

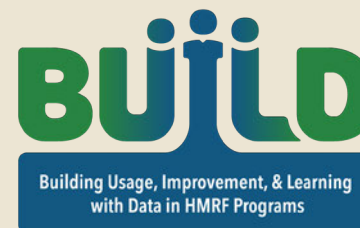
Building a compelling 4DX dashboard

Continuous quality improvement (CQI) office hours

December 6, 2022 | 2:00 – 3:00pm ET



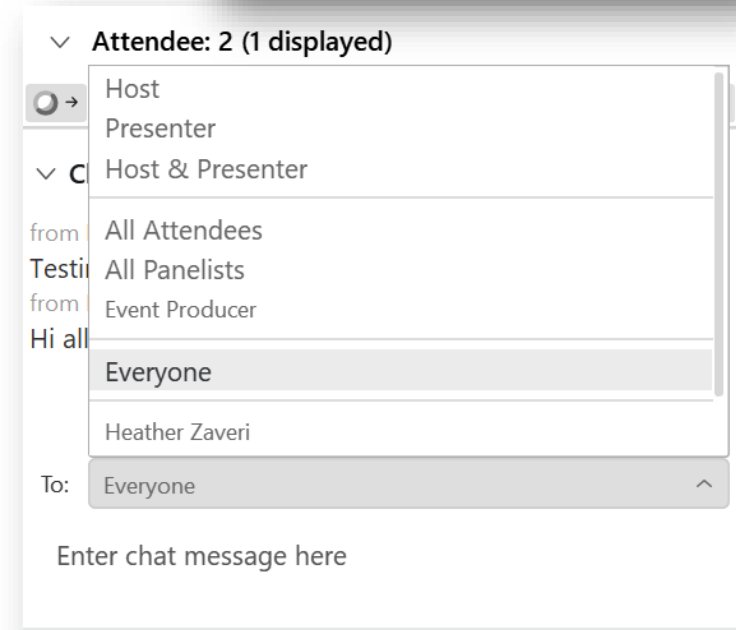
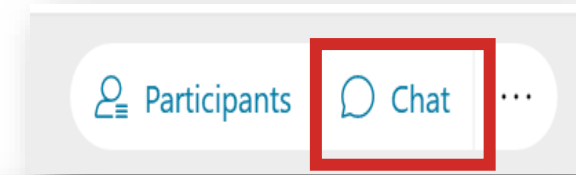
OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families





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

- / Recap of 4DX (Four Disciplines of Execution) framework**
- / Designing a compelling dashboard**
- / Maintaining the dashboard**
- / Lessons from Auburn University's experience**



