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**
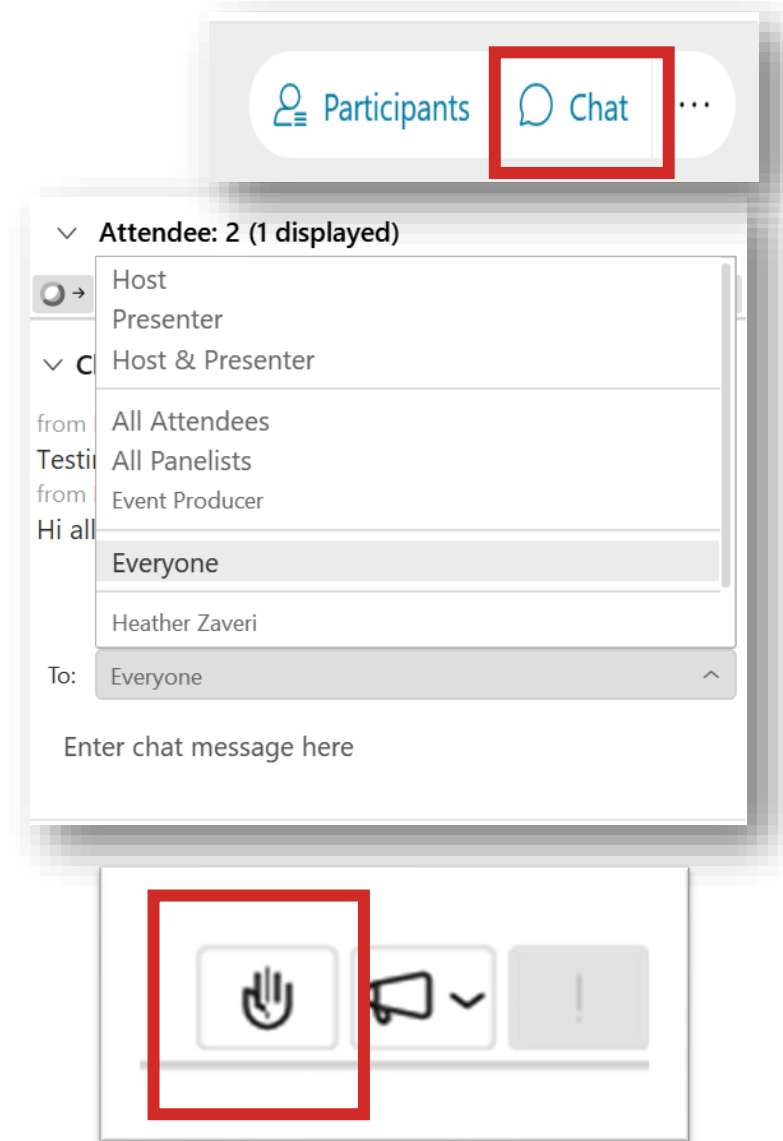
Today's agenda

/ **Using data to support improvement**

/ **Types of data used to support CQI**

/ **Data collection methods for road testing**
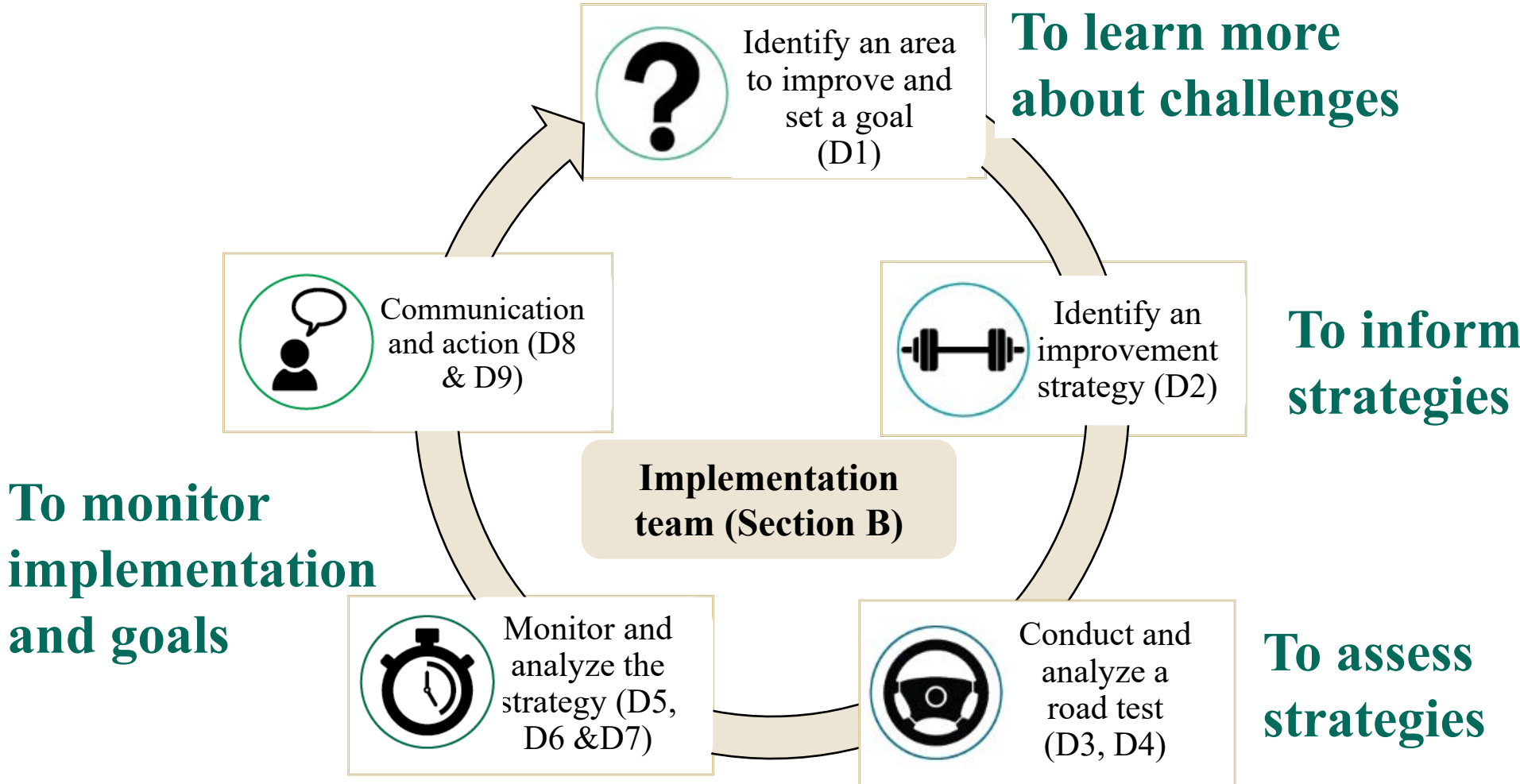
Using data to support improvement

