Mathematica
Progress Together

Establishing a cadence of accountability

Continuous quality improvement (CQI) office hours

January 24, 2023 | 2:00 – 3:00pm ET

HMRF
HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

OPRE

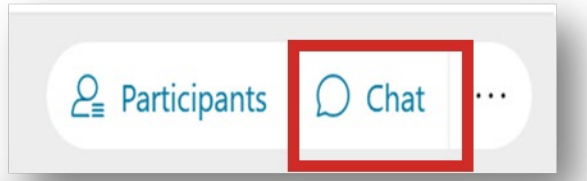
OFFICE OF FAMILY ASSISTANCE
An Office of the Administration for Children & Families

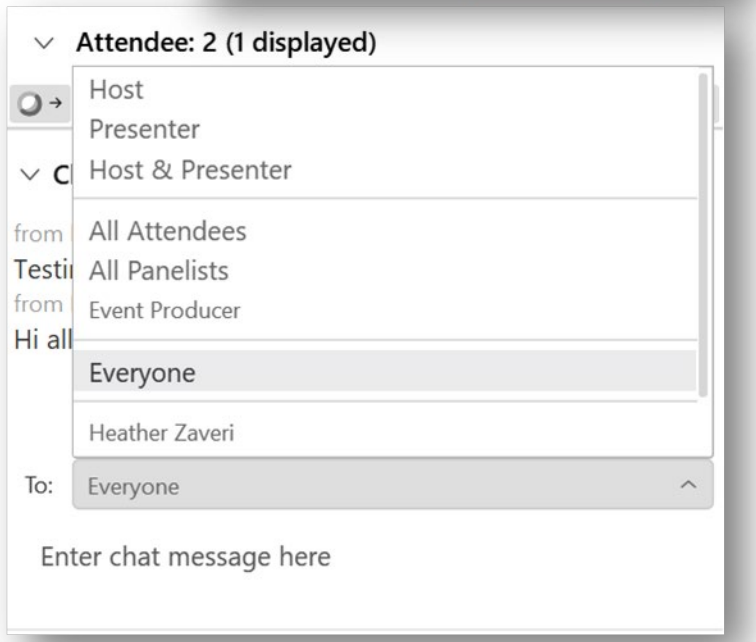
BUILD
Building Usage, Improvement, & Learning with Data in HMRF Programs