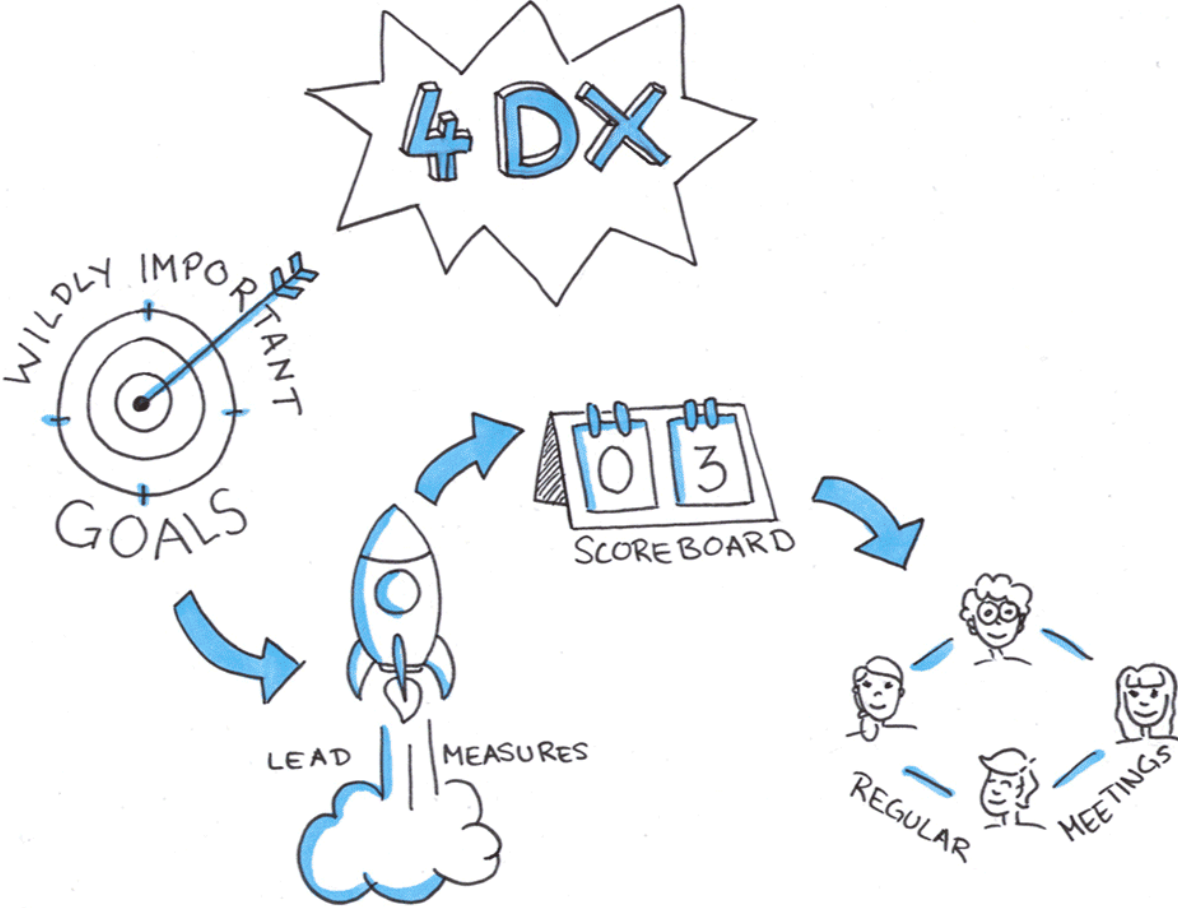
A recap of the 4DX framework





What is 4DX?

- / “A simple, repeatable formula for executing your most important priorities”
- / A framework that ties together several familiar CQI concepts





The four components of 4DX

1

Focus on the Wildly Important Goal (WIG)

2

Act on the lead measures

3

Keep a compelling dashboard

4

Create a cadence of accountability



**Keep a
compelling
dashboard**

Review: The value of a dashboard

- / Keeps the focus on your goal by displaying the most important measures**
- / Makes data accessible, which helps make it more actionable**





