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**
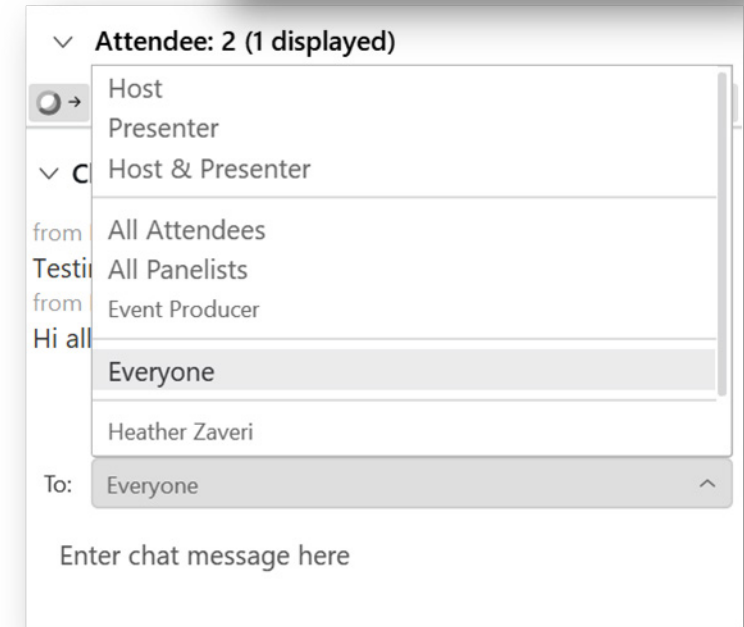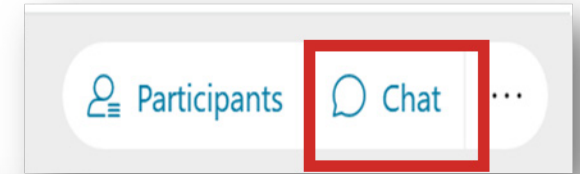
Today's agenda

/ **Review steps for transitioning an improvement strategy to a practice**

- Reflecting on learning

- Formalizing the strategy

- Planning to scale and sustain the change

/ **Gather suggestions for next month's CQI office hours**

Where are we in the CQI process?

We're here! D8: Communication

- 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)

Implementation team (Section B)
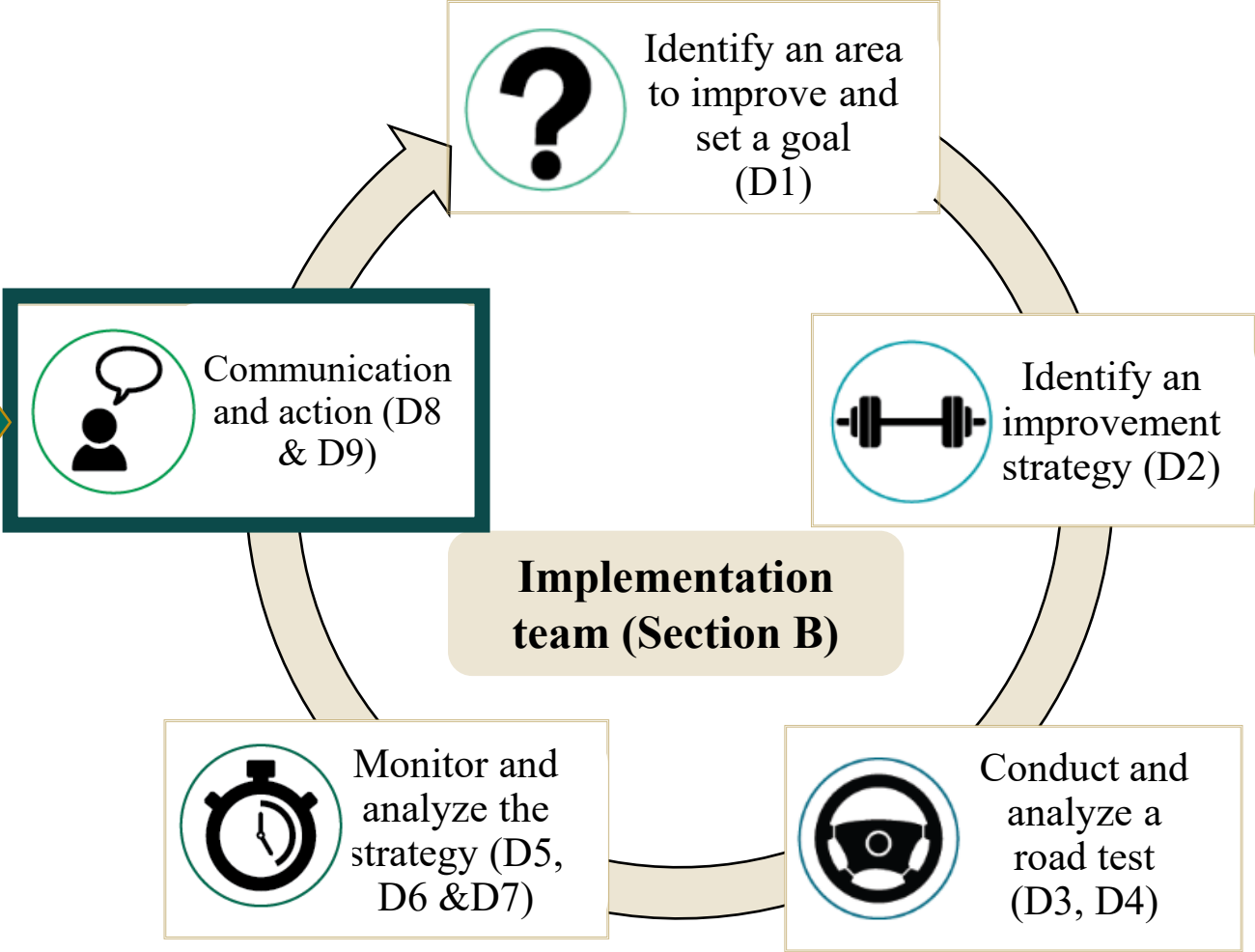
Checking in on progress

