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**
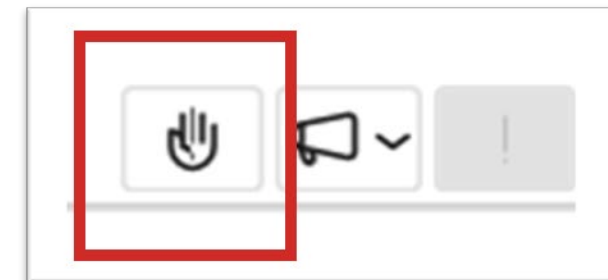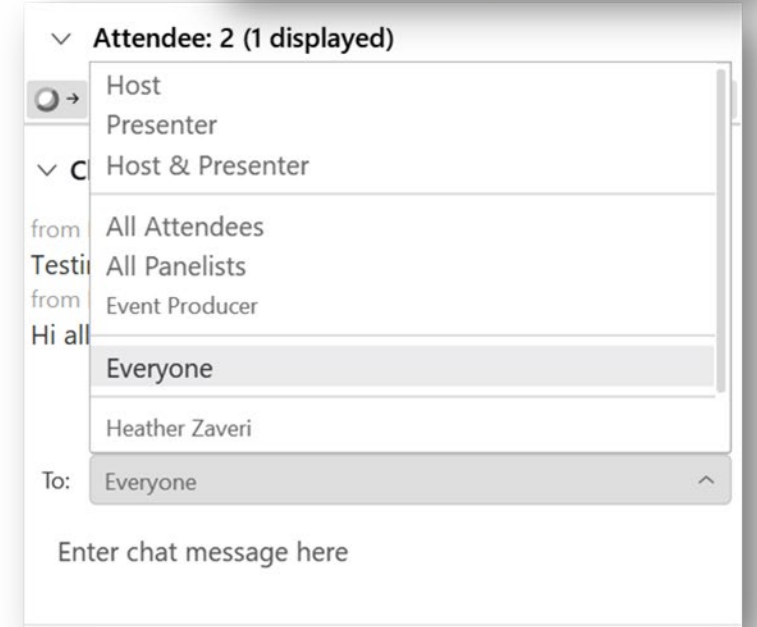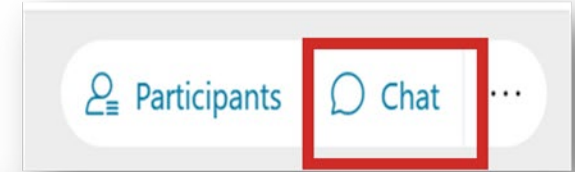
Focusing on your CQI challenges

A common CQI challenge:

Documenting CQI progress and maximizing the value of lessons learned

Today's agenda

/ **A worksheet to support planning and intentionality with CQI**

/ **Exploring the worksheet**

- How the worksheet relates to the CQI plan template

- Resources to use with the worksheet

- Reflection points to document insights

Introduction to the CQI plan worksheet

Benefits of the worksheet

/ **Organized like the full CQI plan template, but focuses on the most critical CQI questions**

/ **Offers space for reflection and links to helpful resources**

/ **Supports communication about CQI plans and progress**

- With your CQI team
- With your FPS

When to use the plan template or worksheet

/ **OFA's expectations for CQI plans**

- CQI plans are a living document to update as you advance through CQI steps
- CQI plans should be submitted at the beginning and end of each CQI cycle, and as agreed upon with your FPS
- Grantees should discuss timelines with their FPS based on their own CQI cycles; there is no universal deadline for submitting CQI plans in year 3

/ **Discuss the worksheet with your FPS**

- Consider using the worksheet to communicate about CQI plans and progress, if your FPS agrees it will convey enough information

What's different about the CQI worksheet?

/ **Links to resources to support your team**

- Engaging fully with CQI means participating in the processes behind each step

CQI Process

Step 1. Identify an area to improve

What is the specific problem or issue you are trying to solve? Click or tap here to enter text.

? **Need help drafting your problem statement?** This worksheet walks through how to draft a strong problem statement. Click here for additional resources.

What's different about the CQI worksheet?
(continued)

/ **Each step contains built-in reflection points**

- Helps ensure your team can build on insights that emerge throughout a CQI cycle

CQI Process

Step 1. Identify an area to improve

What is the specific problem or issue you are trying to solve? Click or tap here to enter text.