Designing a compelling dashboard





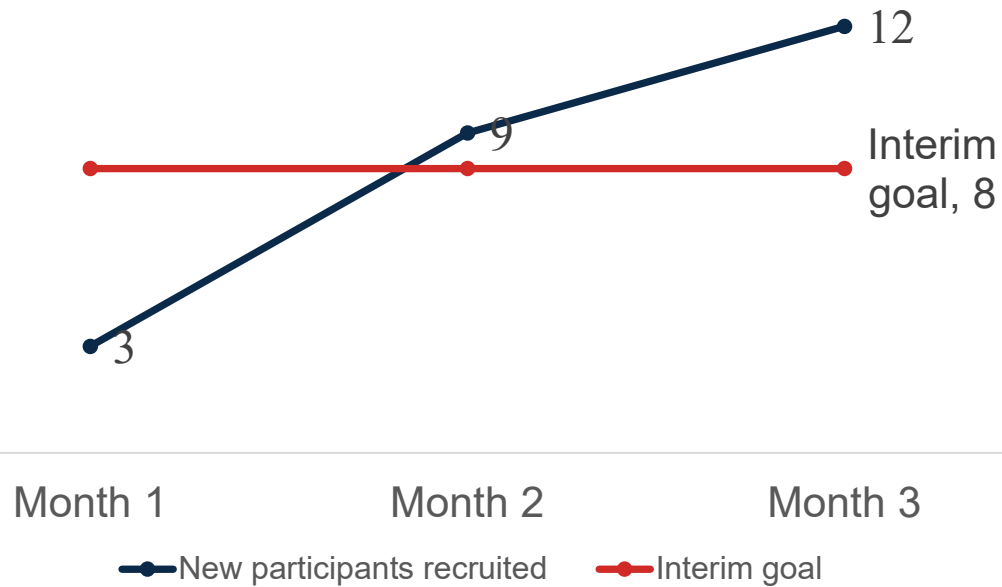
Dashboards should be motivating

- / Display the WIG and key lag measures to show progress toward the WIG**
- / Show where you started and note your goal to make it easy for staff to understand progress**
- / Display interim and long-term outcomes to let staff celebrate interim wins**

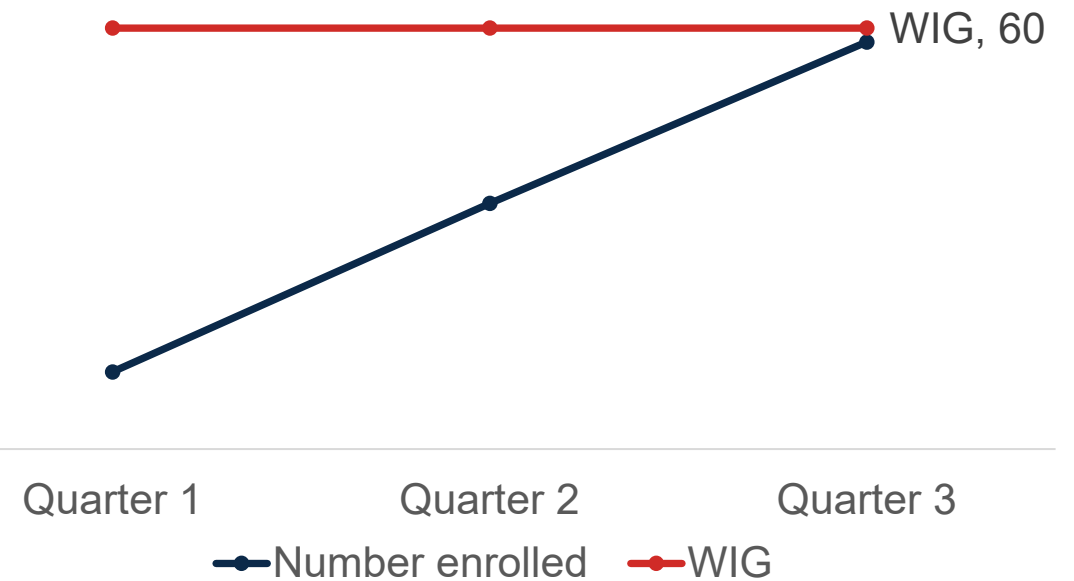


Dashboards should be motivating

Interim goal: Receive 8 referrals from partners each month



Our WIG: Enroll 60 clients per quarter





Dashboards should be actionable

/ Include lead measures

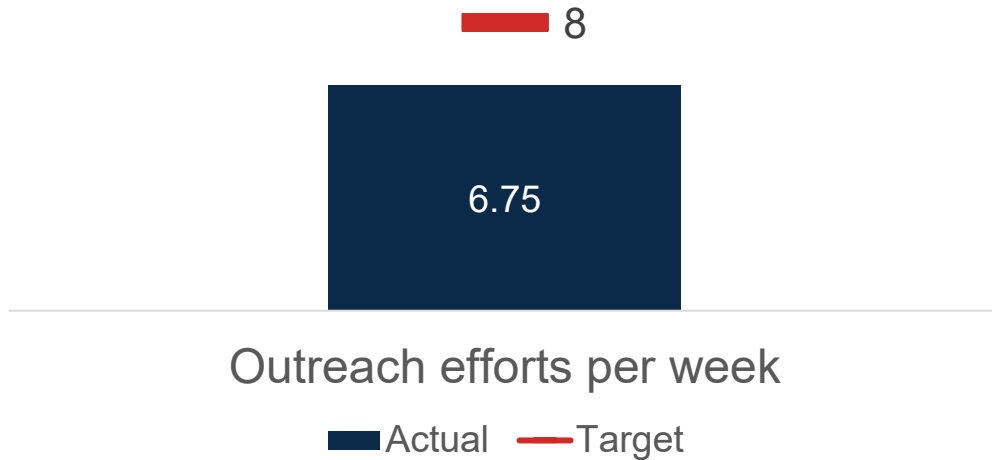
/ Break down measures by staff, partner, or site