Different ways to use HMRF program data

	Accountability	Improvement	Research
Purpose	Funder reporting, assessing performance	Develop and evaluate changes in practice	Develop and test theories about relationships between variables
Focus of data collection	Performance measures	Implementation and outcomes	Descriptive, outcomes, impact
Frequency	Continuous	Ongoing throughout steps in the CQI cycle	Throughout the study, based on research questions
Sample size	100% of those served	Enough data to learn, inform refinements	As much as is feasible with respect to research aims
Nature of data collection	Standardized, comprehensive	Low-stakes, "fail forward" mindset	Meets scientific standards held in the field

Adapted from the Carnegie Foundation for the Advancement of Teaching

When to collect data to support improvement

To learn more about challenges

Identify an area to improve and set a goal (D1)

To inform strategies

Identify an improvement strategy (D2)

Communication and action (D8 & D9)

Implementation team (Section B)

To monitor implementation and goals

Monitor and analyze the strategy (D5, D6 &D7)

Conduct and analyze a road test (D3, D4)

To assess strategies

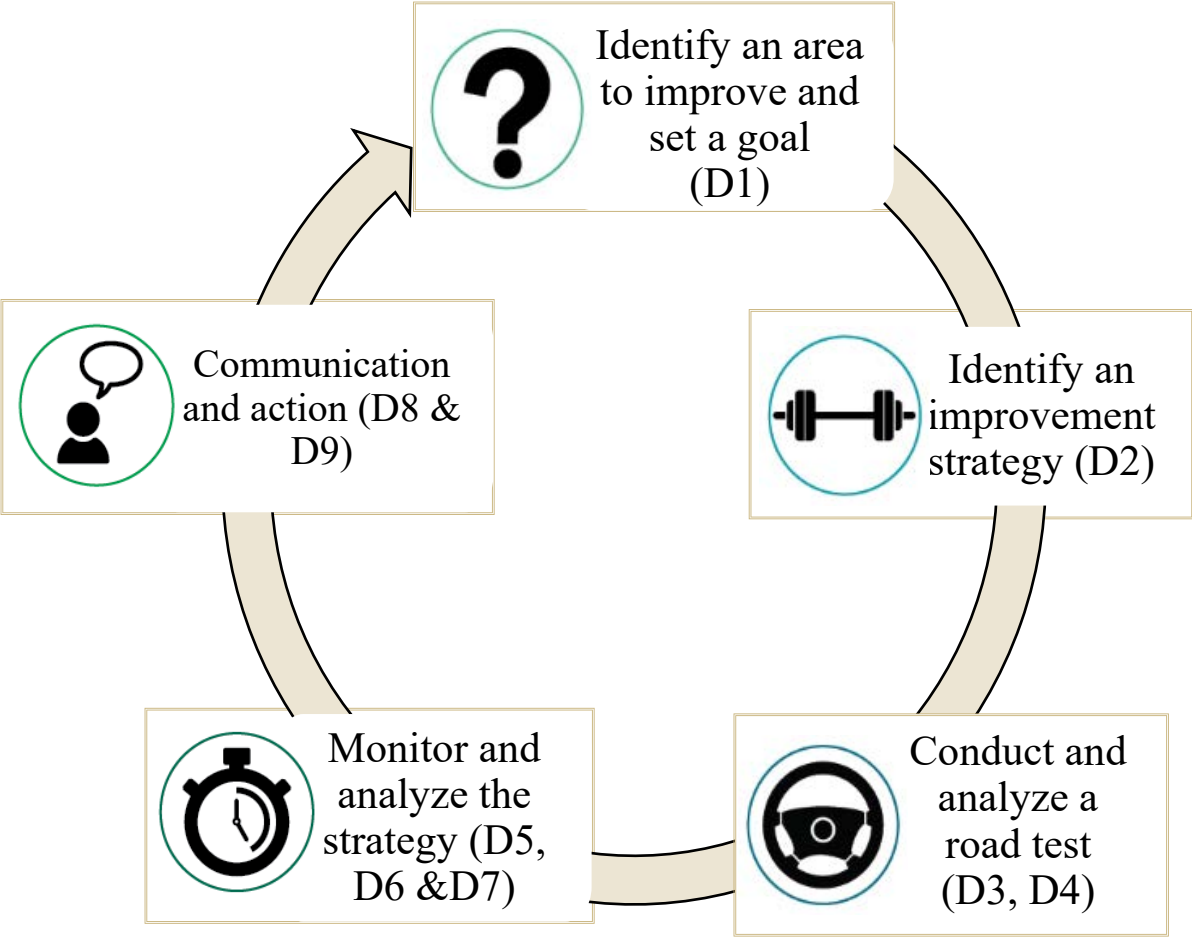# When to collect data to support improvement
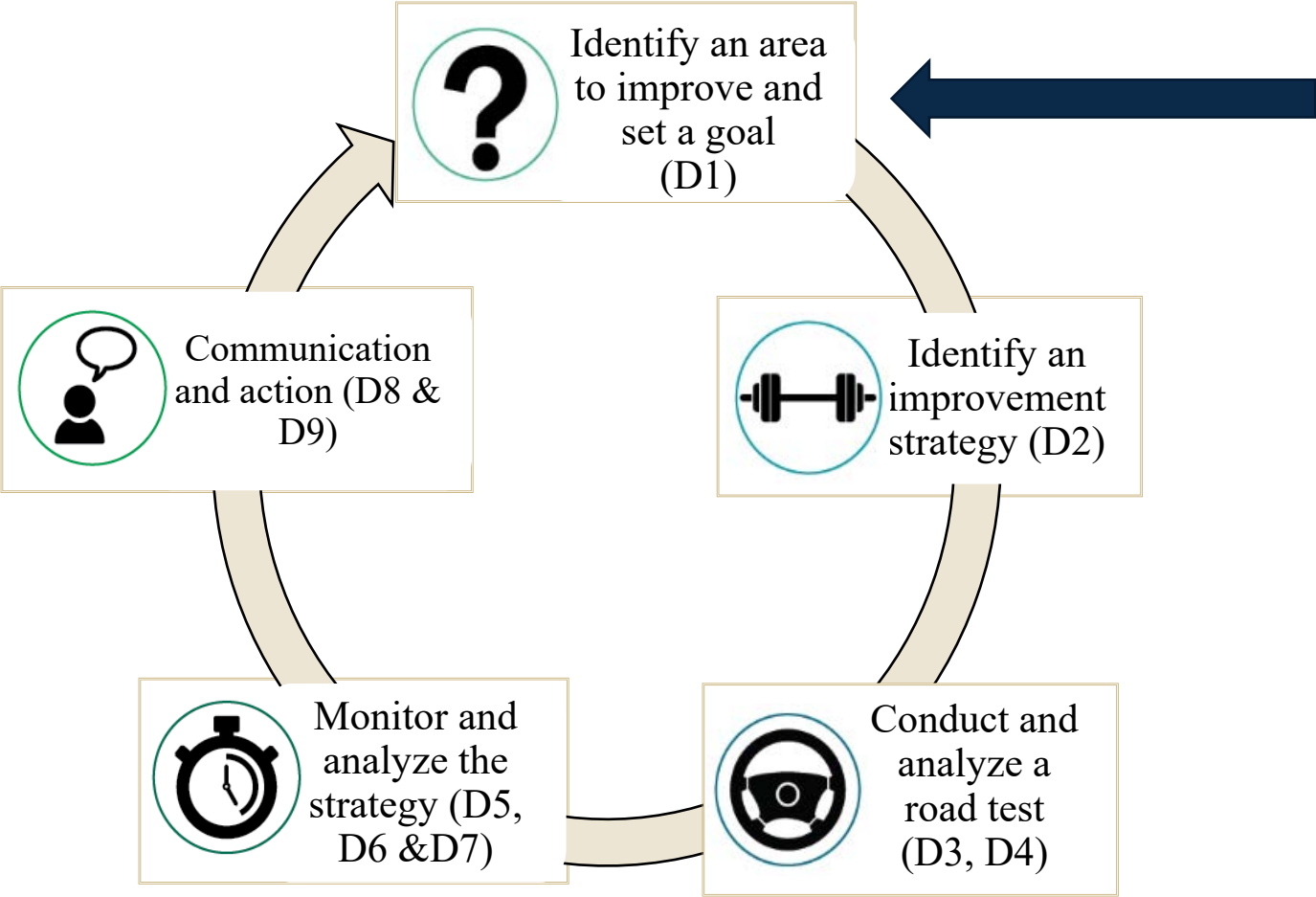
Attendance challenge: Interview clients to learn about attendance barriers

