

PROGRAM SPECIFICATION AND PERFORMANCE SUMMARIES: BUILDING THE FOUNDATION FOR THE USE OF MEANINGFUL DATA

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PRESENTATION OUTLINE

- I. Introduction
- II. Program Specification Process
 - a. Goals
 - b. Components
 - c. Logic Model and Evaluation Plan
 - d. Benefits and Challenges
- III. Program Performance Summary
 - a. Purpose
 - b. Template
 - c. Utility for Decision Making

LEARNING OBJECTIVES

1. Develop understanding of objectives and components of Program Specification process.
2. Outline components of a good logic model and collaborative CQI process to support meaningful outcome analysis and compliance with internal and external standards.
3. Provide template for summarizing Program Performance data to support the meaningful use of data for decision making.

I. INTRODUCTION

Jewish Child and Family Services (JCFS) of Chicago, IL

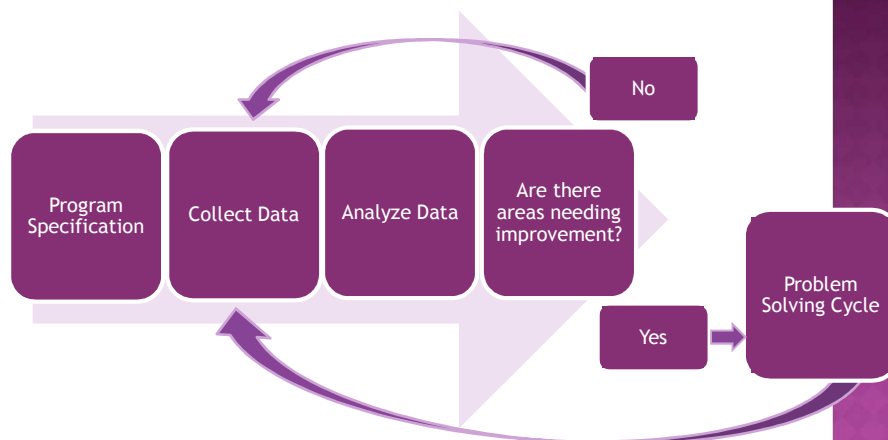
- ◉ 6 Primary Program Areas of Service
 1. Counseling and Support
 2. Support for Communities
 3. Education
 4. Child Welfare
 5. Services for People with Disabilities
 6. Employment Services (JVS Chicago)

THE CONTINUOUS QUALITY IMPROVEMENT (CQI) PROCESS

Striving Toward Excellence

- Brief history of CQI at JCFS
- Overview of JCFS CQI Process
- Overarching purpose:
 1. Provide answers to critical questions about programs/services
 2. Promote and sustain high quality and effective programming/services
- Program Specification as the foundation of the process

JCFS CQI PROCESS



II. PROGRAM SPECIFICATION

- ◉ What is Program Specification?
 - Foundation of the CQI process
 - Outlines goals and direction for each program and all aspects of program functioning
 - Have to know what we are doing, why, and how before we can measure how well we are doing it
- ◉ Who is involved?
 - Representative sample of program staff led by the CQI team
- ◉ When?
 - At the beginning of a program and renewed every 3-4 years

GOALS OF THE PROCESS

1. Clarify and understand:
 - Target population
 - Client and system conditions
 - Program activities
 - Expected client outcomes

GOALS OF THE PROCESS

2. Program Planning, Evaluation and CQI

- Meet expectations and standards for licensing, accreditation, and funding sources
- Identify evaluation questions and information needs
- Identify collection tools and processes
- Develop reporting format and process
- Develop program performance standards and annual program goals
- Provide road map for ongoing quality improvement and program evaluation process

GOALS OF THE PROCESS

3. Staff Development

- Reach consensus on program functioning with managers and staff
- Identify professional staff development and training needs

PROGRAM SPECIFICATION

- Results in:
 - Comprehensive, narrative description of the program
 - Logic Model used to guide:
 - Evaluation
 - Utilization/Case Review
 - Program Planning
 - Accreditation
- COA PQI 4.01: *A program specification model or logic model can be a useful tool to help staff think systematically about how the program can make a measureable difference. The models help to define the connection between the service population's needs, required resources, program activities and interventions, and program outputs / desired outcomes.*