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





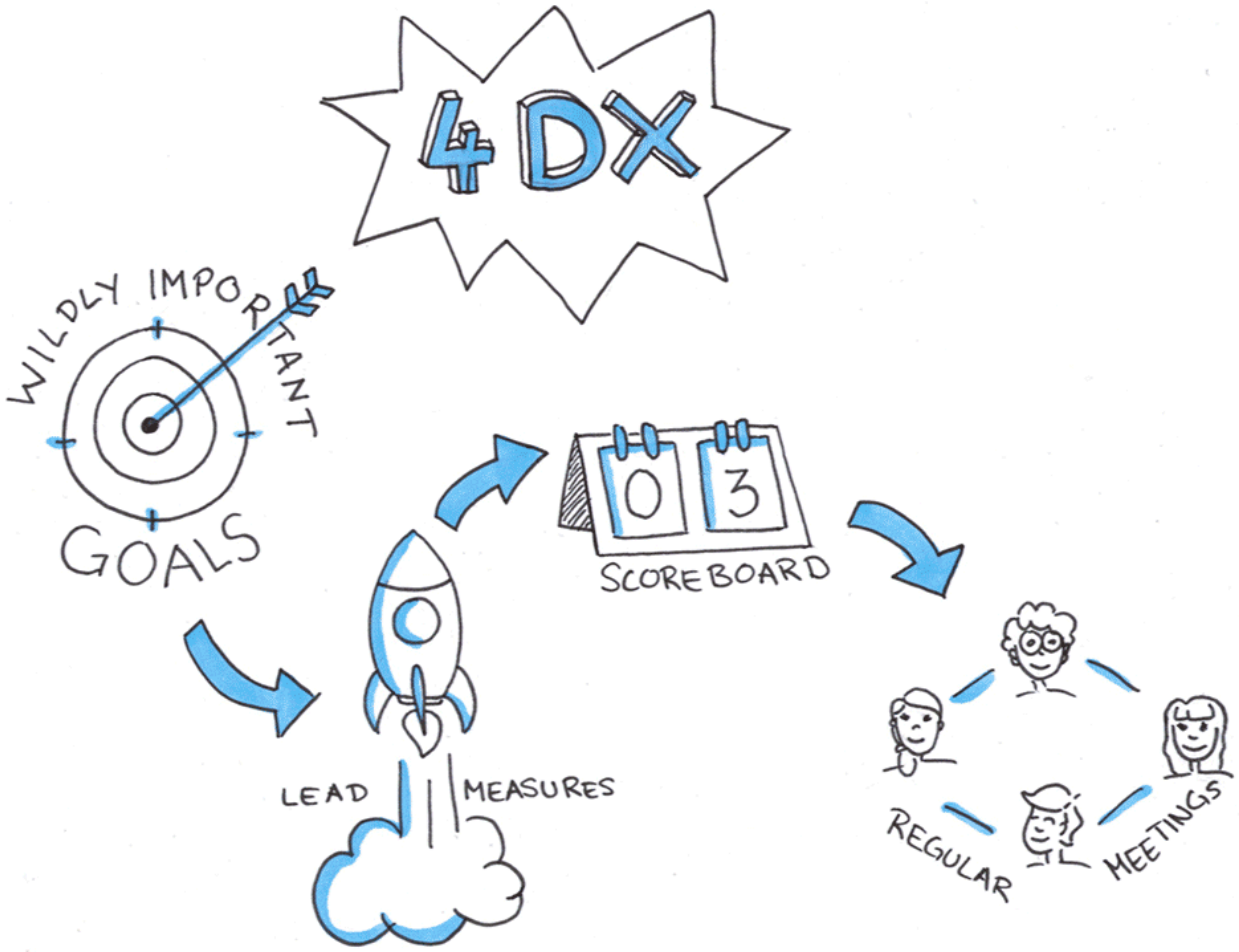
Today’s agenda

- Recap of 4DX (Four Disciplines of Execution) framework
- Establishing a cadence of accountability
- Using a dashboard at a WIG session
- Making and reporting out on commitments

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

Establishing a cadence of accountability

What is a cadence of accountability?

- **A regular schedule of meetings focused exclusively on the WIG**
- **An opportunity for staff to consider and set commitments related to the specific actions they intend to take to contribute to the WIG**
- **Meetings serve a dual purpose:**
  - To reinforce the primary importance of the WIG
  - To establish accountability for commitments to progress toward the WIG

Establishing WIG sessions

/ Brief, frequent, consistently held meetings

- Daily or weekly meetings no longer than 20 minutes help staff maintain focus
- Particularly useful when road testing a strategy
- May not be needed for every step in the CQI cycle