Dashboards should be actionable

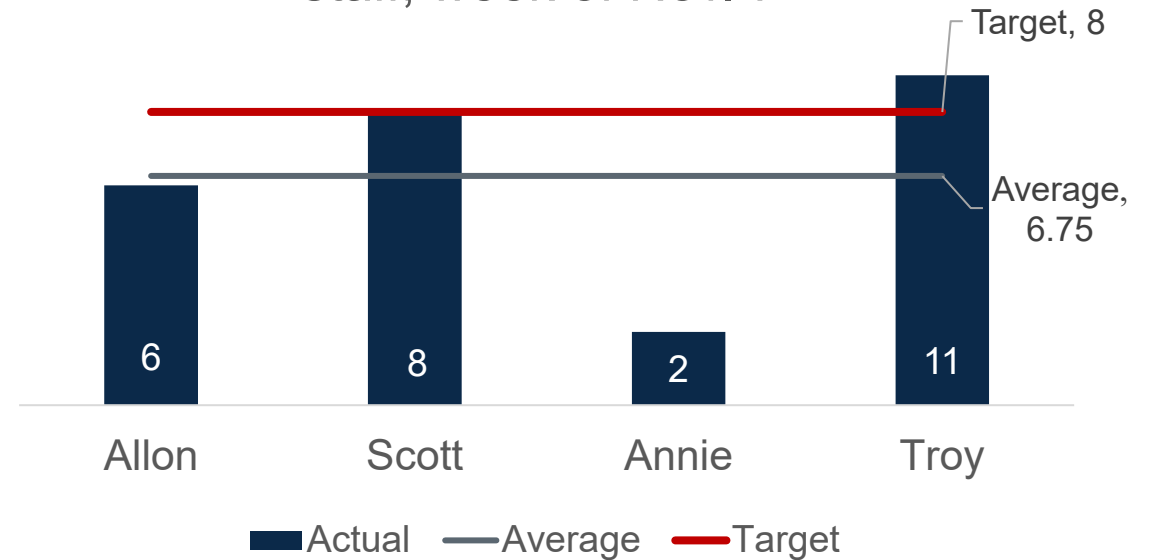
Good

Average # of prospective clients reached, week of Nov. 7



Better

of prospective clients reached by staff, week of Nov. 7





Auburn's process for developing a dashboard

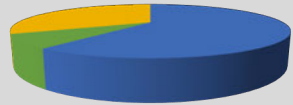
- / **Walkthrough of Auburn's dashboard**
- / **Why Auburn developed a dashboard**
- / **How Auburn determined what to include**



PY3 Goal to Reach: Baseline Survey Rate = 90%

Indicators To Help Us Reach our Goal

FRC Trial Emails/Texts (recruitment period)



- % Trial Sent & Received
- % Changed Contact Info
- % Participant Didn't Respond

FRC Survey Night

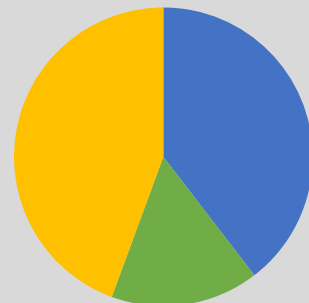
Participants
Attended

0 20 40 60 80 100

FRC Reminder Emails/ Texts (baseline window)