SAMPLE OUTLINE FOR PROGRAM SPECIFICATION NARRATIVE HEADERS

- Introduction (brief description of program, history, and services provided)
- Program Model, Philosophy, and Theory of Change
- Population Served (problems, strengths, eligibility criteria, demographics)
- Referral Sources
- Funding and Contracts
- Service Delivery Context (gaps, partners)
- Inputs
- Activities
- Program Goal and Outcomes
- Logic Model and Evaluation Plan

LOGIC MODEL EXAMPLE

◉ Program Logic Model

Inputs	Activities	Outputs	Outcomes	
			Short Term	Long Term

HOW TO DO THIS AT YOUR AGENCY

◉ Time Commitment

- Dependent on # of participants in the room, scope of the program, familiarity with key concepts
- New Program: 6-9 hours over 2-3 meetings
- Renewal: 2-3 hours

◉ Staff Involvement

- Key representation of all staff roles
- Staff commitment to read and edit documents between meetings

◉ Facilitation

- Essential to gather reference materials in advance. Thorough review of documents will shorten duration of process.
- Facilitator and Note Taker
- Begin subsequent meetings by reviewing draft of previous content
- Use process to develop a learning agenda for the program for unanswered questions

PROGRAM SPECIFICATION GUIDE

DISCUSSION

- ◉ What are you doing today that is similar at your organization?
- ◉ Suggestions for additional questions or reference materials for each section?
- ◉ Anticipated challenges in trying to do this at your organization?
- ◉ Strategies for successful facilitation?

LOGIC MODEL DEVELOPMENT

PROGRAM LOGIC MODEL EXAMPLE - FOSTER CARE

Inputs	Activities	Outputs
Foster children	Intake, Screening, Assessment	# of Referrals # Admissions
Foster parents	Case Management	# of clients # of sessions
Program staff	Counseling	# of clients # of sessions
Funding		
Office Space	Family or sibling visits	# of visits
Foster Parent Training Curriculum	Discharge planning	# of discharges
	Aftercare services	# clients served

BRAINSTORMING OUTCOMES

- Imagine that our program has reached its highest level of success. What would our clients look like?
- What knowledge, attitudes, or behaviors would our clients exhibit if the program was successful?
- Are there any outcomes that we are contractually obligated to meet?
- What is our internal definition of success?
- What do we want to hold ourselves accountable for?
- Is there an expected time period for results?
- How many and what percent of clients are expected to achieve the results?
- What can be accomplished on the short term vs. the long term?
- What can we actually measure?

PROGRAM LOGIC MODEL EXAMPLE - FOSTER CARE

Inputs	Activities	Outputs	Outcomes		
			Initial	Intermediate	Long Term
Foster children	Intake, Screening, Assessment	# of Referrals # Admissions	Siblings are placed together	Reduce client needs	Achieve permanency
Foster parents	Case Management	# of clients # of sessions	Siblings participate in visitation with other siblings	Increase client strengths	
Program staff	Counseling	# of clients # of sessions	Youth participate in parent visitation		
Funding	Family or sibling visits	# of visits	Safe out-of-home placement for foster care youth		
Office Space	Discharge planning	# of discharges	Stable out-of-home placements for foster care youth		
Foster Parent Training Curriculum	Aftercare services	# clients served			

IS THE LOGIC MODEL SOUND?

- ◉ How are the activities connected to the identified needs and desired outcomes?
- ◉ Does the logic model represent: a) how the program really works? b) the agency's mission and values?
- ◉ How feasible is the program?
- ◉ Given available resources, is there a clear link between clients, program, environmental conditions and intended results?
- ◉ Does this program achieve the anticipated results?

