

Measuring Transformational Change at an Organizational Level

Presenters:

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The Baby Fold

- * **Founded in 1902**
- * **3 campuses in Normal, satellite office in Springfield**
- * **200 employees**
- * **14 million budget**
- * **Residential treatment ages 5-13, 14 beds**
- * **HMR/Traditional/Specialized foster care**
- * **Healthy Start home visiting program**
- * **Adoption Preservation program**
- * **Elementary and Junior-Senior High school program**
- * **Autism program – 6 classrooms**
- * **Community Schools, County Outreach, and Intact**

Learning Objectives

- * Understand the concept of using a “transformational blueprint” as an agency-wide change strategy
- * How to develop outcomes and indicators to measure agency-wide change
- * How to develop and use tools to track progress towards change

“The secret of change is to focus all of your energy, not on fighting the old, but on building the new.”

-Socrates

Adapting to Change

* **Change Management**

- * Set of basic tools or structures
- * Keeps change effort under control
- * Minimize distractions and impacts of change

* **Change Leadership**

- * Driving forces, visionary, lead processes that push large-scale transformational change
 - * Sense of urgency and empowering large groups of people
 - * Bigger leaps associated with faster windows of opportunity
- * **70% of all major change initiatives fail**

Process of Organizational Change

- * **Began strategic planning process in Spring 2015**
- * **Identified three strategic directions:**
 - * **Building talent for today and leadership for tomorrow**
 - * **Building service capacity and reputation as experts**
 - * **Building visibility and partnerships for delivery on mission**
- * **Identified project teams:**
 - * **Creating new lines of business**
 - * **Improving fundraising and development methods**
 - * **Trauma informed practices and training**
 - * **Leadership development**
 - * **Space and facilities planning**
 - * **Communication and developing external partnerships**

Project Teams

- * Teams developed objectives, actions and timelines for each strategic project
- * New developing and marketing strategy developed in FY16
- * Space Planning project deferred due to cost
- * Continuing strategic plan projects in FY17:
 - * Trauma-informed treatment initiative
 - * Leadership development
 - * New lines of business – family centered/community based
 - * Internal/external communication

Alliance Strategic Change Initiative - What is it?

- * **Founded in 2010 by Tom Woll**
- * **Purpose was to help organizations adapt to rapidly changing environment**
- * **Based on extensive interview research**
- * **2300 interviews with private and public sector executives, families and youth receiving services, and elected public officials**
- * **Asked about current and future states of the field and future skills needed to be successful**

Strategic Planning based on future forecasting

- * Most strategic plans are based on current environment
- * Need a “future picture” of your field three years from now
- * Forecast the organizational change needed and skills to be developed
- * “Transformation Blueprint” is a method of planning based on future forecasting

Future Forecasting Trends

- * Financial resources only for services that “work”
- * Adaptable leadership that can both manage and lead change
- * Service delivery moves from child focus to family focus
- * Improved methods of family engagement and comprehensive assessment of family needs
- * Changes in residential treatment services
- * Move from campus based services to community based services
- * Further integrate and blend services
- * Form partnerships for collaboration and service continuum
- * Become trauma-informed experts

