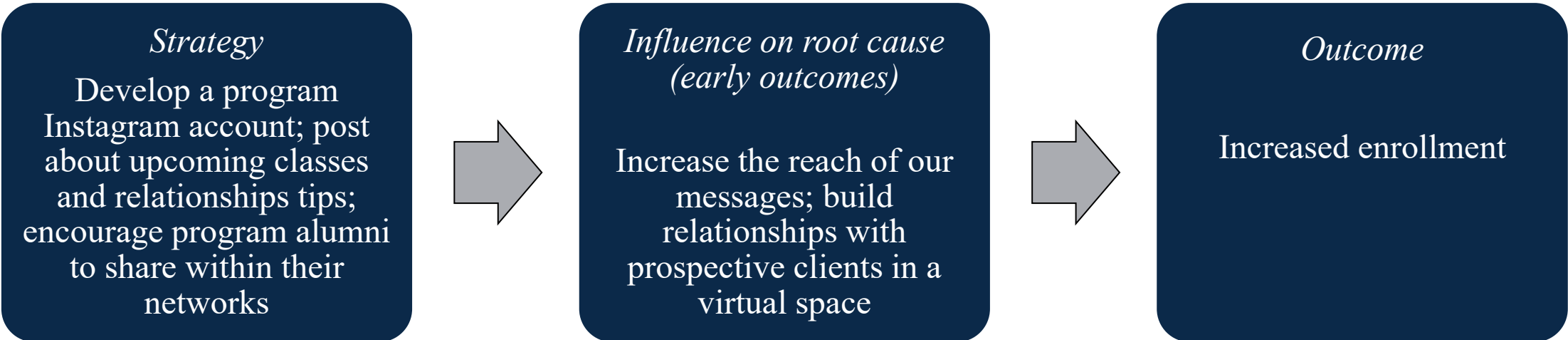
Learning questions and implementation plan to assess progress

/ **A strong road test plan consists of learning questions and an implementation plan that specifies logistics of the test and a plan for data collection**

/ **Data collection should aim to understand implementation and early progress toward addressing the root cause (short-term outcomes)**

Planning for road test barriers and facilitators

Planning for road test barriers and facilitators

/ **A common reason for needing to retest a strategy is to improve implementation; if the strategy is not implemented properly, your team can't assess promise**

/ **When implementing a change effort, it can help to anticipate barriers (and facilitators) to making the change**

/ **Examples of barriers to change**

- Staff mindsets: "We've always done it this way"

- Lack of understanding about how to implement the change

- Environmental factors (e.g., bad timing; the program is experiencing a lot of turnover and leadership is focused on hiring)

Planning for road test barriers and facilitators (cont.)

/ **Examples of facilitators of change**

- Leadership support for change

- A common understanding among staff for why change is needed

- Time and support for learning and training

- Staff involvement in planning and implementing change efforts

/ **To enhance the chances of success, plan for how you will address barriers and build on facilitators**

Share with us

/ **What are some of the barriers or facilitators you have experienced when implementing a programmatic change?**

Share with us

What are some of the barriers and/or facilitators you have experienced when implementing a programmatic change?

