

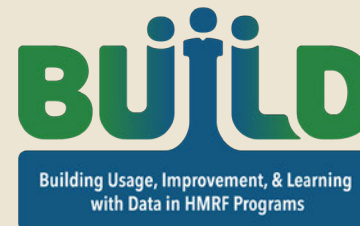
# Maintaining focus on your priority challenge

Continuous quality improvement (CQI) office hours

October 25, 2022 | 2:00 – 3:00pm ET



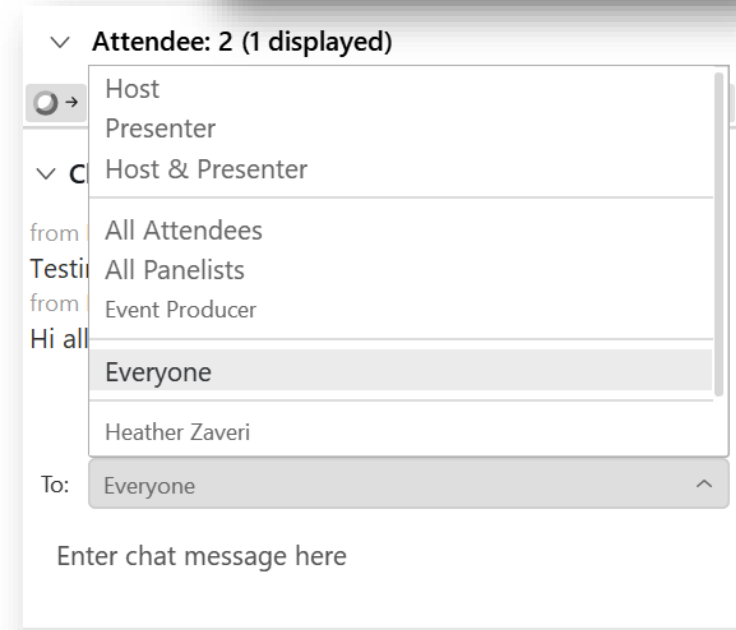
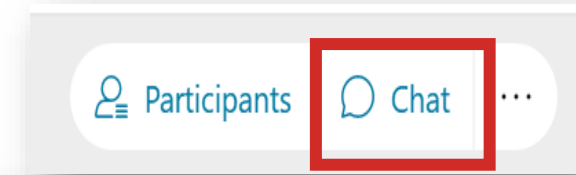
**OFFICE OF FAMILY ASSISTANCE**  
An Office of the Administration for Children & Families