Need help drafting your problem statement? This worksheet walks through how to draft a strong problem statement. Click here for additional resources.

Document your insights: What insights or additional issues did your team identify while investigating the problem? For example, what root causes did your team identify? What should you consider for future CQI cycles?

Click or tap here to enter text.

Using the CQI worksheet for documentation: What to document?

Insights that emerge over the course of a cycle

- EXAMPLE: While working on a retention challenge, you discover that clients appear to drop off after the first workshop

Parking lot issues

- EXAMPLE: You're focused on improving recruitment numbers and you learn through client interviews that your enrollment process is too complicated

Notes about improving your CQI process

- EXAMPLE: We didn't loop other staff into the road test during this cycle, which made scaling the strategy very difficult. Next time, we need a communication plan.

Exploring the worksheet: Steps 1-3, Identify an area to improve and a strategy

Step 1: Identify and get specific about a challenge

/ **Key process: Learn about and define your challenge**

/ **Key process: Identify root causes to support targeted strategy development**

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Step 1: Resources to support your team

/ **Problem statement tip sheet**

- New resource on how to develop a thorough problem statement to set a strong foundation for your CQI effort
- Includes a worksheet for drafting your problem statement

/ **Strategy development tip sheet (root cause section)**

- First section of this resource provides tips for identifying root causes

What do I document in Step 1?

What did you learn about the challenge that is important to remember going forward?

- Drop-outs tend to happen after the first workshop

What other root causes did your team identify?

- Document them in the CQI worksheet or on a tool like a fishbone diagram, which maps your understanding of the challenge
- Most complex challenges are multifaceted and not resolved with one strategy

Step 2: Describe what success looks like

/ **Key process: Define what success looks like**

/ **Key process: Create a plan to measure progress**

Step 2. Describe what success looks like

What is the SMART goal that would show an improvement on this issue? Click or tap here to enter text.

What data source will you use to measure progress towards that goal? Click or tap here to enter text.

? **Need help developing a SMART goal?** Click here for guidance on how to make a strong SMART goal, and for help with determining your measurement strategy.

Step 2: Resource to support your team

/ **SMART goals tip sheet**

- An existing resource that covers considerations for developing a strong SMART goal
- Includes a template for drafting a SMART goal

What do I document in Step 2?

What did you learn about your baseline state while developing your SMART goal?

- And what factors did you consider when setting your desired state (your improvement goal)?

Reflect on your process for setting a goal. Do you feel the goal you set was achievable? Did it feel relevant to all staff?

- If not relevant, how can the team set goals that feel motivating and relevant to all staff who are affected by the challenge?

Step 3: Identify an improvement strategy

/ **Key process: Co-create a strategy**

/ **Key process: Think through the rationale for your strategy**

Step 3. Identify an improvement strategy

Describe your strategy   Click or tap here to enter text.

Describe your rationale for the strategy: Why might this strategy lead to improvements? Click or tap here to enter text.

Need help identifying a strategy? The strategy development tip sheet describes how to generate ideas. Click here for more resources on identifying strategies.

Document your insights: Use this space for important notes related to strategy development. For example, did your team develop other promising strategies (in addition to your priority strategy) that you might test later?

Click or tap here to enter text.

Step 3: Resource to support your team

/ **Strategy development tip sheet**

- An existing resource that covers the process of brainstorming strategies and specifying your rationale
- Includes useful human-centered design activities to support strategy development

What do I document in Step 3?

How did you inform the strategy?

- Note it here, so you remember what information sources contributed to the development process that led you to feel the strategy was promising

Was your process inclusive of all key voices?

- Did staff responsible for implementing the strategy have input? Was there a need to gather client input?

You might generate several ideas in a brainstorming session for improvement strategies

- Save unused ideas in case your first idea doesn't work as you expected and you come back to try a new strategy

Menti: Share with us (Step 3)

/ **What do you do with leftover (promising) strategies that you don't move forward with?**

- We don't generate multiple ideas; we come up with one and proceed with it

- We try them all at the same time!