/ **Please use Menti link in the chat to let us know where you are in the CQI cycle**

- We have identified a challenge and are learning about it, but we have not conducted a road test

- We are planning our first road test

- We are currently conducting our first road test

- We have completed one road test

- We have completed multiple road tests

Supporting successful scaling and sustaining

/ **Reflect on what you learned**
- Think more deeply about what you learned from the road test and monitoring
- Take intuitive knowledge and make it shareable

/ **Formalize your strategy**
- Get specific about what it is, how to implement it, and what kinds of adaptations are allowable or not

/ **Develop a plan for scaling and sustaining the strategy**
- Who will take the lead on scaling the strategy? Who will communicate about the strategy?
- How will you ensure it becomes institutionalized as the new way of doing things?

Reflecting on learning

How to reflect on learning

Holding a reflection meeting

- Gather your CQI team to draw on a range of perspectives
- Remind the team why you originally started the improvement effort
- Bring data from your road test and the strategy monitoring phase
- Consider, on a high-level, what you learned about addressing your challenge

Consider what you learned

- About the root causes of your challenge
- About implementing your strategy during road testing
- About the success of your strategy during the monitoring stage

Useful questions to consider

/ **What did the team predict would happen as a result of implementing the strategy?**

- How accurate was that prediction? What unplanned developments happened?

/ **What went well? Why?**

/ **What could have gone better? Why?**

- What new questions emerged from the improvement effort?

/ **What, if any, assumptions were challenged or confirmed?**

Why reflection matters

/ **Take stock of what you learned to inform your plan for scaling and sustaining**

- The first step to successful scaling and sustaining of a strategy is to determine <u>what</u> to scale/sustain

- What about the strategy appears to support success?

- Some adaptation may be needed, so be sure to identify the essential elements of the strategy

Formalizing your strategy

Formalize your strategy

/ **Create a "guide" to implementing the strategy**

- What is the strategy?

- Why is it good practice?

- What does successful implementation look like?

/ **Developing a guide serves multiple purposes**

- It helps the team reflect on what it took to implement the strategy well

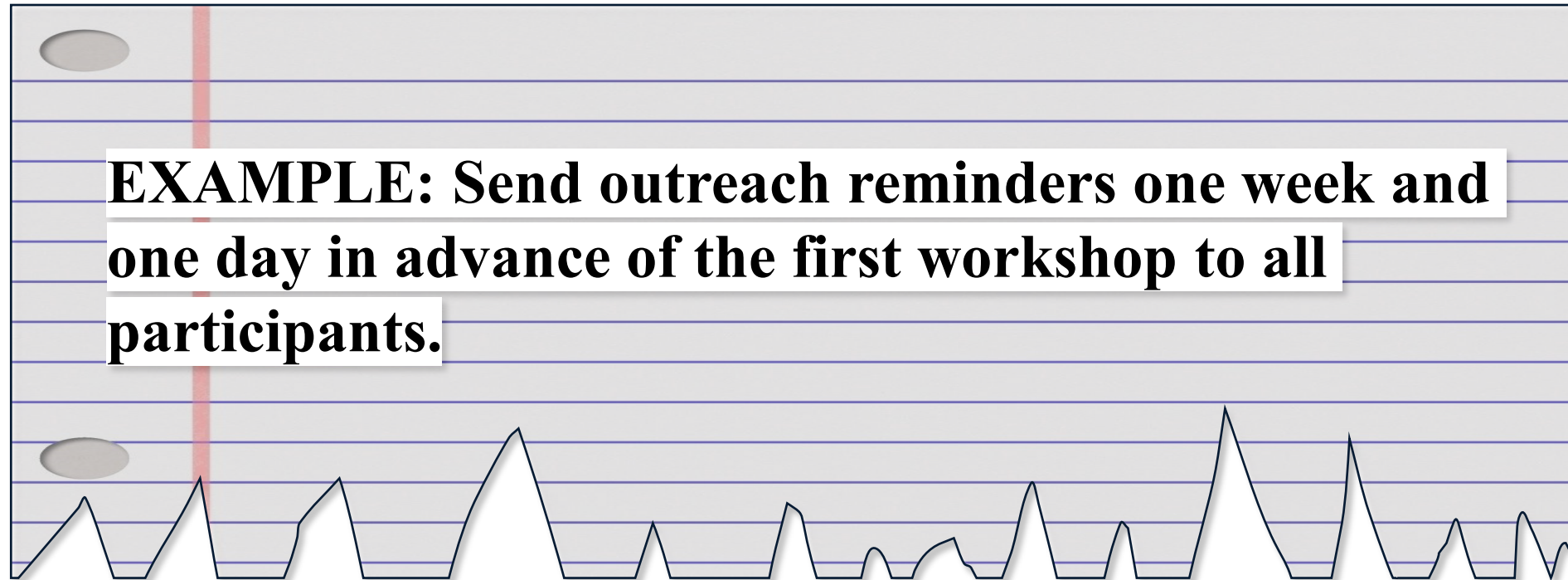- It serves as a tool for other staff who will be implementing the strategy