# 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

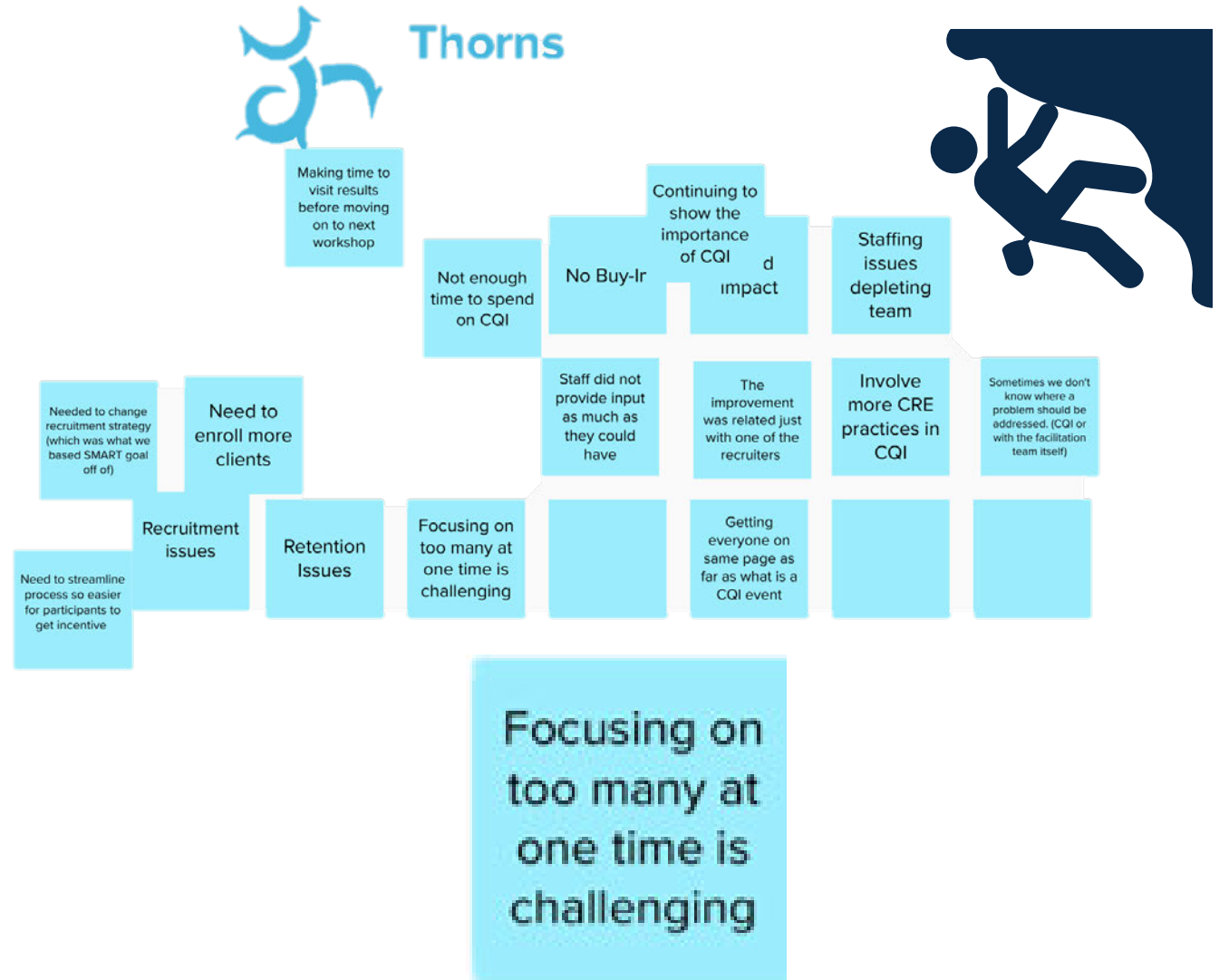
- / **Maintaining focus throughout a CQI cycle**
- / **4DX (Four Disciplines of Execution) as a framework for maintaining focus on CQI**



# Grant Year 3: Focusing on challenges

A common challenge:

/ Maintaining your CQI team's focus on one challenge at a time





**A disciplined focus on one challenge**





# Why focus on one challenge?

## / Why is it important to focus on one challenge at a time?

- To be able to determine what works and what doesn't
- To see a challenge through (don't abandon one effort when something else comes up)
- To prevent overtaxing the CQI team and/or staff responsible for implementing strategies
- Opportunity to rally staff around a common goal