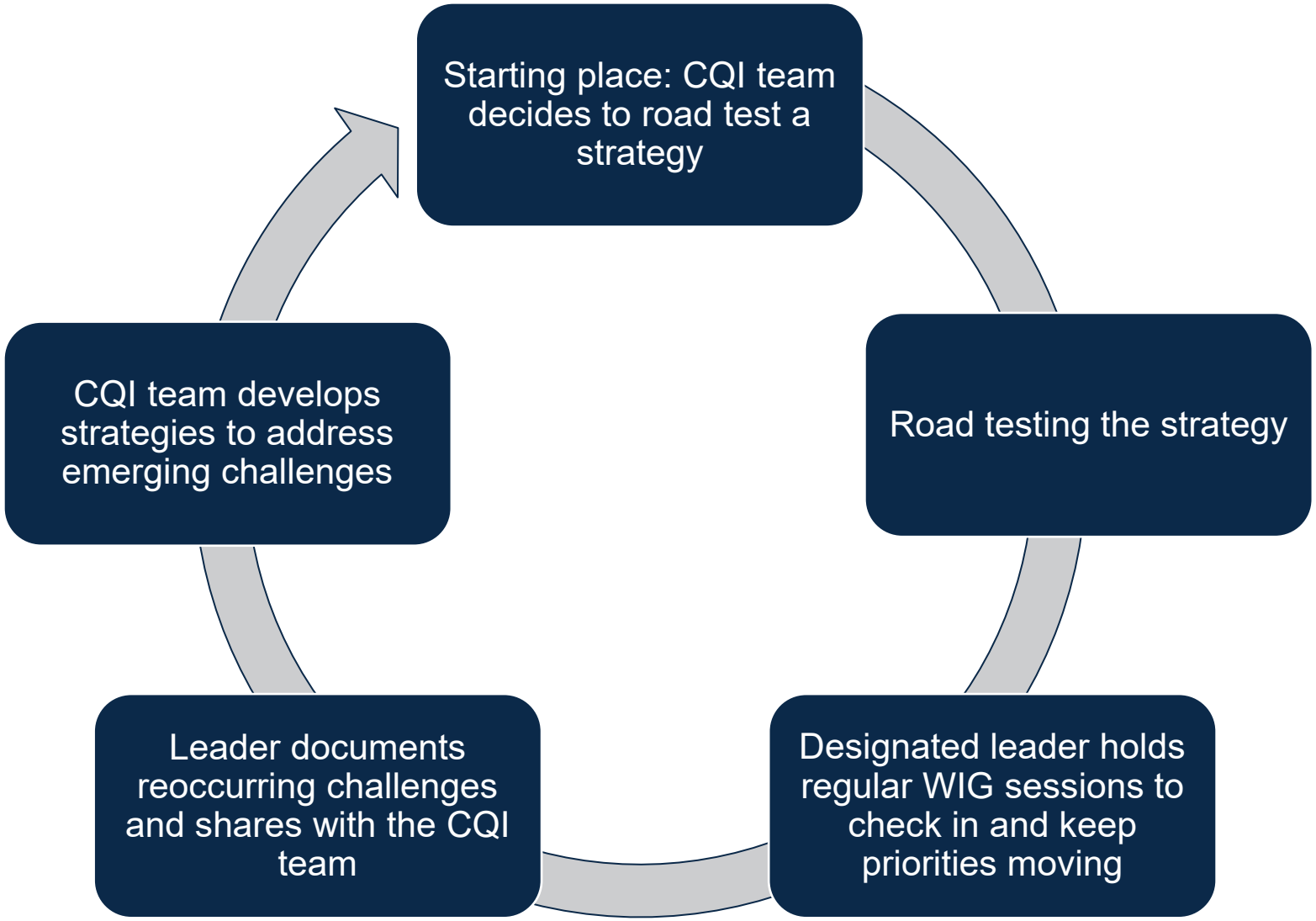
/ Motivate action to achieve the WIG

- Follow a predetermined agenda focused only on the WIG
- Involve all staff who have a role in working toward a given WIG
- Energetic and collaborative!

/ Designated WIG session lead keeps team on track

- CQI lead ensures connection to overall CQI effort – that person may or may not lead WIG sessions

How WIG sessions inform CQI



WIG sessions and CQI team meetings

WIG sessions

- Keep the team on track and help to overcome day-to-day obstacles
- Example: “I’ve tried calling Springfield Community Services five times to discuss our program, and I always have to leave a message!”
- Identify common challenges and successes—such as challenges connecting across partner organizations

CQI meetings

- Share any common challenges or successes that emerge during WIG sessions with the CQI team
- Example: “Our staff are having difficulty reaching the right person at prospective partner organizations. How might we change our approach to address this challenge?”
- Confirm who will share new approaches with staff implementing strategies

WIG session agenda

1. **Review dashboard; learn from successes and failures**
2. **Report on prior week's commitments**
3. **Clear the path for new commitments**

Agenda item #1:
Review and analyze the dashboard

WIG session agenda

WIG session agenda			
When: 3/10/23			
WIG: Enroll 60 clients per quarter			
Dashboard update			
Individual reports	Team member	Individual commitments	Status
	Allon		
	Scott		
	Annie		
	Hannah		

Review: The importance of a compelling dashboard

- **Keeps the focus on your goal by displaying the most important measures**
- **Makes data accessible, which helps make it more actionable**
- **Helps the team to visualize the results of their efforts and celebrate progress**

Using dashboards in a WIG session

- **Analyze where the team is having success and where the team is falling short of expectations**
  - Where the team is succeeding, ask staff what helped them reach their goals
  - Where the team is falling short, what were the challenges? What is within their control to change, and where do they need support?
- **Celebrate progress on lead and lag measures**
- **Use this discussion to inform new commitments**

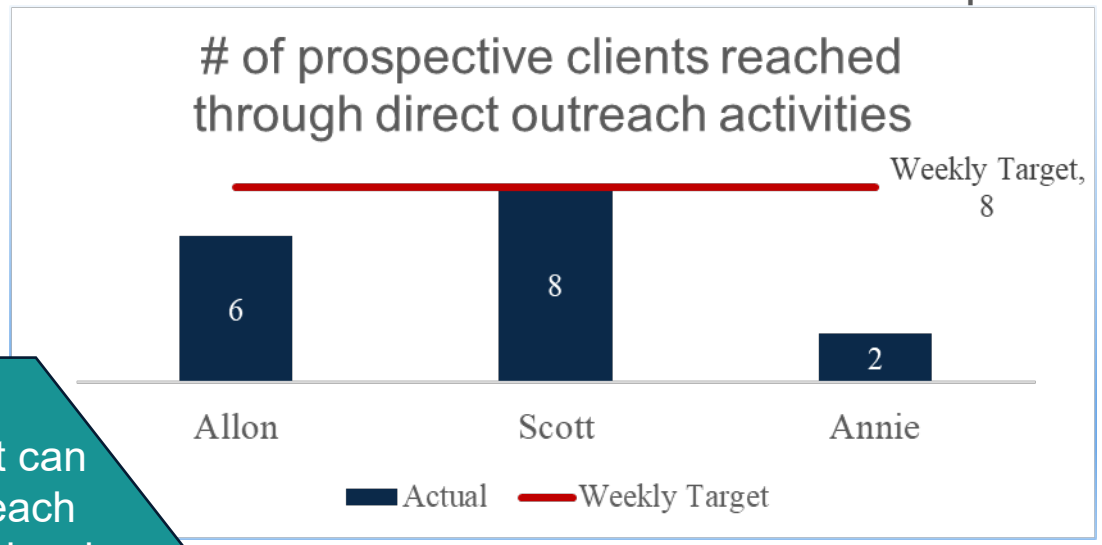
But we don’t have a dashboard yet!