*Suggestions for how to formalize your strategy are informed by the REL Northeast CQI Toolkit

Formalizing your strategy

/ **What is the strategy?**

- Provide a succinct description of the strategy. What should people be doing differently?

EXAMPLE: Send outreach reminders one week and one day in advance of the first workshop to all participants.
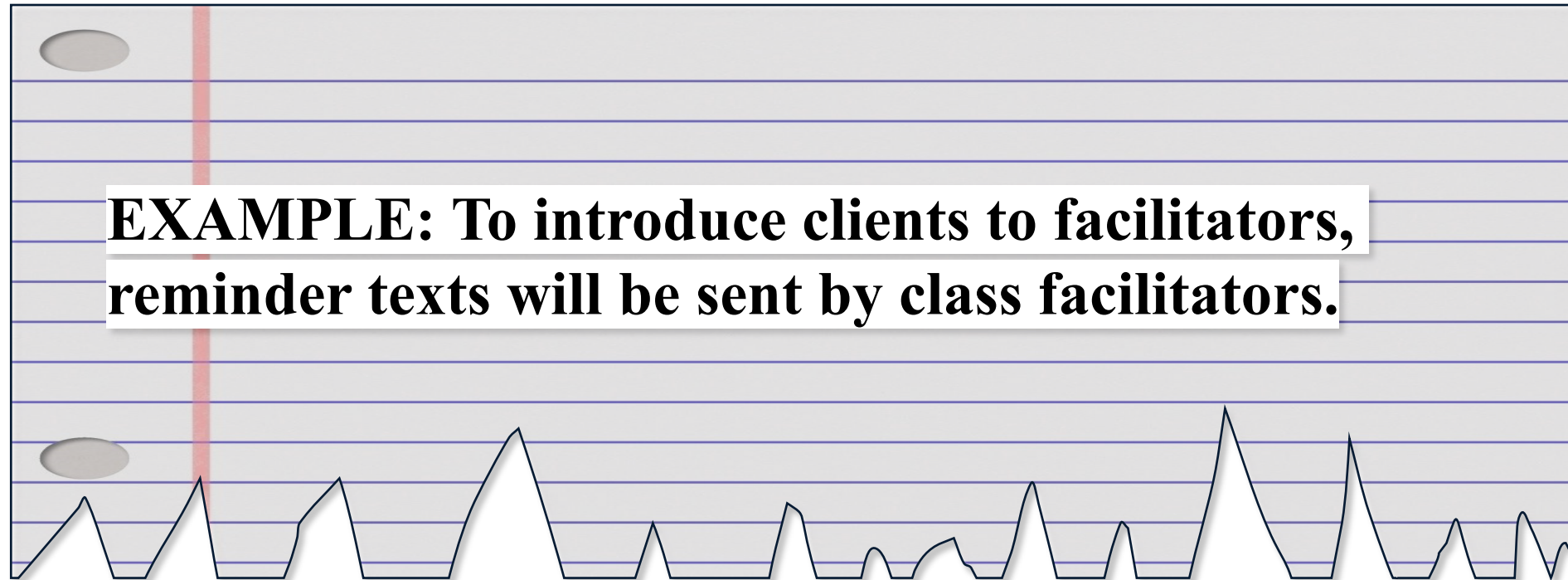
Formalizing your strategy

/ **Who is responsible for enacting the strategy?**

- Who is the audience? Who needs to know about how to implement the new practice?

EXAMPLE: To introduce clients to facilitators, reminder texts will be sent by class facilitators.