AU	✘	FSC	✘
COC	✘	SAFE	✘
FGC	✘	TOP	✘

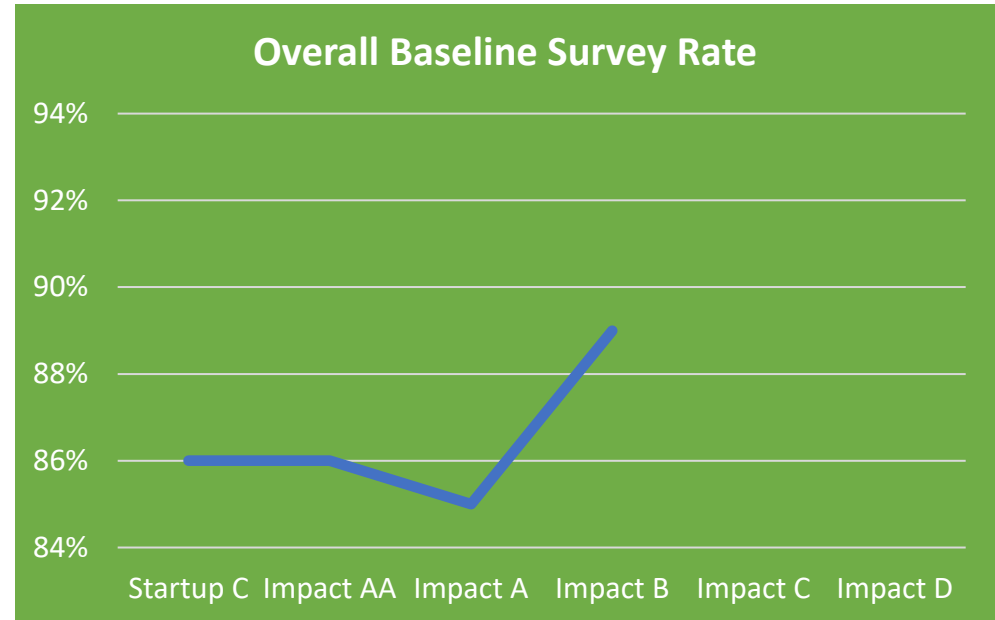
AU Reminder Calls (baseline window)



- % Call Answered, No Contact Change
- % Changed Contact Info
- % Left VM or Text

Progress Toward GOAL

Overall Baseline Survey Rate



Impact B Baseline Rate = 89%!!

Partner-Specific Updates

AHMRE PY3: FSC						
	Target Enrollment (couples)	Actual Enrollment (couples)	% of Target Enrollment Met	# T1 Surveys (individuals)	# T1 Surveys (couples - both partners)	% T1 Completed*
Impact B	25	35	140%	57	22	81%

*% T1 Completed = # T1 Surveys / # individuals enrolled

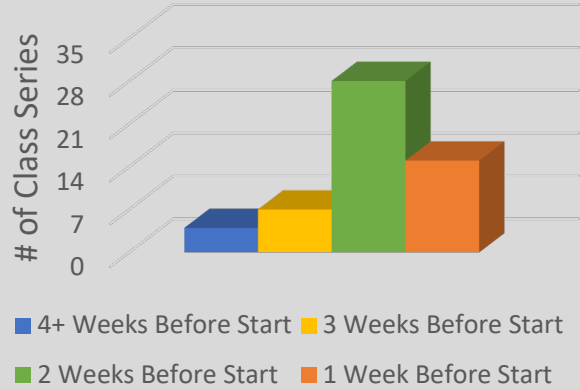
Goal to reach by Dec 2022: IC Return Rate = 70%