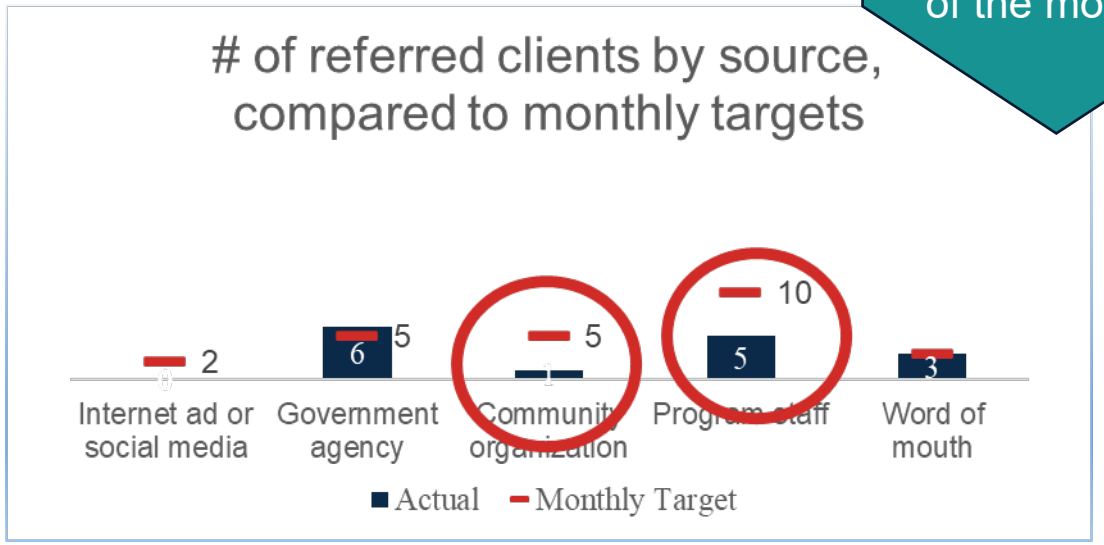
- **A dashboard that is regularly updated and accessible to staff is ideal**
- **If your team doesn’t have a dashboard (yet), consider other options for sharing measures**
  - Email a bulleted list of your lead and lag measures before each meeting
  - Share the list during WIG sessions to generate discussion