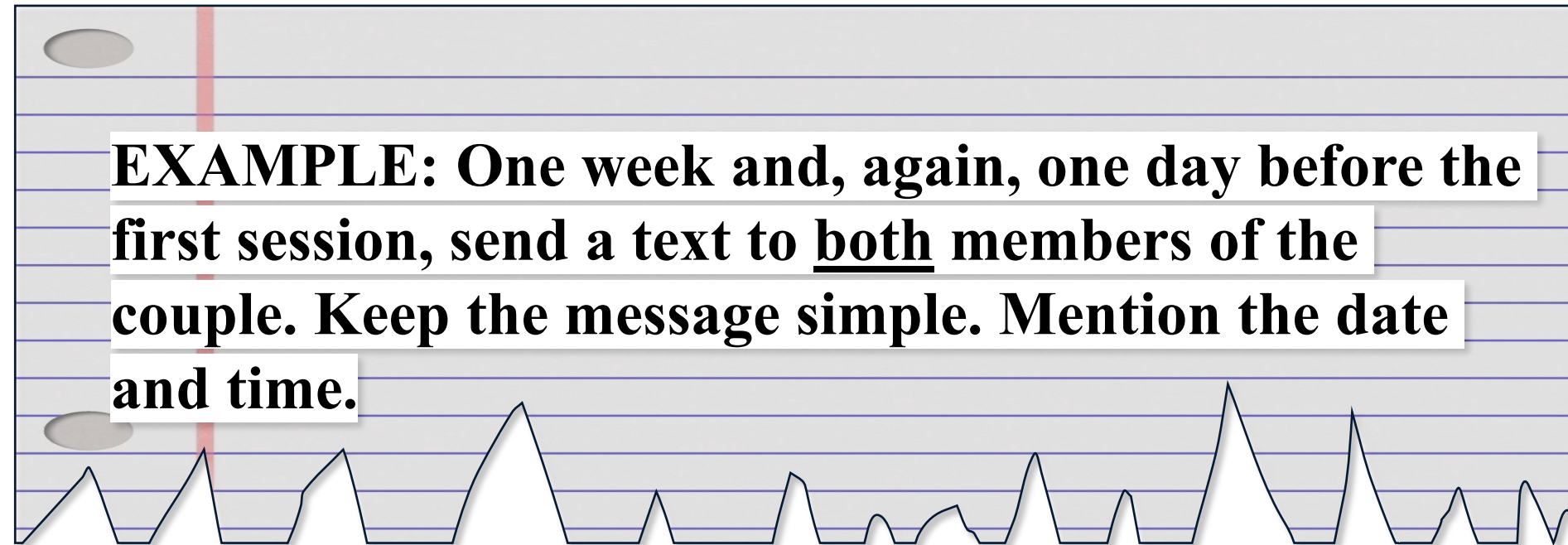# Formalizing your strategy

/ **What is the first (second, etc.) step? What does it look like? What should it not look like?**

- Break the change process into steps. Specify how to implement and unacceptable adaptations for each step.

EXAMPLE: One week and, again, one day before the first session, send a text to <u>both</u> members of the couple. Keep the message simple. Mention the date and time.