TRANSLATING THE LOGIC MODEL INTO AN EVALUATION PLAN

- ◉ What data already exists?
 - Use this information to specify indicators and data sources/measures if possible
 - E.g., Treatment Plans, Progress Notes, Assessments, Existing Dashboards
- ◉ What if starting from scratch?
 - Look at research (how are other people doing it?)
 - Consider standardized assessments
 - Develop internal surveys or data collection tools
 - Build into standard practice
- ◉ Before you collect the data - know how you will analyze the data
 - What is "good enough" change?
- ◉ Establish appropriate benchmarks

EVALUATION PLAN EXAMPLE - FOSTER CARE

Outcome	Indicator	Data Source	Data Collection Method	Target
Stable out-of-home foster placements for foster care youth	# of placement moves # placement disruptions	Client Information System	All placement moves and placement disruptions in Client Information System	90% of youth served for 12 months or longer remain stable based on DCFS definition
Reduce needs	% of clients who experience reduction in percentage actionable needs from baseline to most recent	Child and Adolescent Needs and Strengths Assessment (CANS)	CANS completed at intake and every 6 months with the service planning (ACR) schedule, and again at case closure	60% of youth served from baseline/ highest need point to discharge
Achieve permanency	Placement disposition % of children ages birth to 5 at admission achieving permanency within 12 months	Discharge Summary	Discharge Summary completed in Client Information System	40%

LOGIC MODEL ACTIVITY

QUESTIONS:

- What are the strengths of this logic model?
- How can this logic model be improved?
- What common outcomes do you see across service types?
- Is it clear how the activities are connected to the desired outcomes?
- If you were in the Development or Grants Department, looking at this document, how could you communicate the impact of this program to a funder?

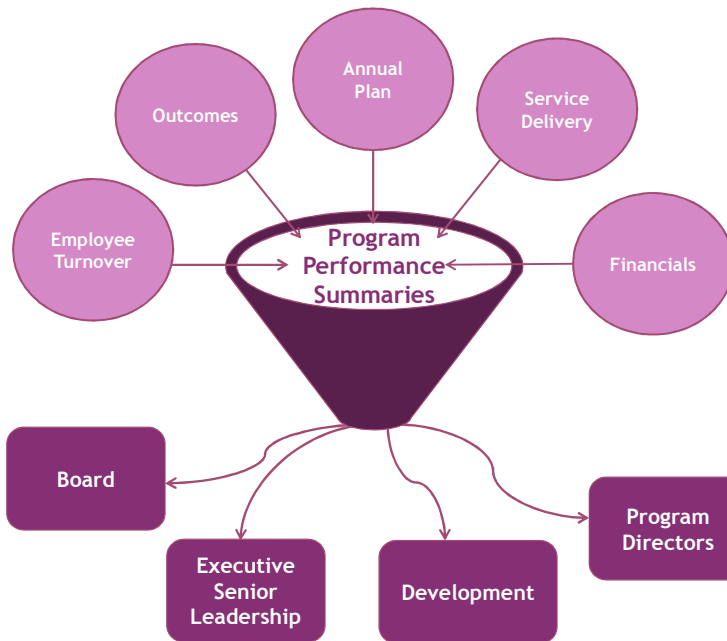
THERAPEUTIC DAY SCHOOL EVALUATION PLAN: KEY OUTCOMES

Outcome	Indicator	Data Source	Data Collection Method	Target
Improve or maintain adequate yearly attendance	# of students that maintain 90% attendance rate # of students that increase rate of attendance	Client Information System	Daily attendance recorded in Client Information System	90%
Improve academic skills	% of students who meet quarterly and year/annual IEP goals	Quarterly and Year End IEP Goal Evaluation	Teachers indicate goal progress and attainment in Client Information System	95%
Increase use of positive coping strategies for emotional and behavioral self-regulation	% of students who meet quarterly and year/annual IEP goals	Quarterly and Year End IEP Goal Evaluation	School Social Workers indicate goal progress and attainment in Client Information System	95%
Reintegration as appropriate	% of students who partially or fully reintegrate into a less restrictive setting	Discharge Summary	Discharge Summary completed in Client Information System	10%

III. PROGRAM PERFORMANCE SUMMARIES

Making Use of Data for Decision Making

What are the key pieces of information needed in order to demonstrate impact and to support organizational decision-making?