- We write them down and come back to them later

- We don't save them once we've committed to another idea

Exploring the worksheet: Step 4, Road testing

Step 4: Create a road test plan

/ **Key process: Develop your learning questions**

/ **Key process: Detail your strategy implementation plan**

4. Conduct a road test

Create a road test plan and implement it

What are your learning questions for the road test? Click or tap here to enter text.

When and how will you implement the strategy? Consider staff responsible, training/tools needed, and key processes. Click or tap here to enter text.

What is your timeline for the road test? When will you start, collect feedback, and complete the road test? Click or tap here to enter text.

How will you collect feedback during the road test? *(Check all that apply)*

Staff feedback through:	Client feedback through:	Others' feedback:
☐ Questionnaire	☐ Questionnaire	*Please specify who and how*
☐ Focus group	☐ Focus group	
☐ Interview	☐ Interview	
☐ nFORM	☐ nFORM	
☐ HCD activity[1]	☐ HCD activity	
☐ Other *(please specify)*	☐ Other *(please specify)*	

Step 4: Resource to support your team

/ **Learning questions tip sheet**

- New resource to help your team develop strong learning questions to frame your road test

Step 4: Analyze the road test

/ **Key process: Reflect on road test information**

/ **Key process: Make an evidence-informed decision**

Once you're done, analyze road test results

Analyze the road test results: What worked well, what should change? Click or tap here to enter text.

Decide whether to revise, maintain, or abandon the strategy.

☐ Revise → Restart Step 4 and revise your plans for road testing the strategy.

☐ Maintain → Continue to Step 5 to implement the strategy and monitor over time.

☐ Abandon → Return to Step 3 to identify a new strategy to address the problem.

Need help analyzing road test results and deciding next steps? See the tip sheet for reflecting on your road test and the decision tree tip sheet for suggestions. Click here for more resources on planning, conducting, and analyzing results of a road test.

Document your insights: Use this space to note insights that emerged from the road test. Note any unanticipated or unrelated challenges that you should return to later.

Click or tap here to enter text.

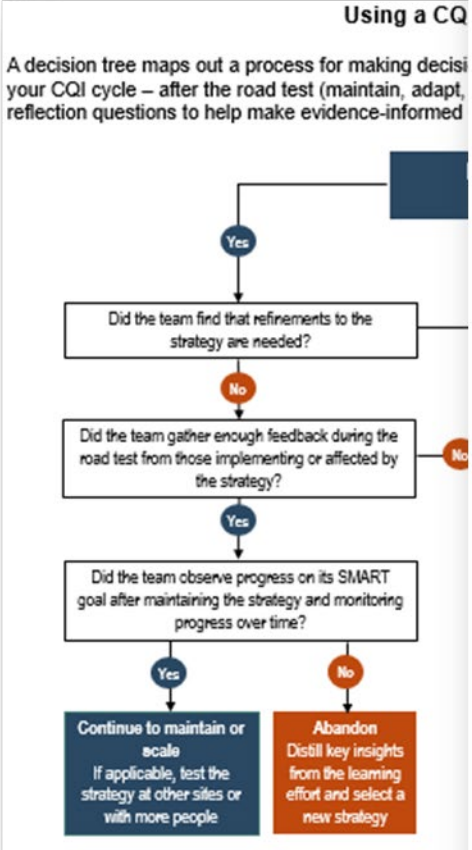# Step 4: Resources to support your team

/ **Learning questions tip sheet**

- Return to the learning questions tip sheet for guidance on reflection

/ **Decision tree tool**

- A tool to facilitate a nuanced reflection on the results of your road test to support evidence-informed decisions about next steps

What do I document for Step 4?

Road tests often produce many insights related to your challenge

- Even if your staff provides feedback in an ongoing way during testing, ensure you reflect on feedback and capture lessons learned at the end of the road test
- Note insights about what works, implementation challenges that get in the way, and solutions for overcoming challenges

Maintain focus on your current challenge; when other issues arise, document them on your worksheet

Reflect on how the road test went. Did you hear from everyone?

Menti: Share with us (Step 4)

/ **How well does your team document your CQI plans, progress, and lessons learned?**

Exploring the worksheet:
Step 5, Monitoring improvement

Step 5: Monitoring improvement over time

/ Key process: Develop a monitoring plan

5. Implement the strategy and monitor and analyze improvement

What is your implementation plan? Click or tap here to enter text.