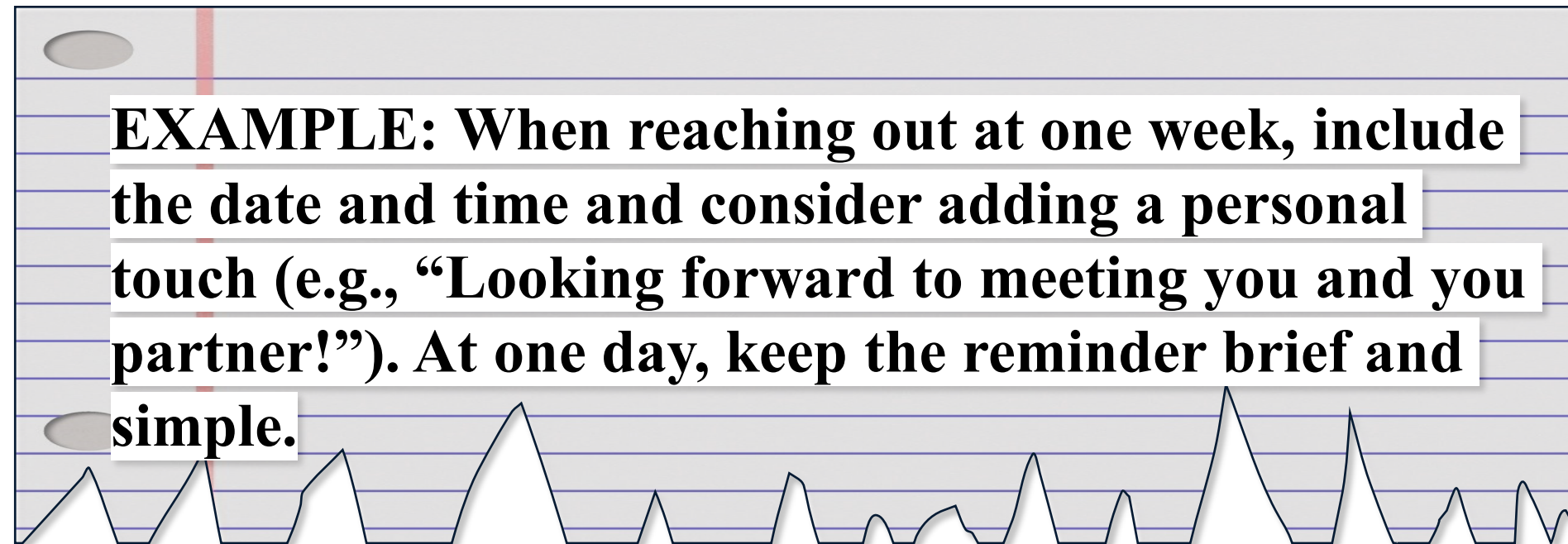# Formalizing your strategy

/ **What are tips for doing the improvement strategy that staff learned?**

- Note suggestions learned about what to do or what to avoid when using the strategy

EXAMPLE: When reaching out at one week, include the date and time and consider adding a personal touch (e.g., "Looking forward to meeting you and you partner!"). At one day, keep the reminder brief and simple.
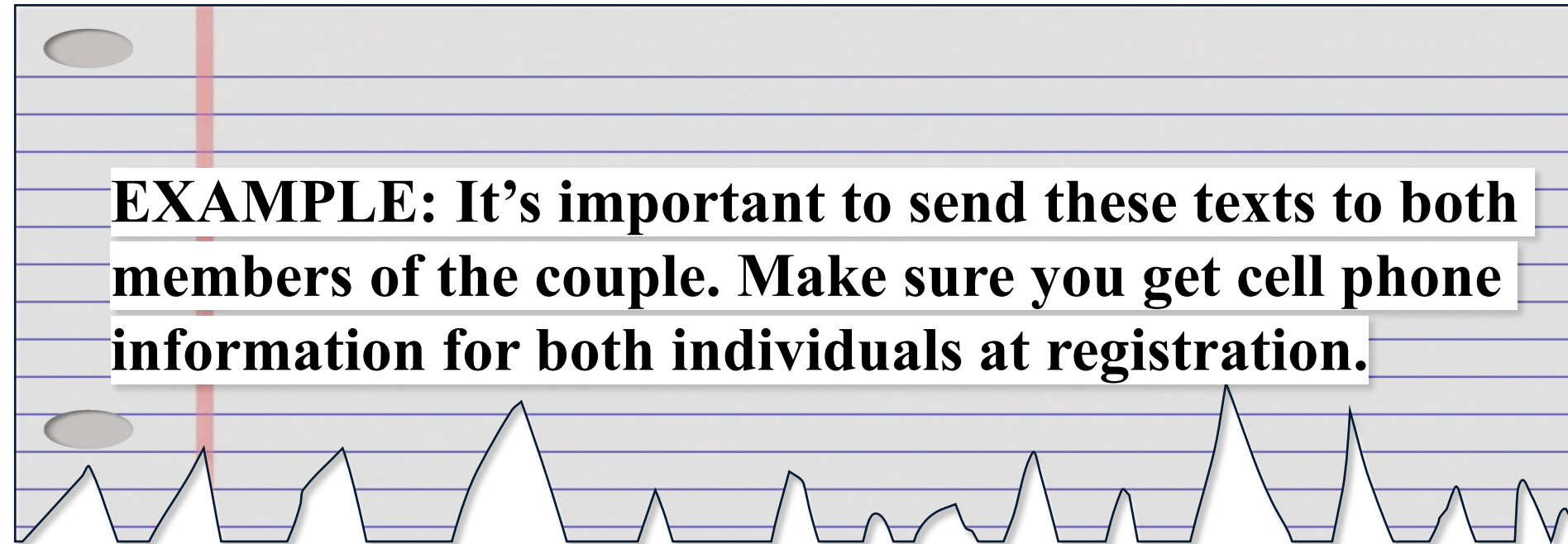
Formalizing your strategy

/ **What are potential challenges staff might experience? What are suggested solutions?**

- What challenges did staff who were involved with road testing experience and what recommendations do they have for getting ahead of these challenges?

EXAMPLE: It's important to send these texts to both members of the couple. Make sure you get cell phone information for both individuals at registration.

Planning for scaling and sustainability

Planning for scaling and sustainability

/ **What will you continue to measure?**

/ **Who will own the new work?**
- The idea is for the CQI team to transfer responsibility to the appropriate program staff

/ **How will the CQI team communicate about the new practice with program staff?**
- Who will be the messengers?
- How will staff be trained on the process for implementing the strategy?