# High-level challenge area versus your specific problem

**/ CQI efforts should be organized around a high-level challenge area**

**/ Specific CQI cycles will target specific problems, or root causes, to make progress on the challenge**

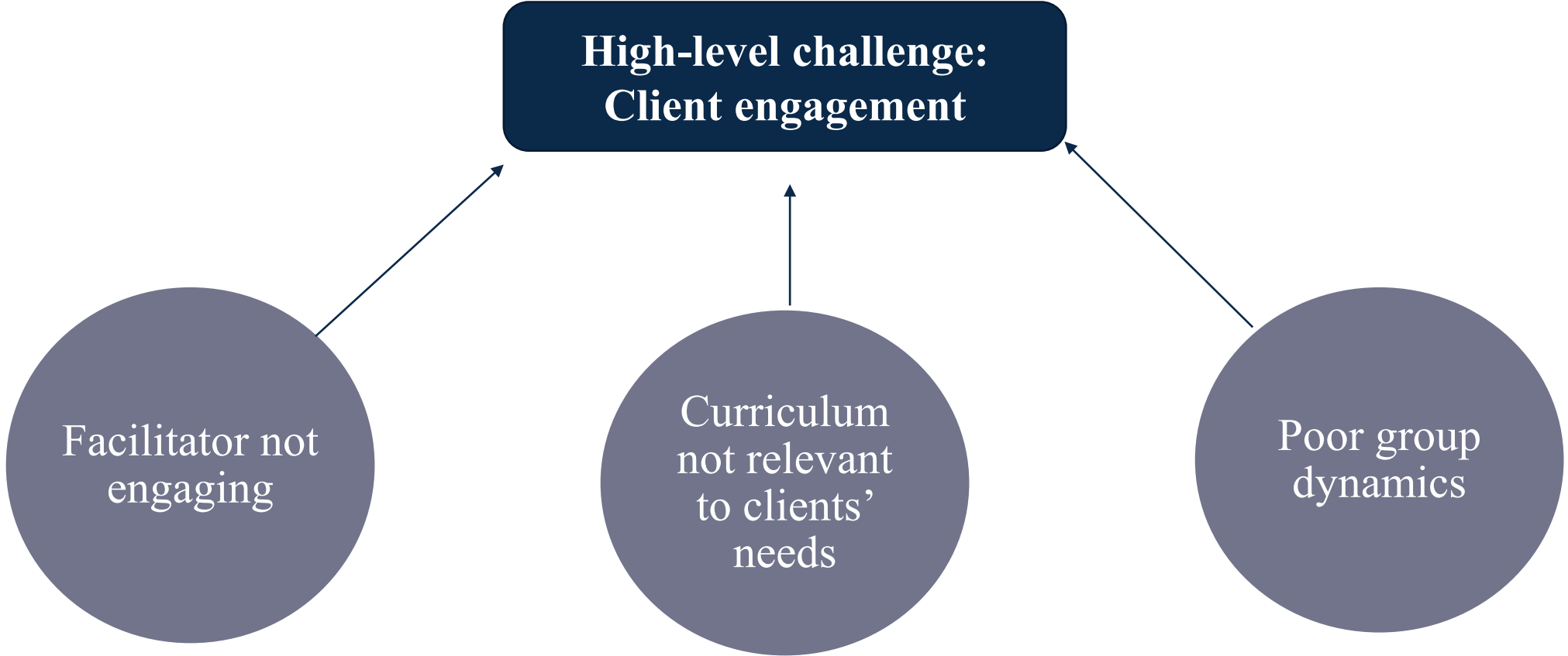
a. Please select one area of improvement for your program:

- Enrollment
- Client completion of services
- Quality of services
- Data collection
- Other \_\_\_\_\_

What is the specific problem or issue you are trying to solve?