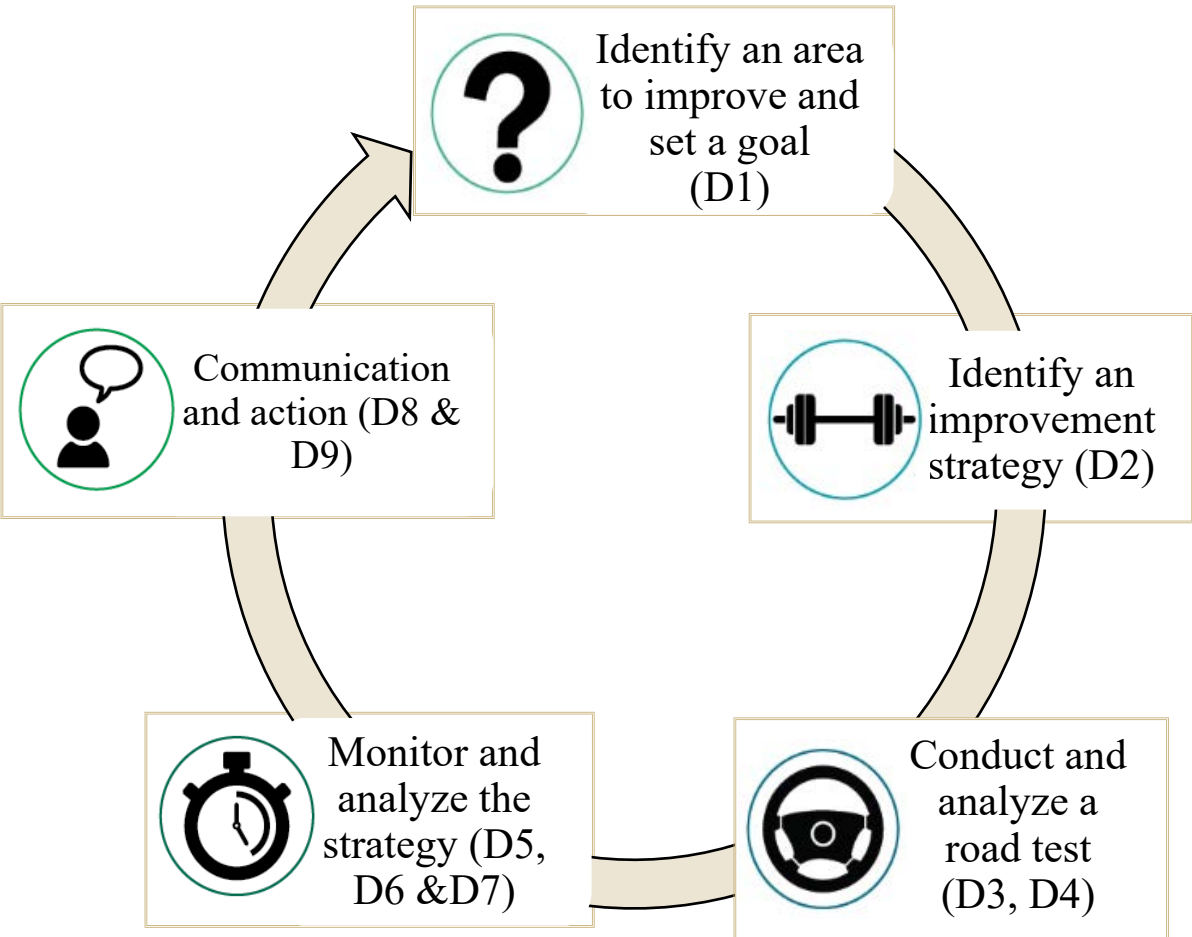- Identify an area to improve and set a goal (D1)
- Identify an improvement strategy (D2)
- Conduct and analyze a road test (D3, D4)
- Monitor and analyze the strategy (D5, D6 &D7)
- Communication and action (D8 & D9)

When to collect data to support improvement

Identify an area to improve and set a goal (D1)

Identify an improvement strategy (D2)

Conduct and analyze a road test (D3, D4)

Monitor and analyze the strategy (D5, D6 &D7)

Communication and action (D8 & D9)

Survey clients to learn about which program supports would be most beneficial to helping them attend classes

When to collect data to support improvement

Identify an area to improve and set a goal (D1)

Identify an improvement strategy (D2)

Conduct and analyze a road test (D3, D4)

Monitor and analyze the strategy (D5, D6 &D7)