/ **How can the program make it easy to do the right thing?**
- Make it easy to sustain the strategy by removing barriers and integrating the strategy into day-to-day routines

/ **Does undertaking this strategy add to staff workload?**
- How will the program address increased responsibilities?

Suggestions for planning for scaling and sustainability are informed by the Institute for Healthcare Improvement's Sustainability Planning Worksheet

Continued measurement

/ **How will you know you're sustaining gains? What will you continue to measure and what will you stop measuring?**

- Continuing to track your key outcome (progress toward SMART goal) is important
- Tracking process measures (E.g., whether staff are continuing to implement as expected) may be less important for the CQI team to do as you transfer responsibility for oversight to program leadership
  - o Coordinate with program leadership on who will take over this tracking

/ **Example: sending reminders before the first session**

- It may help to add <u>attendance at the first session</u> to the list of outcomes that are part of your routine program monitoring

Finding someone to own the work

/ **Who will oversee implementation of the new practice**

/ **Consider how to build buy-in with the group responsible for oversight**

Example: Text message strategy

Finding an owner: The CQI team will share results of road testing with program supervisors and task them with ensuring facilitators are consistently sending text messages to incoming clients at one week and one day prior to the session.

Example: Text message strategy

Building buy-in: The team will share data related to the challenge (the impact of missing the first session) and results from testing (how text messages supported attendance)
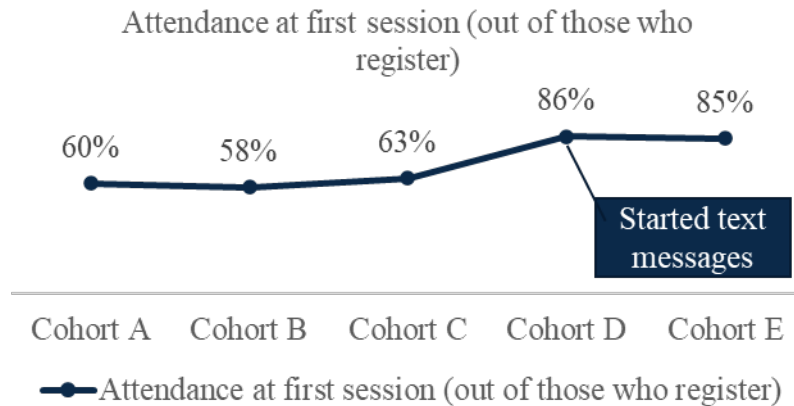
CQI storyboards: A tool for sharing results

Challenge: In this grant year, we noticed that 62% of clients who register for our couples program attended the first workshop session.

Why it matters: This was a concern, especially because attendance at the first session is critical for supporting sustained attendance. We saw that 88% of clients who attend the first session complete the course!

Strategy: Based on prior research, the CQI team decided to test a strategy to send simple text message reminders to both members of an incoming couple at one week and one day prior to the first session.

Results:

Attendance at first session (out of those who register)

60%   58%   63%   86%   85%

Started text messages

Cohort A   Cohort B   Cohort C   Cohort D   Cohort E

—●— Attendance at first session (out of those who register)

What clients said:
"I have a lot going on, so it was helpful to get a reminder about the class. We really wanted to go."

Communicating about the change

/ **Common barriers to buy-in include**

- Not understanding the need for change
- Impacts to current job role (e.g., the change requires more effort or time)
- Lack of leadership support for the change
- Skepticism resulting from past failed changes
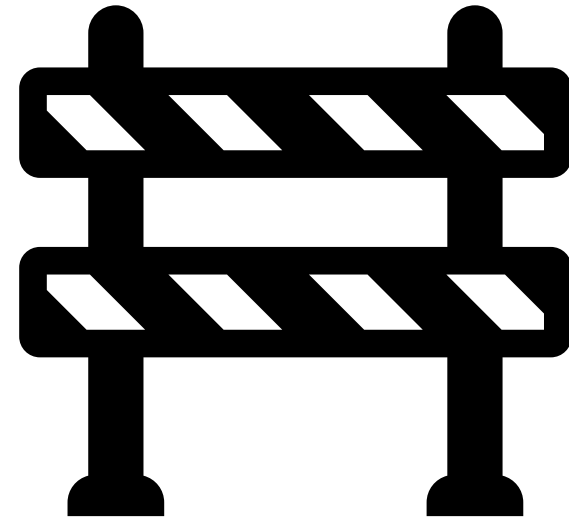
Communicating about the change

/ **Ways to generate support for the change**

- When first communicating, be clear on <u>why the change is being made</u> and what you learned about <u>how it supports improvement</u>
- Listen to concerns; make space for feedback
- Recruit "change champions" who were involved in testing and can speak to the benefits of the change
- Encourage leadership to support the change
- Share progress as implementation continues