# High-level challenge area versus your specific problem







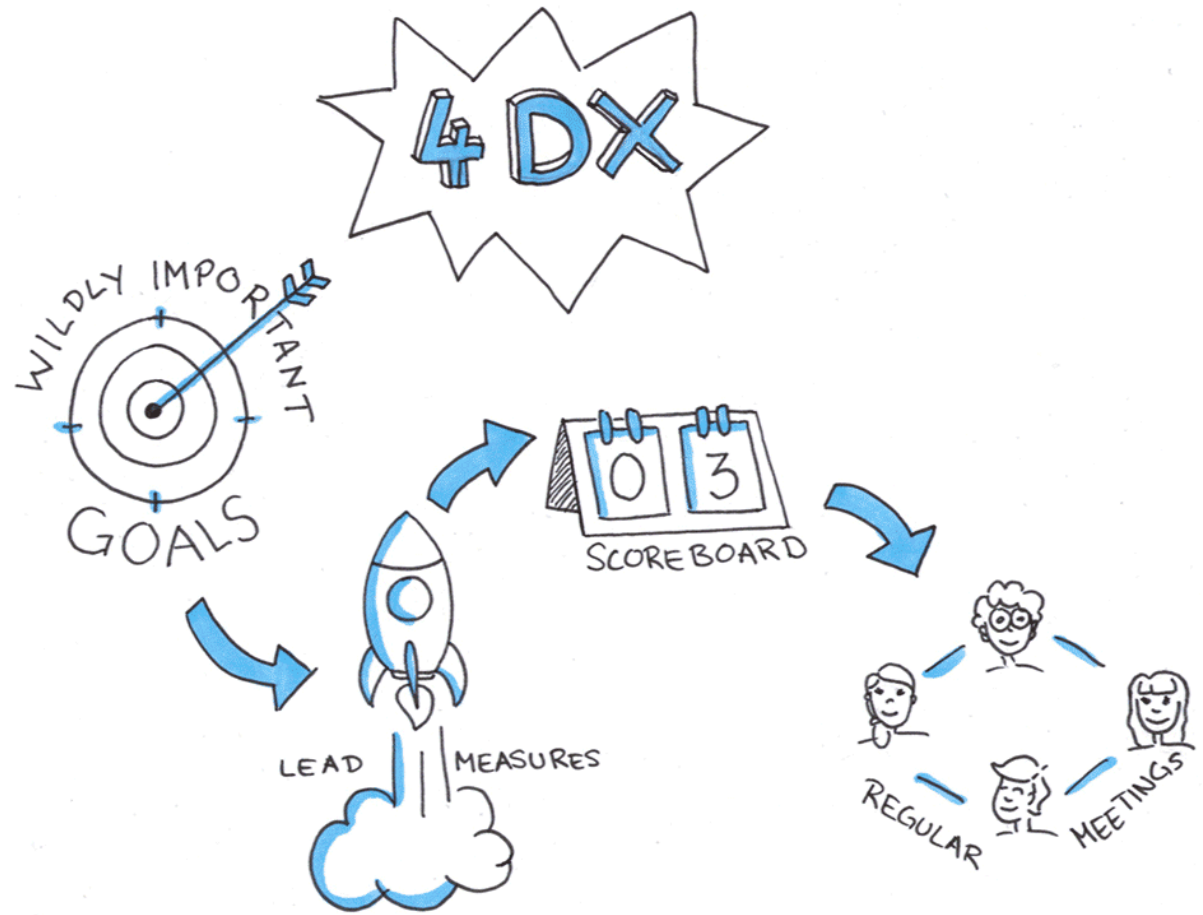
# **4DX: A framework for maintaining focus on CQI**





# 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



# Focus on the WIG

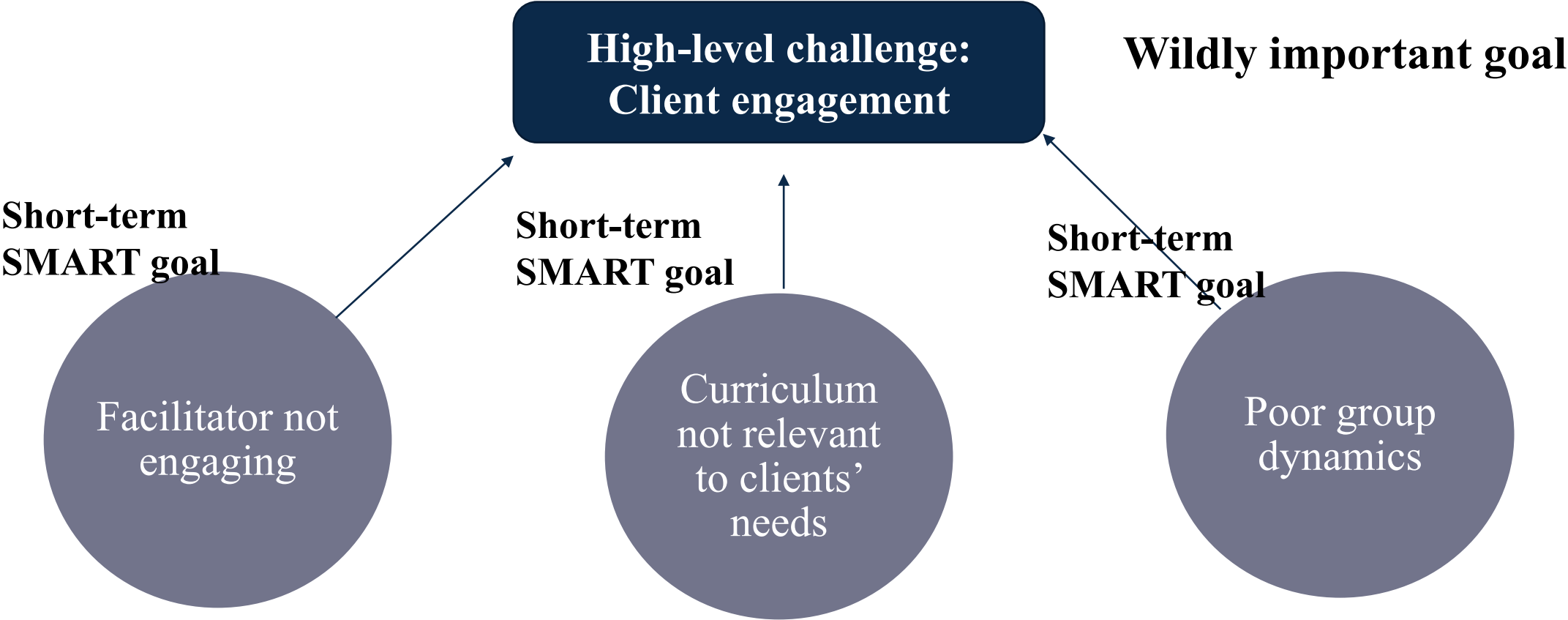
## What is a wildly important goal?