Communication and action (D8 & D9)
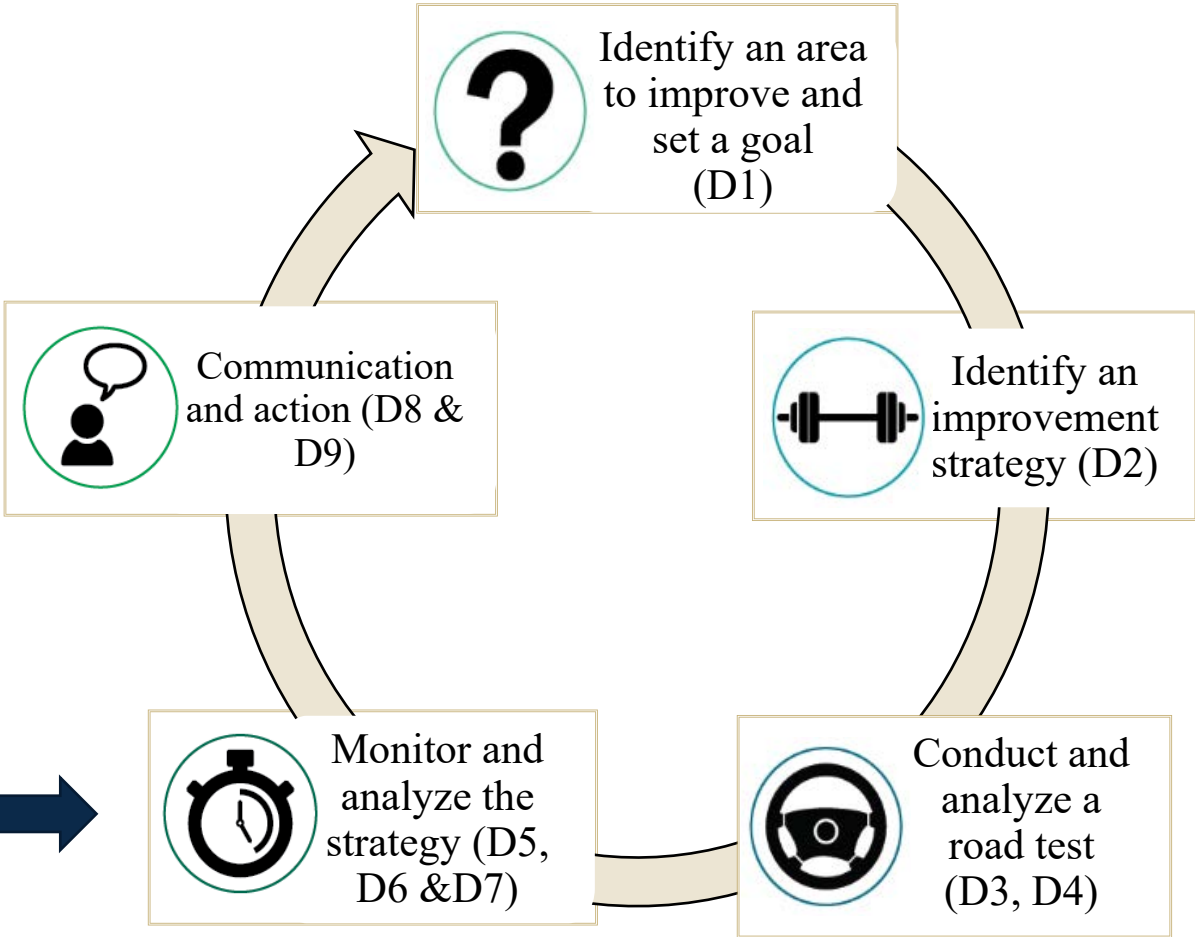
Conduct a focus group or interviews with staff who were responsible for implementing a new improvement strategy to gather feedback and suggestions
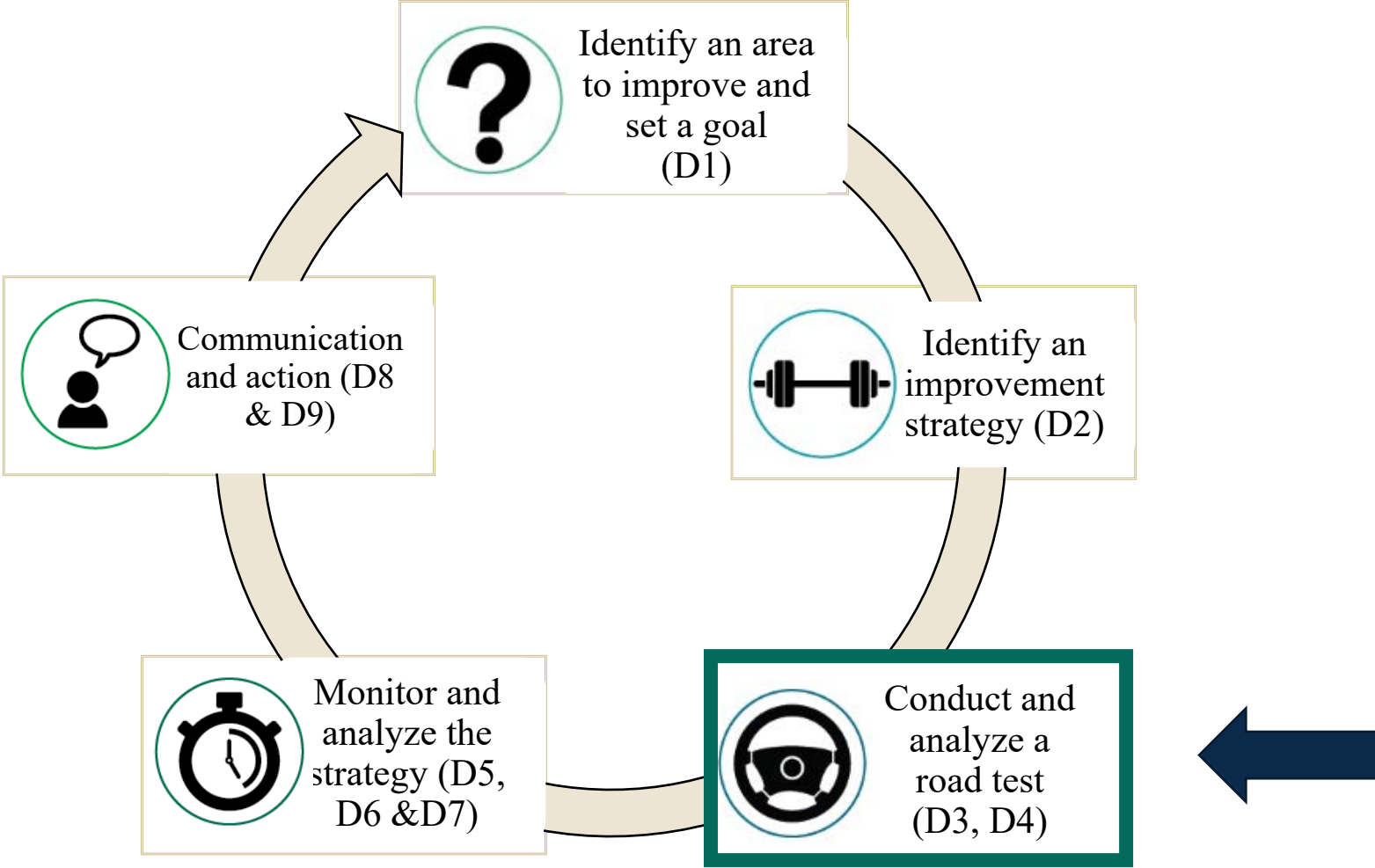
When to collect data to support improvement

Identify an area to improve and set a goal (D1)

Identify an improvement strategy (D2)

Conduct and analyze a road test (D3, D4)

Monitor and analyze the strategy (D5, D6 &D7)

Communication and action (D8 & D9)

Examine existing data or track a new metric to assess progress toward your SMART goal

Our focus today

Identify an area to improve and set a goal (D1)

Identify an improvement strategy (D2)

Conduct and analyze a road test (D3, D4)

Monitor and analyze the strategy (D5, D6 &D7)

Communication and action (D8 & D9)

Data collection for road testing

Review: Why road test?