Example: Text message strategy

Using change champions: Have facilitators who were involved with testing the text message strategy share the strategy with their peers. They may have more credibility and can share tips for implementation.
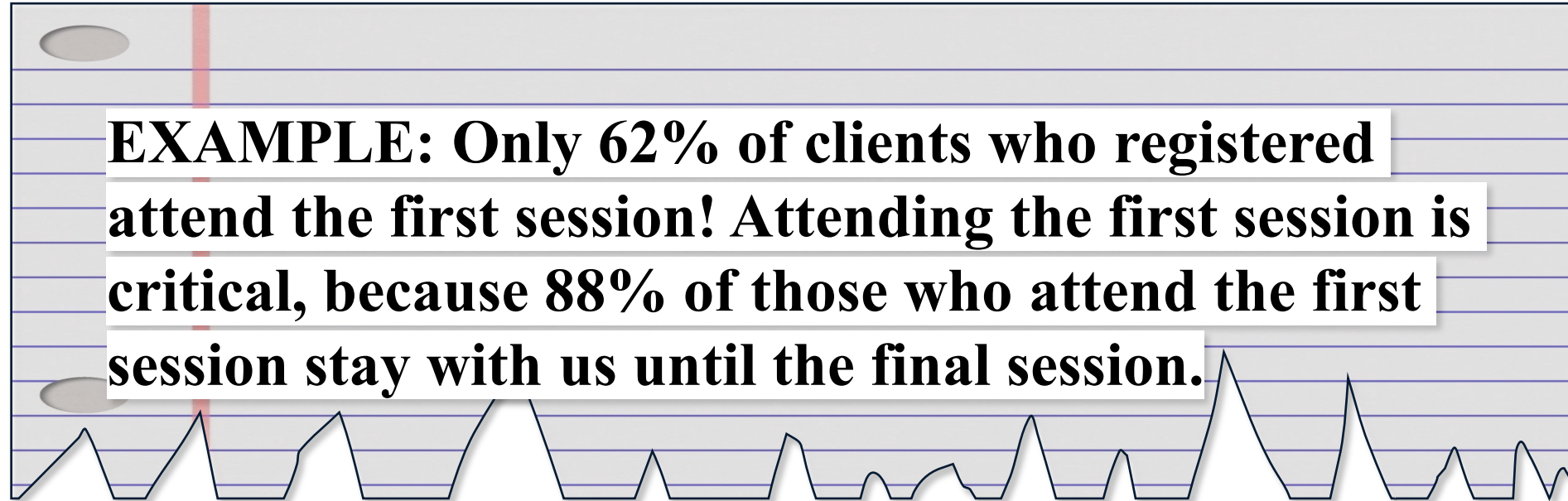
*Suggestions informed by "Holding the Gains: A Brief for Tribal Maternal Home Visiting Grantees"

Crafting your messaging – why the change is being made

/ What was your improvement goal?

- You don't need to restate your SMART goal, but be clear on what motivated the change

EXAMPLE: Only 62% of clients who registered attend the first session! Attending the first session is critical, because 88% of those who attend the first session stay with us until the final session.
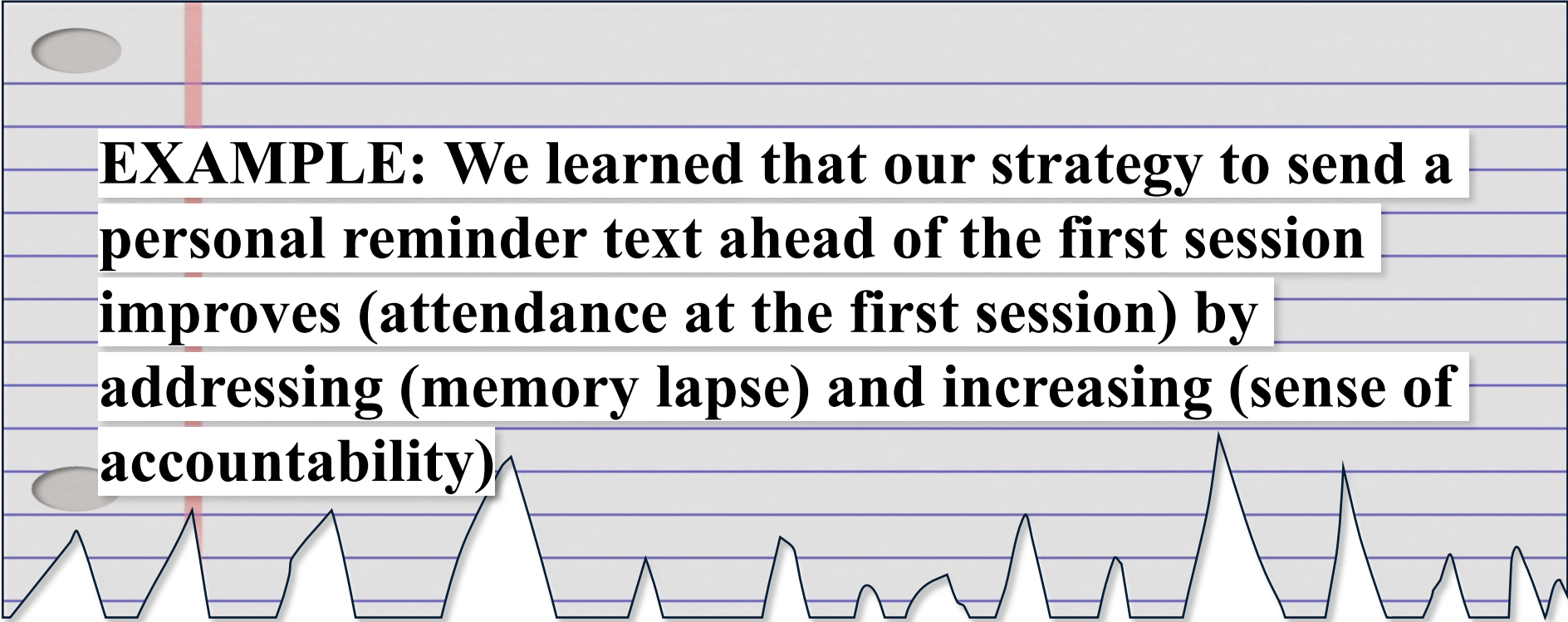
Communicating about the change – how it supports improvement