- / **A WIG is the most important thing we are trying to accomplish through CQI**
- / **It is motivating to our team**
  - Realistic to achieve **and** significant enough to generate enthusiasm
  - Known by staff across our program
- / **It is our primary SMART goal for CQI**
  - Specifies the extent of improvement we hope to see and by when
  - Example: At 8 months into the year, we are at 50 percent of our annual enrollment target. By the end of the year, we will meet our annual target.





# High-level challenge area versus your specific problem





# Focus on the WIG

## What is a wildly important goal?

- / **A WIG is the most important thing we are trying to accomplish through CQI**
- / **It is motivating to our team**
  - Realistic to achieve **and** significant enough to generate enthusiasm
  - Known by staff across our program
- / **It is our primary SMART goal for CQI**
  - Specifies the extent of improvement we hope to see and by when
  - Example: At 8 months into the year, we are at 50 percent of our annual enrollment target. By the end of the year, we will meet our annual target.





# Get everyone involved in your WIG

## / **WIG:**

- Currently, only 30% of youth we serve participate in case management. Our goal is to increase that percentage to 75% by the end of the grant year.

## / **Everyone has a role in progressing toward the WIG:**

- **Data manager:** Identify measures to track progress toward the goal and monitor implementation and outcomes
- **Case managers:** Conduct timely outreach to newly referred clients
- **Facilitators:** Actively promote case management option upon hearing about client needs during workshops
- **Leadership/supervisors:** Check in with staff to identify challenges and troubleshoot



# WIG for Montefiore's SHR: Collaboration



- / **What problems do we need to solve?**
  - Where is there room for improvement? What do we all agree on?
- / **Area of Agreement: Virtual Dis-Engagement**
- / **What are the causes of the problem of disengagement during workshops?**
  - Participant expectations, participant/staff technology challenges, curriculum format not Zoom/virtual-friendly
- / **All team members contribute solutions to address these causes to address ONE WILDLY IMPORTANT GOAL: Increased Virtual Engagement**
  - Participant HUB (data team)
  - Zoom training (workshop facilitators)
  - Curriculum overhaul (workshop facilitators)
  - Technology guidance for participants (program assistants)
  - Welcome Kit with virtual workshop expectations for participants (recruiters and intake specialists)





# Share with us

- / What is the WIG for your team?**
- / To what extent is your whole team contributing to the WIG?**