Mentimeter

lack of commitment
inconsistent message
staff turnover   implementation fidelity
client attendance   full team buy-in   limited outreach
reluctant staff   additional work for staff   attending
participants fail to atte   staff buy-in   flexibility   don't touch what works   lack of understanding
covid 19   no capacity   streamlining   staffing   client not showing up
lack of buy-in from some   time   planning time
everyone stretched thin   staff buy in   client equity
complicated   leadership support   tracking   facilitator-felxibility
getting attendance   time management for cms   got busy with workshops
increase in meeting times   bad timing
lack of buy in from staff   resistance to change
participant not on camera   openness of staff
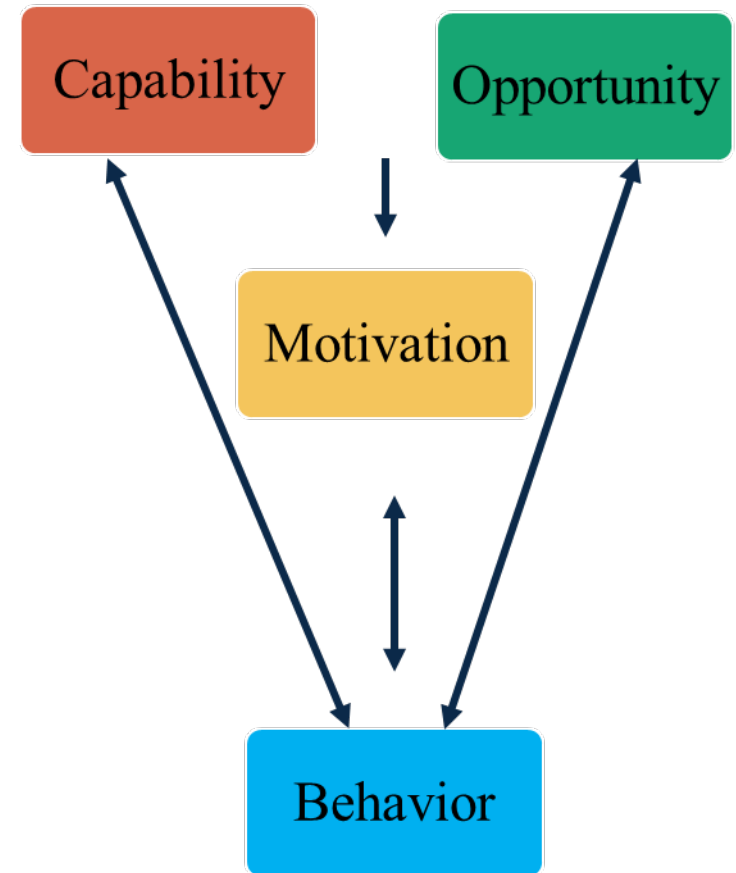partners not available
parent consent forms back

COM-B: How to facilitate the behavioral changes you hope to see

/ **Behavior change is influenced by three domains**

- Capability: Do users have the ability to make change?

- Opportunity: Is the environment supporting them to make change?

- Motivation: Do people want to make changes?

Example of COM-B

/ **Improvement strategy: Staff will complete a workshop planning template prior to each session to promote intentional planning and improve facilitation**

Capability

Will staff understand how to complete the template?

Opportunity

Will staff have time to complete the template during the workday?

Motivation

Will staff see value in completing the template? Will they feel they will be rewarded or punished for completing the task or not? Will they sense that peers value the planning effort?

Example of COM-B

/ **Implementation plans should address barriers and build on facilitators; and vary based on the type of barrier/facilitator**

Capability

Lack of understanding of how to complete (barrier) => Additional training or a guide to support completion

Opportunity

Lack of time to complete (barrier) => Shift away other duties and reserve the last 30 minutes of the day for session planning

Motivation

Don't see the point of completing the template (barrier) => Identify a champion who is willing to try it first and speak to how it helped OR
Staff see the value of improving (facilitator) =>: Share data with staff to demonstrate how/whether the template is supporting better facilitation

Supporting implementation

/ **Anticipating and planning for barriers and facilitators helps to support strong implementation of your road test**

/ **If unexpected barriers arise during your road test, develop plans to address them before you re-test**