/ **Road testing is a process for trying out an improvement strategy before committing to it, in order to:**

- Understand the strategy's feasibility
- Understand the strategy's promise for improvement

/ **Road tests inform tweaks and refinements before scaling up and investing more resources**

Implement idea

Refine and improve

Gather feedback from users
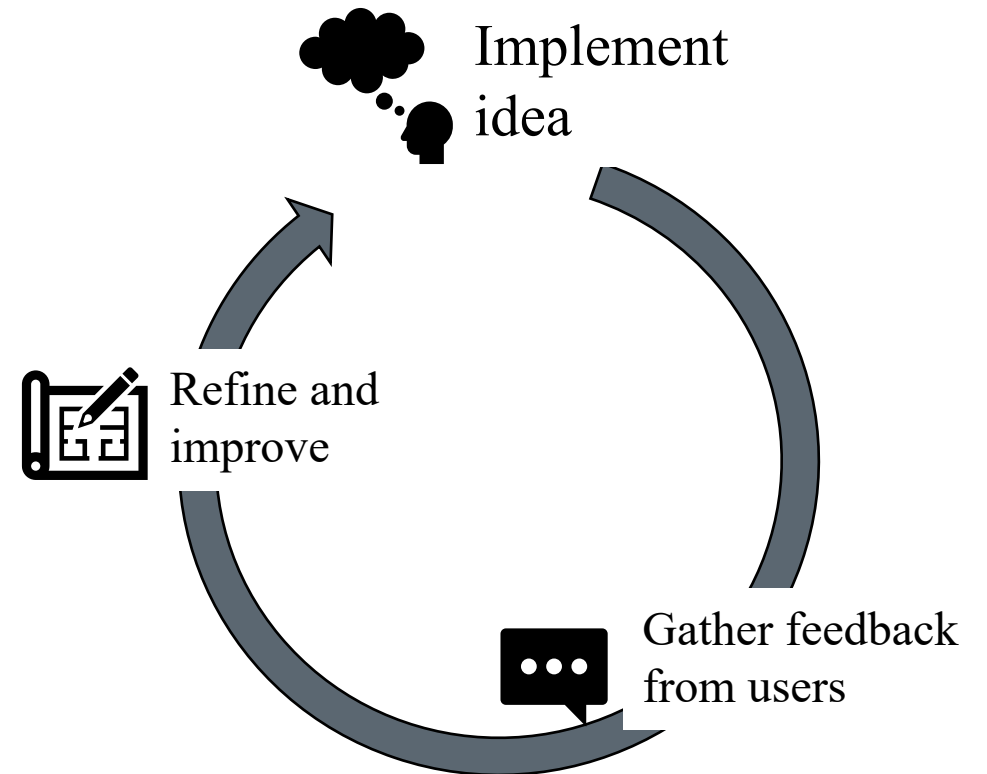
Review: What goes into a road test plan?

/ **Learning questions that focus on**

- Implementation: Is it feasible to implement the strategy as designed? What were the challenges? How can the strategy be refined to address challenges?
- Early promise: Does the strategy appear to influence interim outcomes that you expected to change, such as attitudes, behaviors or skills?

/ **Implementation plan specifies logistics and data collection activities**

- How will you answer your learning questions?
- What data will you collect and how will you collect it?
- From whom will you collect data and at what times?

How will you answer your learning questions?

HMRF CQI template Section D3. Conducting a road test

f.   What type of feedback and information will you collect during the test?
     (Check all that apply)

Staff feedback through:
☐ Questionnaire
☐ Focus group
☐ Interview
☐ nFORM
☐ Other *(please specify)*

Client feedback through:
☐ Questionnaire
☐ Focus group
☐ Interview
☐ nFORM
☐ Other *(please specify)*

Others' feedback:
Please specify who and how

Surveys, feedback forms, exit tickets

/ Good when:

- You need to gather opinions or perspectives from a large number of people (for example, an entire class/workshop group)
- You want to assess implementation or early promise

/ When using for road testing:

- Keep the survey short by limiting questions to those you *need* to ask to understand how a strategy is working
- As with any survey, ensure questions are primarily closed-ended rather than open response