# Act on lead measures

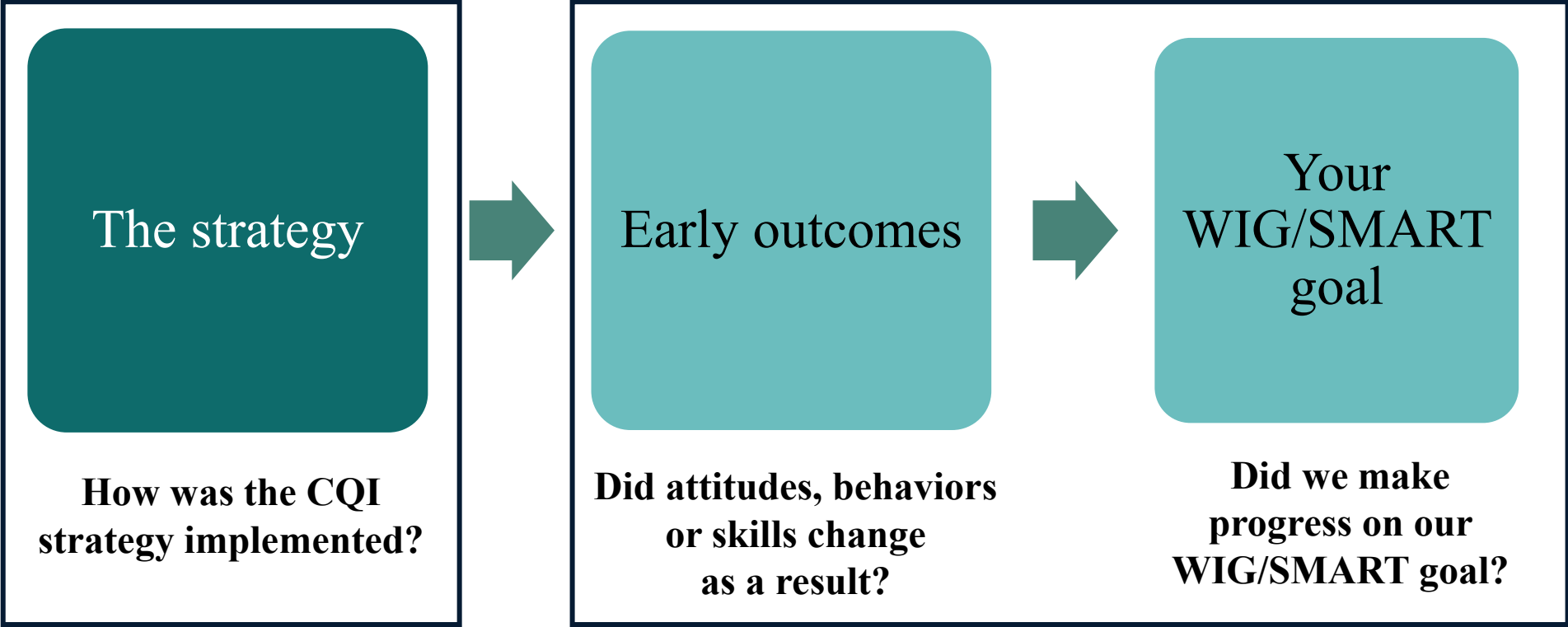
## What are lag and lead measures?

- / **A lag measure is the specific change you want to see. It is the quantified, time bound measure of your WIG.**
  - In your CQI template, your WIG is your SMART goal
  - Once your lag measure is set, define your lead measures. Determine the path to achieving your WIG and how to track progress along that path.
- / **A lead measure determines if you are on track with the strategy you designed to reach your WIG. Lead measures predict lag measures.**
  - Lead measures tend to be outputs (e.g., number of outreach attempts; number of successful contacts)
  - Useful for troubleshooting implementation issues as you go
  - Provide more information to make a final decision about the strategy