Indicators To Help Us Reach our Goal

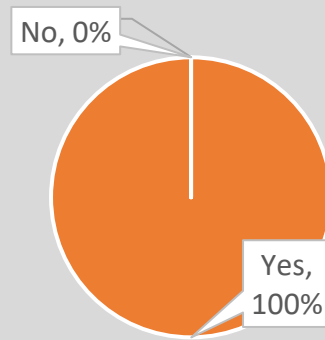
Progress Toward GOAL

Overall IC Return Rate

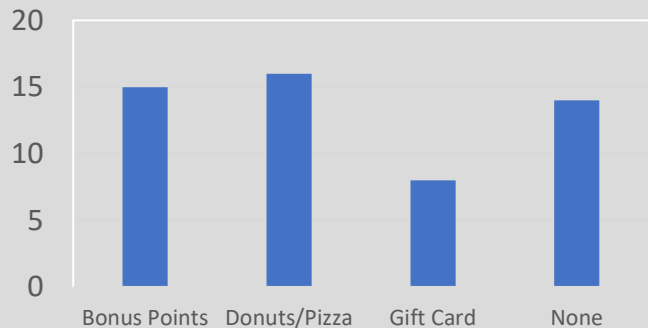
IC Return Window



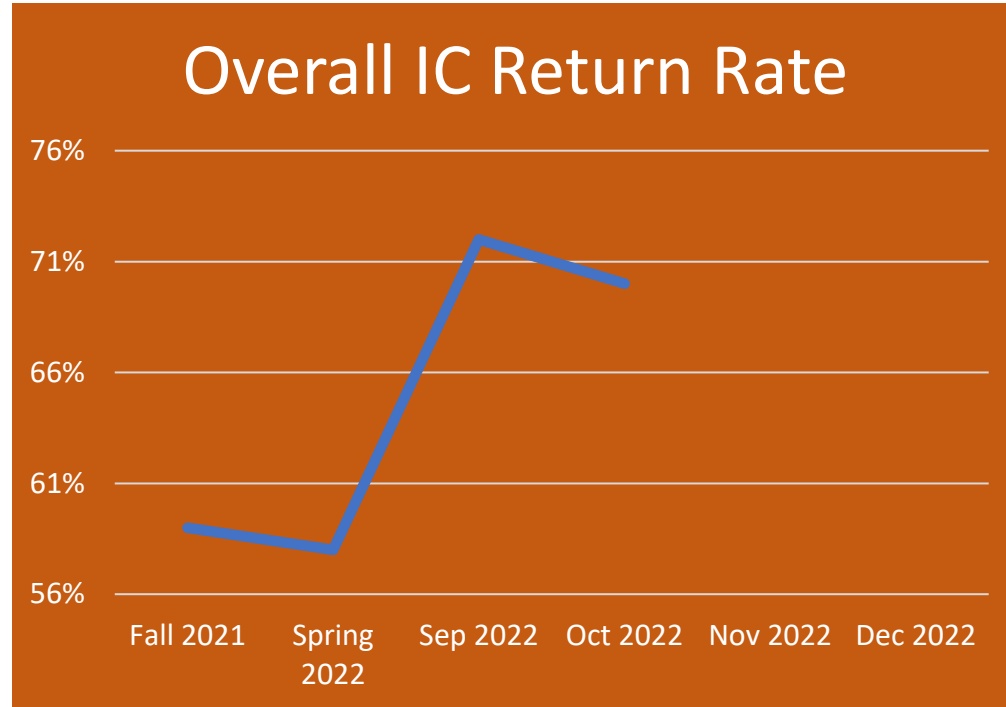
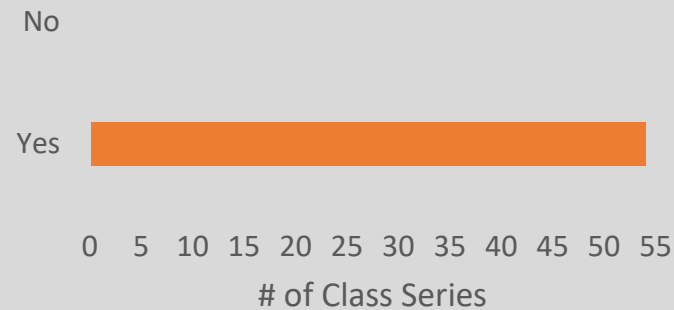
of Teachers Who Viewed IC Video



Incentives Offered for Returned ICs



Weekly Teacher Follow-Up



Partner-Specific Updates

AYRE Academic Year 2022-2023: ACES							
	Program Target Enrollment	Program Enrollment (to date)	% of Program Enrollment Met	LIE Target Enrollment	LIE Enrollment (to date)	% of LIE Enrollment Met	IC Return Rate*
OVERALL	300	263	88%	210	207	99%	79%

*IC Return Rate = LIE Enrollment / Program Enrollment



Share with us

Poll Question: Does your team track staff and/or partner contributions to your WIG?