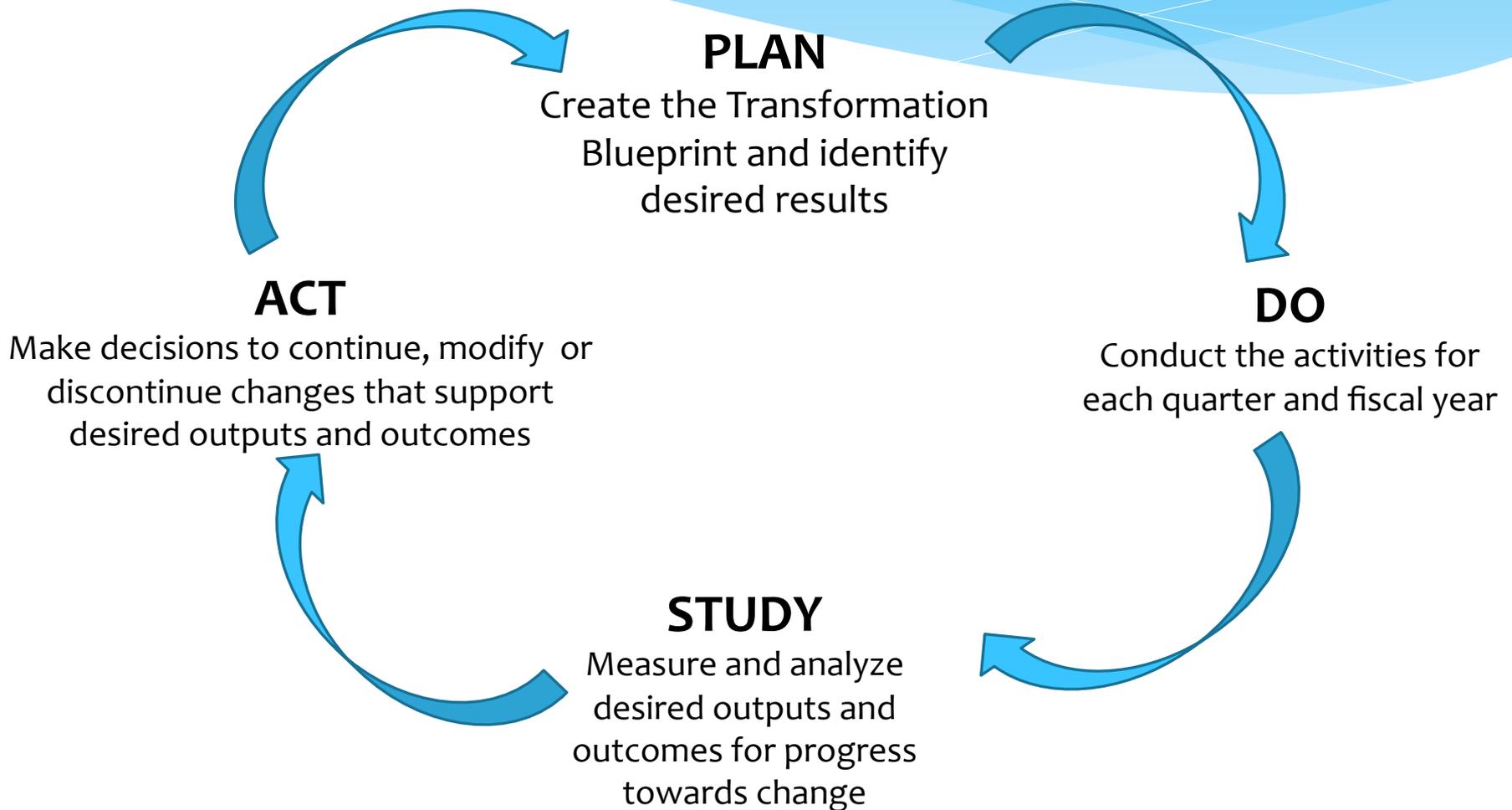
From Strategic Plan to Transformational Blueprint

- * **Joined the Alliance Transformation Cohort in January 2016 with Tom Woll, consultant**
- * **Consultation and training for 15 agencies across the U.S.**
- * **Three year change process based on future forecasting trends**
- * **Assist organizations in transforming into new business models due to changing environment**
- * **CEO partners with mentor agency CEO**
- * **Transformational Blueprint work would begin in July 2016**

Purpose of Transformation Blueprint

- * Method of responding to and adapting to changing environment and future forecasting
- * Provides a roadmap to guide organizational change
- * Clearly prioritizes changes needed
- * Defines direction of change to internal and external stakeholders
- * Drives the agency cultural shift

Continuous Improvement Cycle



Initiating the Blueprint

- * **Blueprint finalized May 1, 2016**
- * **Identified “themes” of trauma-informed, family focused, community based, and adaptive leadership**
- * **Introduced themes of Blueprint at all agency staff meetings and Board of Directors retreat in May 2016**
- * **Incorporated themes and expenses tied to Blueprint in Board budget presentation in June 2016**
- * **.5 FTE for development of new services; 1 FTE training; \$\$**
- * **Use of middle management as project leads**
- * **Drafted a “strategic map” for internal communication**

Strategy Map



DRAFT

We never
give up on
a child

Our Vision: Transforming children's lives through strong family and community partnerships.