# How lead and lag measures align with your CQI strategy rationale

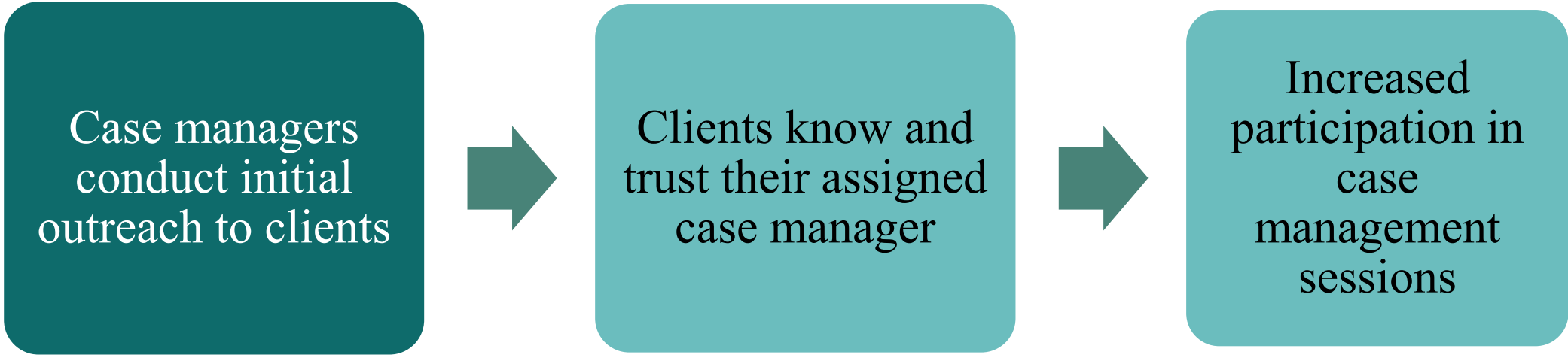


**Lead measures**

**Lag measures**



# Examples of lead and lag measures



## What did we do?

### Lead measures:

- % of clients receiving an outreach call one week prior to the class
- % of successful calls

## Does it seem promising?

### Short-term lag measures:

- Positive response on client intake exit ticket: “I know my case manager.” “My case manager is friendly.”

## Are we making progress on our WIG/SMART goal?

### Long-term lag measure:

- Rate of participation in case management



# Share with us

**/ What lead measures do you use, or can you use, to understand whether staff are on track with efforts to influence the WIG?**





# Keep a compelling dashboard

## 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**
- / **Tip: To ensure dashboards are accessible and informative, collaborate on dashboard design**





# Keep a compelling dashboard

## What makes a dashboard compelling?

- ✓ **It's for the whole team, not just leaders**
- ✓ **It's actionable—readers should be able to use the dashboard to inform next steps**
- ✓ **It's visually appealing, simple, and accessible**
- ✓ **It's informative, but not cluttered. Readers should be able to determine within 5 seconds whether the effort is on track**
- ✓ **It's updated regularly (e.g., weekly)**