How do you establish a culture where staff and partners are comfortable reviewing their progress in this way?





Foster a collaborative design process

- / Get feedback from staff early and often on how to display key lead measures**
 - Do staff understand the charts and/or the way data are presented?
 - How would staff prefer to access the dashboard?
 - Are there any other metrics staff would benefit from seeing on a regular basis beyond the key lead measures? Or other ways to aggregate the data?
- / The more staff are involved with developing and testing the dashboard, the more likely they will be to use it**



4DX compared to other CQI dashboards

/ 4DX dashboard

- Helps staff and partners track progress on their own contributions to the WIG
- Keep it simple: What did I accomplish last week compared to my goals?
- How do my efforts feed into the team's goals?

/ CQI team dashboard

- Should include all the measures needed to inform strategy in a clear and concise design
- Aggregated to the program-level: How is the team doing with team goals? *E.g., Staff will contact 20 new participants per month*
- For which activities is the team falling short? What barriers is the team facing?



Maintaining the dashboard





Keeping your dashboard updated

- / To ensure the dashboard is useful for informing strategy and actions, it must be updated frequently**
 - Real-time is the gold standard
 - Consider weekly updates if your dashboard is updated manually
- / Determine who is responsible for updating and sharing the dashboard**
- / Determine how and how often to share the dashboard, and be consistent**



Tips for managing the dashboard

/ **Designate one person to manage the dashboard**

- Ensure any needed data entry is done timely
- Ensure it gets shared with staff and/or partners at designated time periods

/ **Make sure it is easy to update**

/ **Don't include so many measures that the dashboard becomes burdensome to update**

/ **Check in with staff and/or partners over time**

- Are they finding the metrics useful to guide their efforts toward the WIG?



Auburn's process for updating the dashboard

- / Keeping the dashboard up-to-date and relevant**
- / Training partners**
- / Motivating partners to track extra data**





Share with us

If you have a dashboard, how do you manage it? Who is responsible for keeping it up-to-date?





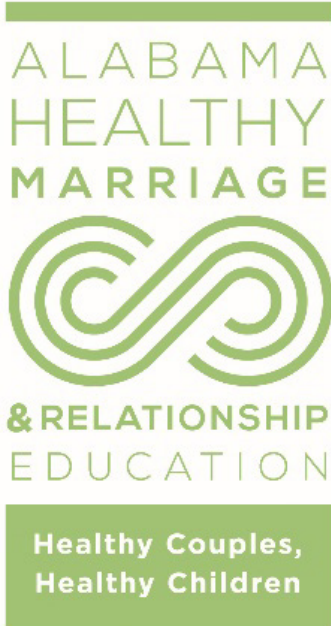
Final check on your dashboard

- / Can staff quickly determine whether they are hitting their targets or making progress?**
- / Is it accessible? Does everyone know how to view it?**
- / Does it include lead and lag measures?**
- / Is it up-to-date?**



Final reflections from Auburn

- / **Lessons learned**
- / **Auburn's next steps with their dashboards**





Announcements

/ Next office hours will return to the fourth week of the month (January 24, 2-3 p.m. ET) – *Happy New Year!*



- *January's topic: Exploring the fourth discipline of the 4DX framework – creating a cadence of accountability*

/ For more resources:

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

- Check out [slides](#) from a webinar on findings from an ACF-sponsored study on workshop implementation factors that predict the likelihood of HMRF program completion

/ Submit questions to hmrfcqi@mathematica-mpr.com