Organizational Identity: (Adopt an organizational identity)

Trauma
informed
practice

Community and
home based
services

Empowering
and building
families

Develop and implement methods to enhance communication across the agency.

Research and identify methods to improve fundraising efforts

Develop and implement a plan to optimize use of physical resources and space

Improve child and
family outcomes
Improve staff
competencies
Decrease compassion
fatigue

Increase family engagement
Increase staff knowledge in
providing family and
community based services

Develop and deliver
leadership training
Develop and implement
reflective supervision
model

Provide training and
mentoring to develop a
workforce of trauma
experts

Enhance and expand the
family and community
based service components
for all programs

Foster adaptive
leaders who have clear
vision, high integrity
and inspire staff

Building service capacity
and reputation as experts
(Address child and family
trauma)

Building visibility and
partnerships for delivery on
Mission (Family and
community engagement)

Building talent for today
and leaders for
tomorrow (Leadership
and Supervision)

Strategic Plan: Our Windows of Opportunity

Foundation: Our Values - Respect, Integrity, Teamwork, Excellence, Stewardship and Diversity

Foundation: Our Mission - The Baby Fold embodies Christian principles to help families and children develop the hope, courage, and love they need to become whole and healthy.

Components of Transformation Blueprint

- * **Three year plan for organization change**
- * **Identifies three “driving force” goals**
- * **Specifies success measures (outcomes) for each “driving force” goal**
- * **Describes quarterly activities that will operationalize the goals**
- * **Identifies lead staff to drive the activity**
- * **Reports progress of activities**
- * **Identifies and measures outputs of activities**

Organization: The Baby Fold Year One: FY17

CEO Signature: _____

Driving Force Goal #2	Success Measure(s)	Quarterly Activities		Owner	Progress	Leading Indicators/ deliverables	
Address child and family trauma through the full organization adoption and integration of trauma-informed work that ensure that we do not re-traumatize or exacerbate the symptoms of trauma	<p>A comprehensive TRANSIT (trauma /attachment /neuro-science informed training) program is developed</p> <p>Outcomes Year 1: 100% of staff gain knowledge in beginning level TRANSIT principles</p> <p>Reduce the degree of compassion fatigue/secondary trauma for direct service staff based on pre/post measure</p>	Q1	Complete the literature review of evidence based/informed programs and trainings	Kathleen	Specify: Not a priority /no progress A little progress this quarter Some progress this quarter A lot of progress		
			Budget and hire a Training Coordinator			Training Coordinator is hired	
		Develop the "Training coordination and research team" that includes a training point person from each department	Training Coordination and Research team is established				
		Q2	Develop a trauma-informed agency assessment tool the measures degree of knowledge and incorporation of trauma-informed principles into service delivery and agency culture.	Keith			Assessment tool completed
		Q3	Disseminate the agency-wide assessment	Keith			Baseline measure of TRANSIT knowledge for all staff
			Complete analysis and discussion of results/next steps.				
Conduct focus groups to determine individual program needs for TRANSIT training and compassion fatigue and secondary trauma	Focus group results						
Analyze and review focus group results	Training Curriculum is developed						
Develop the beginning level TRANSIT training that will be used in NEO.	# staff trained/training sessions held						
Train the agency on the beginning level TRANSIT and incorporate into New Employee Orientation	# NEO sessions/participants						

Developing the Transformation Blueprint – Driving Force Goals

- * **Identification of Driving Force goals**
 - * Reviewed 10 statements of what future success looks like
 - * Leadership prioritized three statements
 - * Alignment with current strategic plan
 - * Input from agency-wide cross-departmental teams
 - * Included key leaders, all supervisors, and direct service staff representatives