/ See feedback form and exit ticket templates on HMRF Grant Resource site
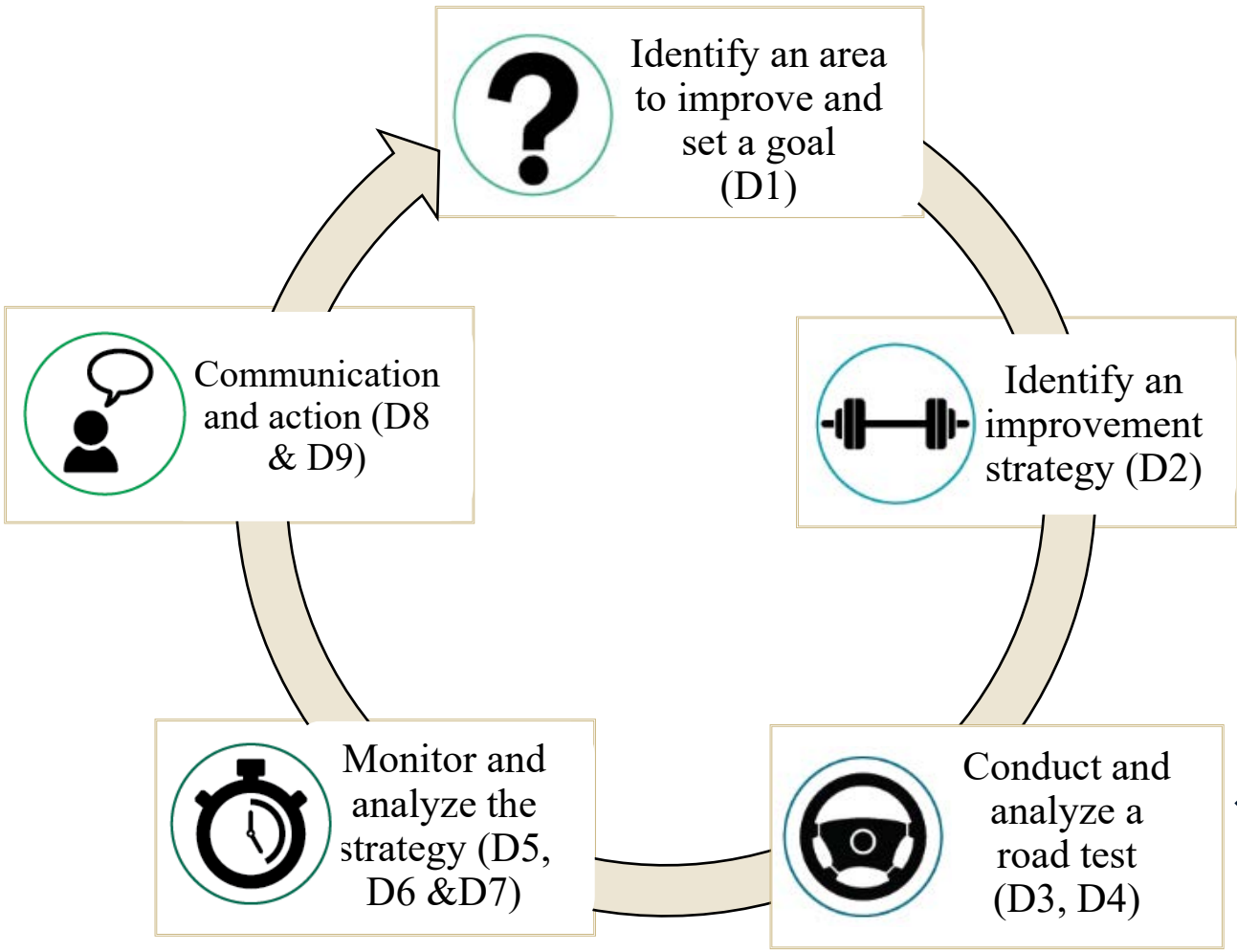
Peer sharing: Kyle Kaminicki, UAMS Northwest Regional Campus

/ **Fatherhood FIRE**

/ **Challenge**

/ **Strategy**

/ **How was a survey used for road testing?**

/ **In what ways did you find survey collection helpful? What did you learn?**

/ **What lessons did you learn about the data collection process? Easy/hard? What would you do same/different?**

Surveying staff to refine a tool

Identify an area to improve and set a goal (D1)

Identify an improvement strategy (D2)

Conduct and analyze a road test (D3, D4)

Monitor and analyze the strategy (D5, D6 &D7)

Communication and action (D8 & D9)

Surveyed staff for feedback on data dashboard, followed up with a debrief conversation

Interviews and focus groups

/ **Good when:**

- You need nuance or detail that can't be provided via close-ended questions
- To understand the *why*