PROGRAM PERFORMANCE

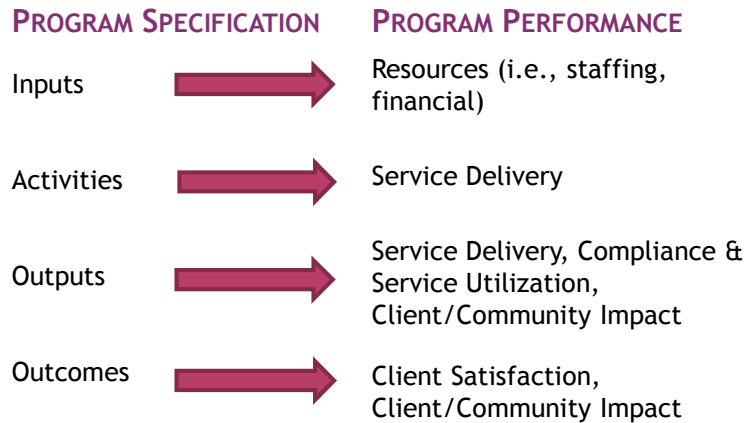
PROGRAM PERFORMANCE- TEMPLATE

- ◉ JCFS template
- ◉ Selected indicators of program functioning
 - Narrative Description
 - Program capacity, census, services, goals
 - Resources (staffing, facilities, equipment)
 - Successes and Challenges (from annual program plan)
 - Financials
 - Mission Fit and Financial Performance Index
 - Status on Program Goals

PROGRAM PERFORMANCE- TEMPLATE CONTINUED

- ◉ Scorecard
 - Service Delivery
 - Case Review Documentation Compliance
 - Client Satisfaction
 - Key Program Outcomes
 - Employee Turnover
 - Financials

MAKING THE CONNECTION BETWEEN PROGRAM SPECIFICATION & PROGRAM PERFORMANCE



PROGRAM PERFORMANCE SUMMARIES - BENEFITS

- ◉ Education and orientation to Board, Development, new managers
- ◉ Standardized report format across diverse array of programs
- ◉ Provide most important fiscal year data in one “scorecard” document
- ◉ Longitudinal comparison data
- ◉ Program specification process feeds into the outputs and outcomes presented in annual performance summaries

USING PROGRAM PERFORMANCE SUMMARIES FOR DECISION MAKING

- ◉ Communication tool between management and Board
 - Common base of most important information about each program
 - Informs conversation and important questions with objective data
- ◉ Importance of measuring and comparing what an organization does across program areas (i.e., for financial planning, regulatory reporting, accreditation)
- ◉ Intersection between program functioning, program planning and stakeholders

PROGRAM SPECIFICATION/PERFORMANCE AND ACCREDITATION - COA PQI STANDARD

Culture of Improvement

- ◉ The organization's leadership demonstrates a clear commitment to fostering a culture of excellence and continual improvement by:
 - a. using quality improvement results to build capacity and improve practice;
 - b. allocating resources for an organization-wide PQI system;
 - c. making data-informed decisions.

(PQI 1)

PROGRAM SPECIFICATION/PERFORMANCE AND ACCREDITATION - COA PQI STANDARD

Performance and Outcomes Measures

- ◉ The PQI system identifies measures to build organizational capacity, improve services, and meet contracting and reporting requirements...
- ◉ Staff throughout the organization and stakeholders work together to identify key outputs and outcomes...
- ◉ On an ongoing basis, each of the organization's programs measures client outcomes...

(PQI 4, PQI 4.01, PQI 4.02)

PROGRAM SPECIFICATION/PERFORMANCE AND ACCREDITATION - COA PQI STANDARD

- ◉ The organization collects and monitors data on management and operational performance to:
 - a. strengthen and build organizational capacity;
 - b. measure progress toward achieving its strategic goals and objectives;
 - c. evaluate operational functions that influence the capacity to deliver services; and
 - d. identify and mitigate risk.

(PQI 4.04)

REFLECTION ACTIVITY

- ◉ Thinking about your organizations:
 - Identify 2-3 challenges that your organization may face in implementing this process
 - Brainstorm 1-2 possible solutions
 - Other strategies you have found helpful to engage staff in evaluation planning and use data in the decision making process?



QUESTIONS?

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