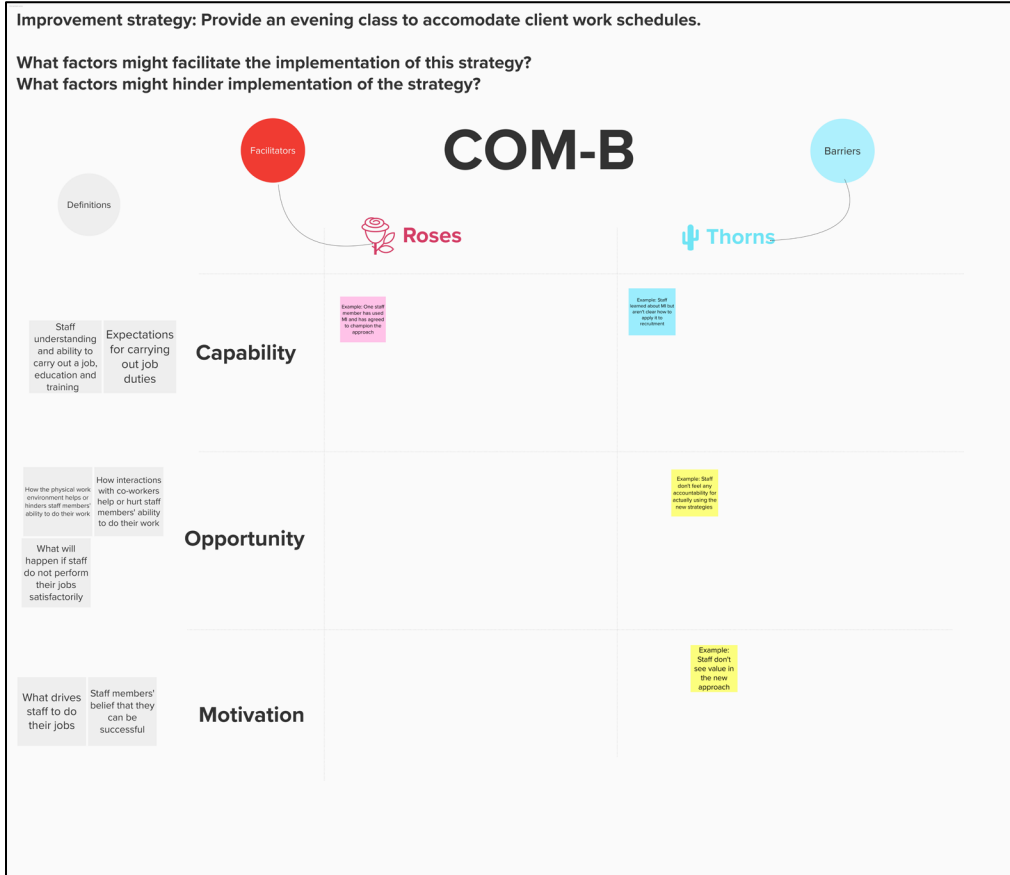/ **Similarly, decide how to leverage unexpected facilitators before you re-test**

Breakout rooms: Using COM-B

Try it out: Using COM-B to anticipate implementation facilitators and barriers

/ **Improvement strategy: We will provide an evening class to accommodate client work schedules**

/ **To practice using with staff, navigate to Mural; you may also watch the activity**

COM-B reflection

/ **Were any categories – capabilities, opportunities, or motivations – harder for you to identify?**

/ **Did you see any stickies that jumped out to you? Potentially a barrier or facilitator you hadn't considered?**

/ **Any early thoughts on how you might address any identified barriers?**

Thinking time

/ **Consider your own improvement strategy. Jot down a few potential barriers and facilitators that might hinder or support implementation.**

Additional questions?

/ **For more resources:**

- HMRF Grant Resources (https://hmrfgrantresources.info/continuous-quality-improvement) contains CQI template, tip sheets and other CQI resources

- For a refresher on planning and conducting a road test and monitoring change, see the November 2021 office hours slides.

- For tips related to strategy development, see the strategy brief on HMRF Grant Resources

/ **Next office hours on March 22, 2022, from 2-3pm ET**

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

Breakout room materials

Roses

Thorns

Capability

Roses:
- Offering more in-person sessions
- Offering meals
- Ability to meet participants at the community level - offers level of comfort/trust
- offers more opportunity to potential clients

Thorns:
- staff not available to work nites
- child care
- Lack of access to transportation and childcare
- EXAMPLE: Evening classes will need to be single facilitator, rather than co-facilitated, which not all staff feel equipped to do