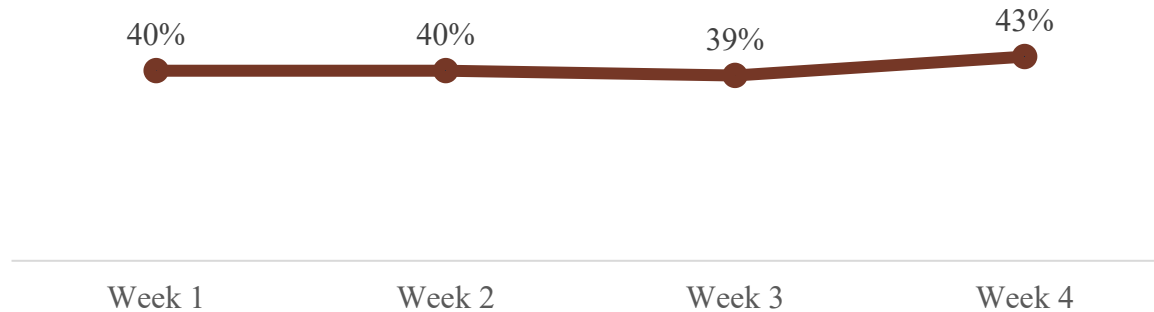


# Case manager strategy

**Strategy:** Have case managers conduct initial outreach to clients to form a relationship early

**Goal:** Increase the percentage of clients participating in case management from 40% to 65% by December 30

% of clients participating in case management



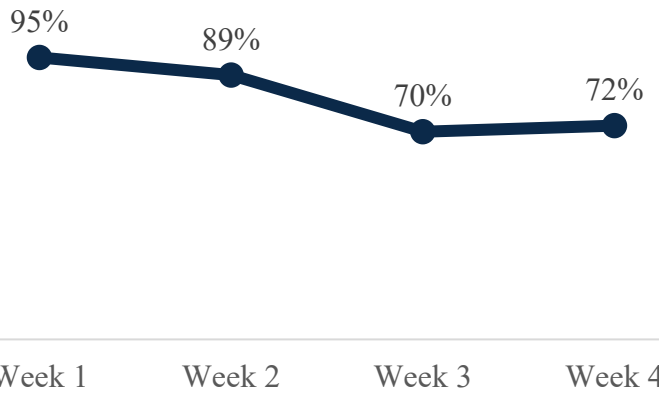
How could we make this dashboard more **actionable**? Readers should be able to use the dashboard to determine action steps.



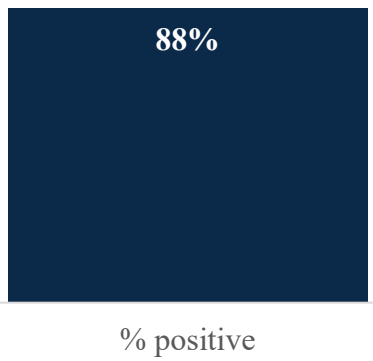


# Case manager strategy

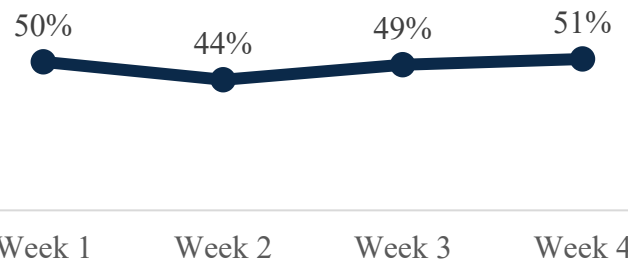
% of clients receiving outreach call at least one week prior



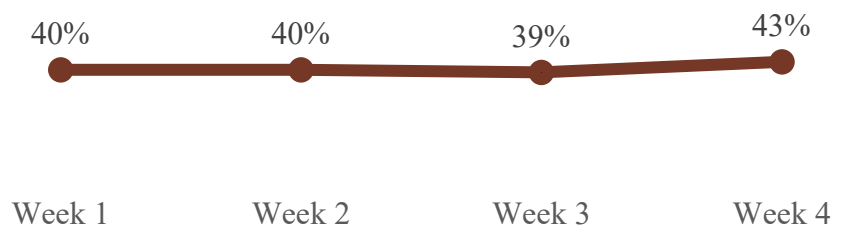
% of clients reporting strong relationship with case manager



% of calls that resulted in successful contact



% of clients participating in case management



How could we make this dashboard more **informative**? Readers should be able to determine in 5 seconds whether they are on track.



# Commit to a cadence of accountability

## Meeting and making commitments

### / **Hold short WIG sessions to check in on progress**

- These are meetings to report out on progress on tasks
- They should be short (20-30 minutes); consider huddles as needed (less than 15 minutes)
- Held at least weekly
- Include the people who are responsible for implementing the strategy

### / **Follow a structured session agenda**

- Account: Report on commitments from the prior meeting
- Review the dashboard: Discuss successes and failures
- Plan: Clear the path and make new commitments

### / **Make commitments at each meeting on specific action items to influence the lead measures**





Questions?



# Announcements

## / For more resources:

- Stay tuned for an upcoming office hours focused on developing effective dashboards
- The HMRF Grantee Resources site (<https://hmrfggrantresources.info/continuous-quality-improvement>) contains CQI template, instructions, office hours slides, tip sheets, and other CQI resources
- Reminder about a new resource: [Scaling and sustaining gains from CQI](#)
- For more on goals: [Guiding CQI with SMART goals](#)
- For more on team facilitation: [Facilitation strategies for fostering discussion](#)

/ **Submit questions to [hmrfcqi@mathematica-mpr.com](mailto:hmrfcqi@mathematica-mpr.com)**