Reviewing the dashboard

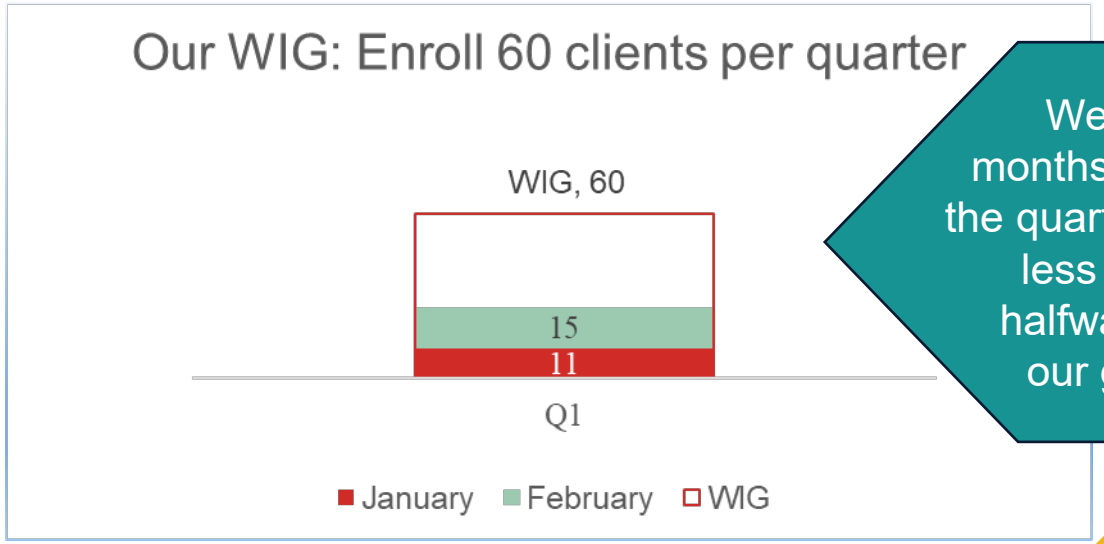
Updated 3/7/23

What sources do we need to level up for the second half of the month?





What can we each do to level up these sources?



We're 2 months into the quarter & less than halfway to our goal!

WIG agenda

WIG session agenda			
When: 3/10/23			
WIG: Enroll 60 clients per quarter			
Dashboard update	We're not even halfway to our goal yet this quarter and we have less than a month to go with holidays fast approaching. We need to level up referrals through direct outreach and partners.		
Individual reports	Team member	Individual commitments	Status
	Allon		
	Scott		
	Annie		
	Hannah		

Share with us

- **How do you review data with your team related to your WIG or SMART goals? Do you have any specific approaches to these discussions that you find work well?**

Agenda items #2 and 3: Reporting on and setting new commitments

WIG session agenda

WIG session agenda			
When: 11/10/22			
WIG: Increase our exit survey response rate from 72% to 88% by the end of spring (May 2023)			
Dashboard update			
Individual reports	Team member	Individual commitments	Status
	Allon		
	Scott		
	Annie		
	Hannah		

What makes a good commitment?

What can I do this week that will have the biggest impact on the WIG?

- Which one or two actions are achievable this week, and will influence lead measures?
- What obstacles might I encounter? What support will I need?

Recruitment example

- WIG: Increase enrollment from 12 young fathers (ages 18 to 24) per month to 20 per month by the end of quarter 3
- Lead measures: Number of outreach events attended; number of prospective young men reached
- Commitment: This week, I will identify at least one upcoming event that is likely to draw our target population

Tips for making WIG commitments

- **Do not assign commitments to others; they should be made by each individual**
  - Personal commitments are more meaningful; individuals will feel more accountable
- **Ensure commitments are concrete and directly relevant**
  - WIG commitment: *I will distribute flyers at five new locations that young men frequent.*
  - Whirlwind commitment: *I will catch up on documentation.*

Reporting on prior commitments

WIG session agenda			
When: 12/10/22			
WIG: Enroll 60 clients per quarter			
Dashboard update	We're not even halfway to our goal yet this quarter and we only have a month to go. We need to level up referrals through direct outreach and partners.		
Individual reports	**Team member**	**Last week's commitments**	**Result**
	Allon	Reach out to contact at least three new partners	I made calls to all three. Two seem very promising!
	Annie	Discuss program with 6 target business owners/managers and provide flyers.	I met with 4 local managers and handed out flyers to them + 3 other businesses; those managers were N/A.
	Scott	Attend the community health fair on Thursday	We've attended this event in the past. As usual, it was a great turnout
	Hannah	Make calls to check in on the three partners assigned to me	I called all three but only made contact with one. It's a busy time.

Tips for WIG session leader

/ Foster motivation

- WIG sessions should be energetic and collaborative
- Come up with a fun way to celebrate commitments, like group cheers

/ Model how to make and keep commitments towards the WIG

- Validate efforts on other tasks, but reinforce the importance of the WIG
- Find a way no matter what
- Ask for help
- Don’t let the whirlwind distract you

/ Explore barriers to unfulfilled commitments

- Ask the group who can help “clear the path”

/ Ask for a commitment to catch-up when needed

- “Can we count on you to fulfill your commitments from last week and the commitments you made for this week?”

Share with us

- **How do you help your teams make and keep commitments towards your WIG?**
- **How do you keep your team motivated to reach the WIG?**

Questions about 4DX?

- **Developing wildly important goals**
- **Developing a compelling dashboard**
- **WIG sessions**
- **How 4DX supports CQI efforts**

Announcements

- **Next office hours is February 28, 2-3 p.m. ET**
- **For more resources:**
  - The HMRF Grantee Resources site (https://hmrfgrantresources.info/continuous-quality-improvement) contains CQI template, instructions, office hours slides, tip sheets, and other CQI resources
- **Submit questions to hmrfcqi@mathematica-mpr.com**