/ **When using for road testing:**

- Determine if a focus group or one-on-one interviews will allow you to understand the range of experiences from those who experienced the strategy
- Ensure you are hearing from all relevant groups experiencing your strategy (for example, staff and clients)
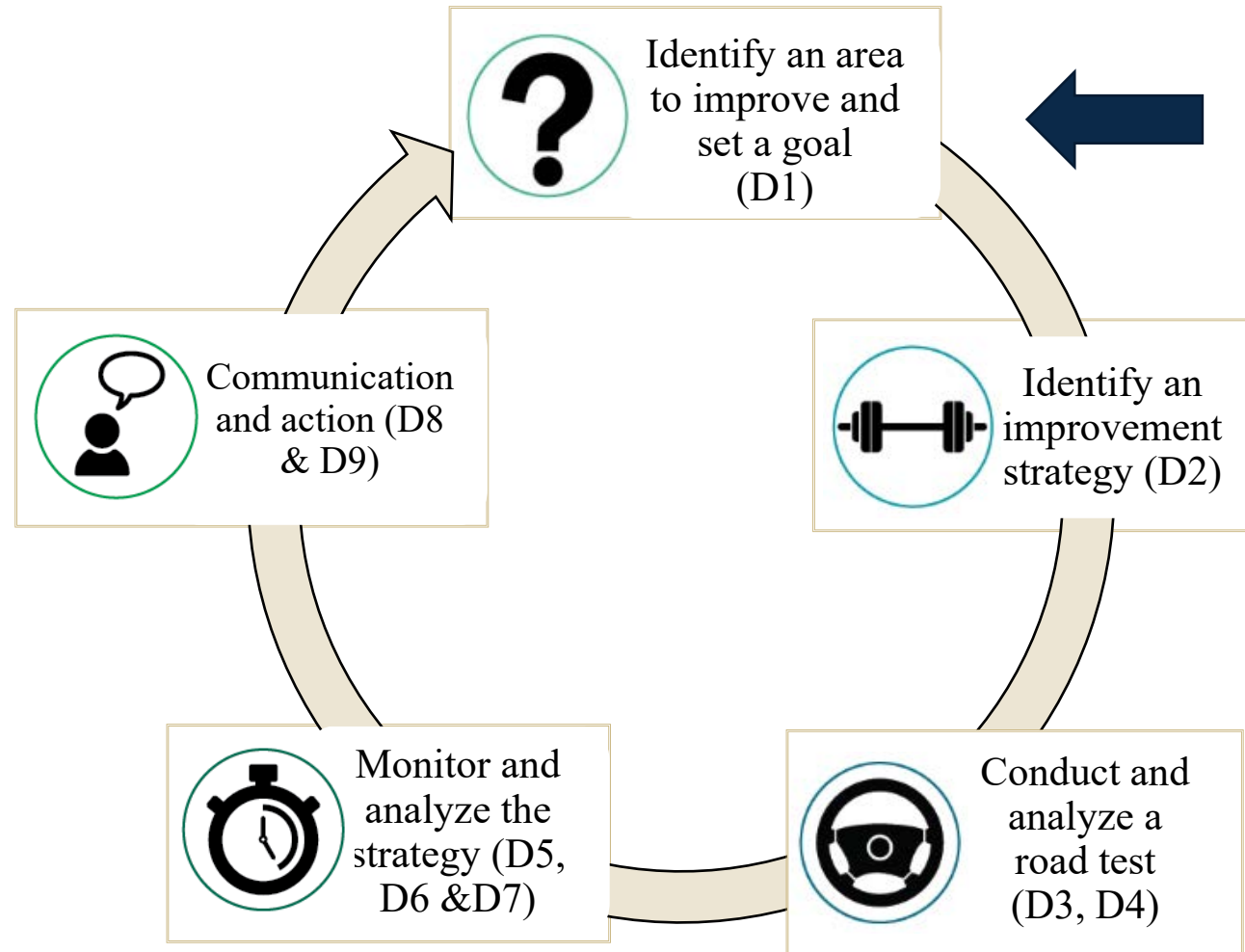
Peer sharing: Ruth Van Dam, Bethany Christian Services (Michigan)

/ **Ready4Life**

/ **Challenge**

/ **Strategy**

/ **How were focus groups used for road testing?**

/ **In what ways were focus groups helpful? What did you learn?**

/ **What lessons did you learn about the data collection process? Easy/hard? What would you do same/different?**

Using focus groups/interview to refine intake

Identify an area to improve and set a goal (D1)

Identify an improvement strategy (D2)

Conduct and analyze a road test (D3, D4)

Monitor and analyze the strategy (D5, D6 &D7)

Communication and action (D8 & D9)

Conducted a parent focus group to identify a challenge with the intake process

Gathered feedback from youth to refine the updated intake process

nFORM 2.0 and other administrative data

/ **Good when:**

- You need to understand outputs/efforts (for example, how many individual service contacts did staff have with clients last week?)

- Your existing data will help you to respond to learning question(s), and limiting new data collection is a plus!

/ **When using for road testing:**

- Check that the data will help you to understand how the strategy was implemented (for example, examining whether staff record the expected number of service contacts)

Additional data collection options

Observations

- Allow for observing behaviors directly rather than collecting self-report data from clients or staff

Human-centered design activities

- Designed to collect thoughts and feedback from a large group; good for encouraging broad participation and hearing all voices

Existing document reviews

- Draw on information from existing documents, which avoids burden on others (for example, reviewing case notes or program forms, to assess a strategy)

Overarching tips for data collection to support road testing

/ **Be clear on your purpose first**

- Clarity of purpose for collecting data will help your team to determine what to ask and the best method for collecting responses

/ **Seek usefulness, not perfection**

- Data are for learning, not judgement; you only need enough to help inform your next steps

/ **Check with your IRB or review board on your data collection plan**

/ **Pilot data collection tools**

- As relevant, piloting surveys, observation rubrics, data collection forms or other tools can help your team to get in front of confusing questions/elements and support quality

/ **Determine how you will analyze the data you collect**

Adapted from the Institute for Healthcare Improvement

Developing a CQI data collection plan

/ **On the CQI template, you will note the type of feedback and information you will be collecting**

/ **Developing a detailed plan related to each activity helps to ensure your team stays on track**

/ **Be sure to update your plan to reflect any changes**

/ **No matter what type of data you are collecting, the <u>nFORM 2.0 Data Collection Plan Template</u> can help you plan and organize**

/ **The <u>Data Collection Logistics Manual</u> is also helpful for CQI, including the appendix on protecting client data**

Developing a CQI data collection plan

Purpose	Data collection activity	Preparation steps	Who will collect the data?	When will the data be collected?	Analysis plan
To understand **challenges and successes related to implementing** our strategy	Interviews with staff	Data manager to develop interview protocol and schedule interviews with staff	Data manager (CQI team lead)	At the end of the 6-week road test	Data manager will code for themes in week after road test
To understand how clients **experienced the strategy**	Pulse survey	Data manager will develop survey; program manager will review	Facilitators to administer after final class	During the final class for current group	Analyst will enter surveys, data manager will run frequencies

Share with us

/ **What data have you collected to learn about your CQI strategies?**

/ **What did you learn?**

/ **How did you use that information?**

Questions?

Announcements

New URLs for nFORM 2.0

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

/ **Please update your nFORM 2.0 bookmarks to the new URLs—including on devices used for client surveys**

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

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
- Stay tuned for new resources!

/ **Next office hours on April 26, 2022, from 2-3pm ET**

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