Driving Force Goals

- * Adopt an organizational identity that understands that to best provide for the permanency and well-being of children and youth, we need to work equally as hard to strengthen families and communities.**
- * Address child and family trauma through the full organization adoption and integration of trauma-informed work that ensure that we do not re-traumatize or exacerbate the symptoms of trauma.**
- * Foster adaptive leadership that sets a clear vision that inspires and encourages our workforce and maintains high integrity. The adaptive leader ensures the creation of strategies systems, and methods for performance excellence while encouraging others to embrace possibilities and break through barriers to deliver creative solutions.**

Key questions to refining a Transformational Blueprint

- * What do we provide today that we may not in the future? How will that impact us?
- * What do we not provide today that we must in the future? Why?
- * How will our business model need to change to get the results that we want?
- * How will our behavior change in providing services?
- * What internal policies, practices and procedures need to shift to get the results that we want?
- * How will we ensure that we are continuing to evolve and transform our organization in the future?

Develop Annual Success Measures

Driving force goal: Address child and family trauma through the full organization adoption and integration of trauma informed work that ensures we do not re-traumatize or exacerbate the symptoms of trauma.

- * FY17**

- * 100% of staff gain knowledge in beginning level TRANSIT principles**
- * Reduce the degree of compassion fatigue/ secondary trauma for direct service staff**

Developing the Transformation Blueprint – Quarterly Activities

- * Quarterly activities should move you in a step by step method towards your defined success measure
- * Provides a system & process for setting priorities and ensuring that everyone is working toward common goals
- * Provides strategic performance feedback to decision making
- * Enables the plan to evolve and grow as requirements and other circumstances change

Developing the Transformation Blueprint – Quarterly Activities

- * **Identification of Quarterly Activities**
 - * **Mid-level managers identified as project leads**
 - * **Leadership Team member as project coach**
 - * **Teams formed from staff at all levels**
 - * **Brainstormed activities leading to change desired**

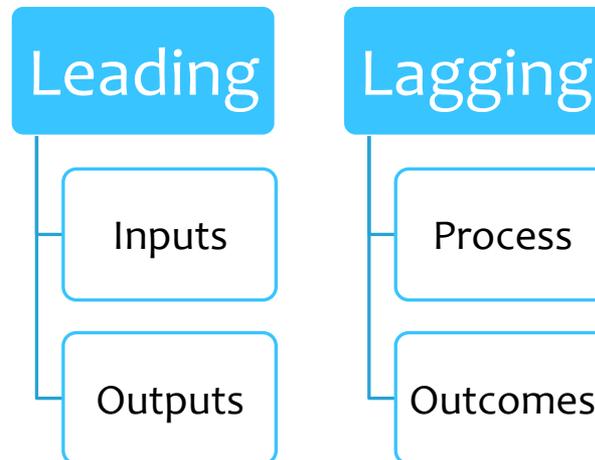
Pacing and Spacing

- * **Pacing: how fast we move through the change activities**
- * **Spacing: breaking change into manageable steps**
- * **Mistakes in pacing and spacing can cause initiatives to lose momentum**
- * **Quarterly activities are designed to help us manage pacing and spacing.**
- * **If the pacing is too quick we can slow it down. If the spacing isn't working right we can retool our design**
- * **Plan can be changed and adjusted**

Developing the Transformation Blueprint – Measuring Results

- * Indicator: provides *specific* information on the **state** or **condition** of how well we are doing in moving towards our success measure

**Drive
Performance
Signals a future
activity**



**Results
Oriented
Follows an
activity**

Leading and Lagging Indicators

- * Lagging indicators without Leading indicators tell you nothing about how the outcomes will be achieved
- * No early warning of being on track to achieve strategic goals
- * Leading indicators without Lagging indicators may enable you to focus on short-term performance, but you will not be able to confirm that broader agency outcomes have been achieved
- * Leading indicators should enable you to take pre-emptive actions to improve your chances of achieving strategic goals
- * Leading indicators often captured at individual process level
- * Lagging indicators are often the result of changes in several leading indicators