Opportunity

Roses:
- Ability to provide alternatives to participants (reach wider audience)
- In-person sessions allow for stronger networking and rapport between clients
- reports that can help case managers better manage
- COVID-19 has allowed clients to become more accustomed to virtual sessions in many aspects of their lives (e.g., school meetings, doctor appointments)
- virtual works well in evening
- evening hours offer more flexible schedules for staff
- Example: The program has access to the community center in evenings, which is a more desirable place to deliver the class

Thorns:
- facilities not appropriate for evenings (unsafe or unavailable)
- Lack of access to technology required for virtual sessions
- one partner available in the evening but the second partner is unavailable
- transportation more challenging
- Safety concerns in certain neighborhoods/physical locations
- staff also have childcare needs in the evenings
- EXAMPLE: Staff will maintain their full day-time schedules, so evening classes would be additional hours on top of their normal work day

Motivation

Roses:
- Staff have more flexibility in class schedule
- Potentially receive more word-of-mouth referrals
- staff see the need in the community
- beter outcomes
- Ability to include participants from multiple facilities to virtual evening classes
- Staff getting to shift their schedule/start later in the day
- Example: Staff have struggled with attendance at classes and see the value in offering evening classes

Thorns:
- creating a custom reporting system
- Staff preferring to have consistent work hours
- Staff struggling between inherent benefits of virtual vs. physical classes and vice versa

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Breakout room #2: Mural board

🌹 **Roses**

🌵 **Thorns**

Capability

Roses:
- Staff schedule is flexible
- Some staff may prefer to work in the evenings
- Example: The program has access to the community center in evenings, which is a more desirable place to deliver the class

Thorns:
- Need to create new staffing schedule so staff will embrace this change and see it as equitable
- May interrupt staff time with their children/families
- Does staff have availibility to work in the evenings?
- EXAMPLE: Evening classes will need to be single facilitator, rather than co-facilitated, which not all staff feel equipped to do

Opportunity

Roses:
- virtual classes already happening so easy to add evening classes
- Fathers have expressed interest
- Staff can flex their time
- Example: Staff have struggled with attendance at classes and see the value in offering evening classes

Thorns:
- The facilitator may be available, but other staff are not during evening
- Child care may be harder for parents to attend
- EXAMPLE: Staff will maintain their full day-time schedules, so evening classes would be additional hours on top of their normal work day

Motivation

Roses:
- Staff excited to find additional ways to reach fathers who have schedule conflicts during the day
- Staff movitated by seeing the metrics being reached in nFORM.
- Staff motivated to increase enrollment
- Clients excited to have more opportunities

Thorns:
- Staf already feeling overburdened with all of the compete indemands of the grant implementation
- Staff does not think clients will enroll for evening
- Staff may need to arrange for childcare and meals.
- Determine facility availability for make up classes as well.

Breakout room #3: Mural board

🌹 **Roses**

🌵 **Thorns**

Capability

Flexibility in schedule | Staff have the tech savvy to implement the strategy.

Students more focued.

Evening schedule interferes with clinician's family time

EXAMPLE: Evening classes will need to be single facilitator, rather than co-facilitated, which not all staff feel equipped to do

Dangerous streets at night for both participants and faciliatator

Opportunity

Facilitators are FTE not contract so they can flex their work hours

Better attendance

Built relationship with new location

Example: The program has access to the community center in evenings, which is a more desirable place to deliver the class

A facilitator is a single parent and finds it difficult to hold evening classes because of childcare duties | A facilitator also works primarily as an outreach and recruitment specialist and therefore has little time to familiarize herself with new strategies.

Lack of location to hold classes in the evening | facilitators need to be monitored by supervisors (can't be alone in building w/ clients)

EXAMPLE: Staff will maintain their full day-time schedules, so evening classes would be additional hours on top of their normal work day

Motivation

Staff recognize that more availability means more opportunity to meet goals | Staff believe that more clients would be comfortable with evening classes

Facilitators who are employed full-time can facilitate after work hours

There is a need to have more participants completing the program | | Offering evening classes will likely increase enrollment numbers

Example: Staff have struggled with attendance at classes and see the value in offering evening classes

The hours might not be ideal (work-life balance) | | Staff is confortable with current schedule and don't see a need for change

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