/ **What did you learn from testing?**

- We learned that our strategy improves (outcome) through (short-term outcome)

EXAMPLE: We learned that our strategy to send a personal reminder text ahead of the first session improves (attendance at the first session) by addressing (memory lapse) and increasing (sense of accountability)

Share with us!

/ **How have you generated support for changes after a CQI cycle?**

- How have you communicated with program staff about new practices?
- What challenges have you had in generating support?

Hardwiring change

/ **How can you make it easy to do the right thing?**

- Consider what needs to be changed in your program or organizational environment to support staff and prevent them from reverting back to the "old way" of doing things
- Don't rely on individuals to adopt the right behavior; adjust the environment to support the change
- For example, include new processes in employee onboarding trainings; update manuals, job descriptions, and workflows; update forms to reflect a new step in a process

Example: Text message strategy

Tying the practice to an existing process: We ensure facilitators remember to send texts by integrating the practice into an existing process. One week before a workshop starts, supervisors pull from nFORM a list of the clients registered for the workshop. We will now ask supervisors to send this list to the facilitators, with a prompt to send text reminders to the registered clients.

Making space for change

/ **If a change adds responsibilities or increases the workload of staff, how will the team address this barrier?**

/ **Options include:**

- Reducing other work responsibilities
- Making change processes more efficient

Example: **Text message strategy**

Addressing workload: As facilitators are required to send text messages to both members of the couple, they share that sending so many text messages is burdensome. To address this issue, we train facilitators on how to streamline the process of personalizing and sending groups of text messages.

What if the strategy didn't work?

Next steps after the team decides not to continue a strategy

/ **It's still important to reflect on learning**

- Hold a meeting with the CQI team and determine from whom else you need to gather feedback

/ **Reflect on**

- Goals: Were we aiming for the right things?

- Assumptions: How was our knowledge incomplete?

- Insights: When did we realize the strategy was not promising/feasible?

- Next steps: How does this inform our next steps?
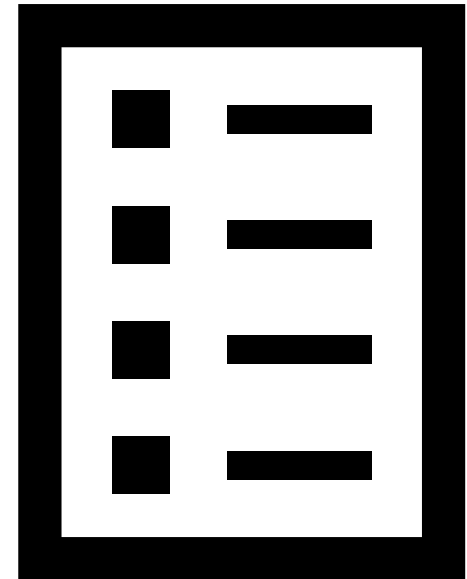
Planning for our August session

August office hours: Open session

/ **Share with us!**

- What parts of the CQI template or CQI cycle are you confused about or struggling with?
- Do you have questions for other grantee teams about strategies or testing experiences?

Announcements

/ **Look for a new sustainability planning resource based on today's session!**

/ **For more resources:**

- The newly-designed HMRF Grant Resources site (https://hmrfgrantresources.info/continuous-quality-improvement) contains CQI template, instructions, office hours slides, tip sheets, and other CQI resources

- Check out the new resource: Using a Synthesis Matrix

/ **Next office hours on Tuesday, August 23rd from 2-3pm ET**

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