Leading Indicators: The “What”

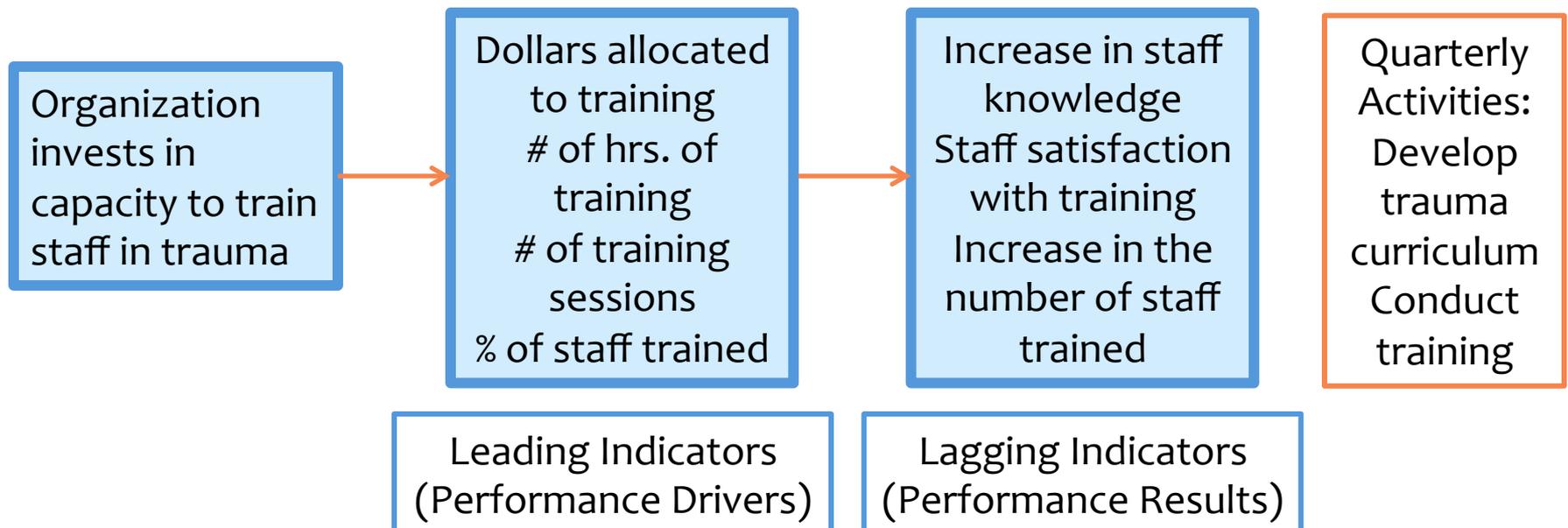
- * **Inputs:** Measures resources, both human and financial devoted to a particular intervention, activity or strategy
 - * e.g. number hours spent in training, amount of training dollars
- * **Outputs:** Measures quantity of goods or services produced & efficiency of production or services
 - * e.g. number of staff trained

Lagging Indicators: the “How”

- * **Process:** measures ways in which activities or program services are provided
 - * e.g. participation in training measured by attendance
- * **Outcomes:** Measures broader results achieved through what got done; changes in behaviors, experiences and attitudes
 - * e.g. increase in staff knowledge

Building a Strategic Dashboard

- * **Driving force goal: Address child and family trauma through the full organization adoption of integration of traumainformed work that ensure we do not re-traumatize or exacerbate the symptoms of trauma.**



Goal: Address child and family trauma through the full organization adoption of integration of trauma informed work that ensure we do not re-traumatize or exacerbate the symptoms of trauma.