How frequently will you monitor your strategy, and until what point? (e.g. "monthly for 3 months")
Click or tap here to enter text.

Who is responsible for monitoring progress? Click or tap here to enter text.

Did you make progress toward your SMART goal? Click or tap here to enter text.

Need additional resources? Click here for resources on monitoring progress.

Document your insights: Did this CQI effort change your ongoing program monitoring processes? For example, if you were not already monitoring your SMART goal, will you incorporate it into your routine monitoring process?

Click or tap here to enter text.

Step 5: Resource to support your team

/ **June 2022 CQI office hours session on monitoring**
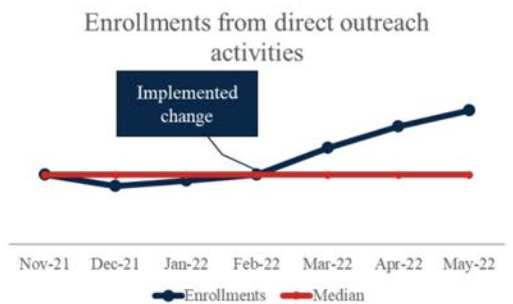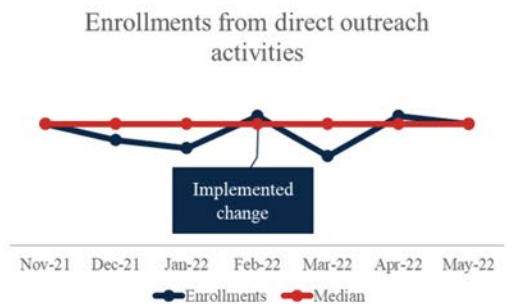
What do I document for Step 5?
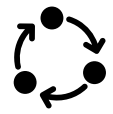
Reflect on your program monitoring. Do you need to change what you monitor in an ongoing way?

- Will you monitor progress on your SMART goal just for the duration of the cycle or add it to the list of metrics you keep tabs on?

Exploring the worksheet: Steps 6-7, Next steps

Steps 6-7: Communication and next steps

/ **Key process: Develop a communication plan**

/ **Key process: Plan for scaling and sustainability**

6. Interpret data and communicate results

With your CQI team, review your data and decide on key summary findings for each learning question you identified in Step 4. Also consider progress made on your SMART goal. Begin each statement with the phrase: *We learned that*…

- We learned that: Click or tap here to ente
- We learned that: Click or tap here to ente
- We learned that: Click or tap here to ente

Describe how the CQI team will communicat obtaining feedback on issues to address, infi Click or tap here to enter text.

? **Need help with your communicat** improvement efforts describes com Click here for other resources on int

7. Plan next steps

Consider next steps based on your findings in Step 6. If you do not see progress on your SMART goal, will you revise or abandon your strategy? If your strategy has not been implemented program-wide, will you scale-up the strategy, and if so, how and when? If you are not ready to scale-up, what next steps will your program take towards improvement? Click or tap here to enter text.

? **Need help deciding?** See the decision tree tip sheet, or click here for additional resources.

Document your insights: Use this space to note key insights related to your strategy and your decision whether to continue it, revise it, expand it, or abandon it.

Click or tap here to enter text.

Steps 6-7: Resources to support your team

/ **Scaling and sustainability tip sheet**

- An existing tip sheet that covers considerations for scaling and sustaining a strategy, including formalizing the strategy and making a plan to support sustainability

/ **Decision tree resource**

- Return to the decision tree to consider final steps after monitoring

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What do I document for Steps 6-7?

Reflect on the cycle. Note any final insights that emerged later in the cycle.

Did any lessons emerge about how to successfully scale strategies or ensure their sustainability long term?

- What might you do differently next time to ensure more success in scaling or sustaining your strategy?

Menti: Share with us (Steps 6-7)

/ **What is the most challenging part of CQI for your team?**

Announcements

/ **Next office hours is on May 23, 2-3pm ET**

/ **New date for June office hours! Tuesday, June 20 to accommodate regional roundtable schedule**

/ **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
  - o New tool: *CQI worksheet*
  - o New tip sheets:
    - *Developing a problem statement*
    - *Using a CQI decision tree to make evidence-informed decisions*
    - *Using learning questions to guide road testing and reflection*

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

Thank you!