Success Measure

Leading Indicators

Lagging Indicators

Organization invests in capacity to train staff in trauma

Youth will receive a higher quality of trauma informed services

Clients experience greater safety, permanency and well-being

Dollars allocated to training
of hrs. of training
of training sessions
of staff trained

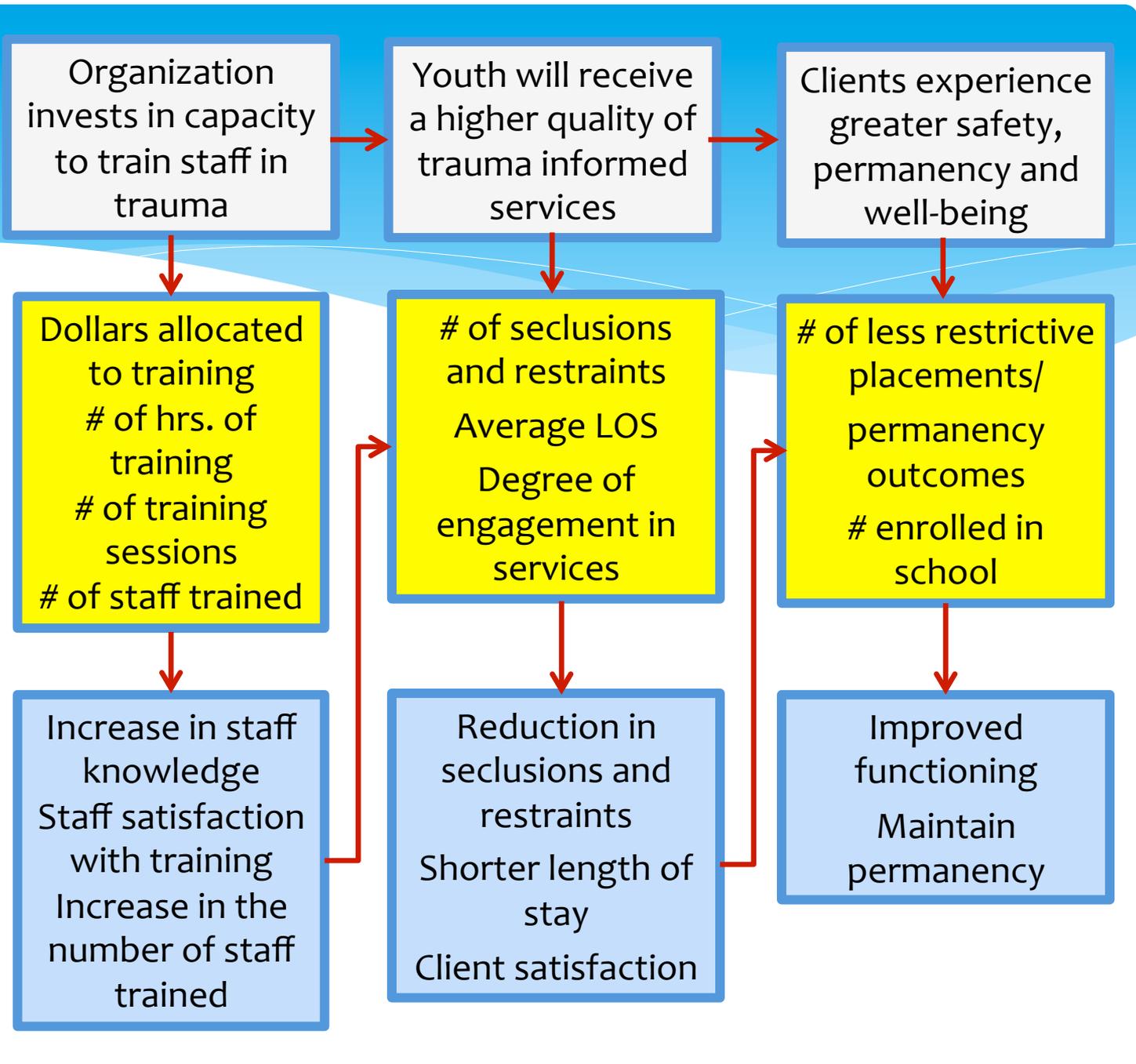
of seclusions and restraints
Average LOS
Degree of engagement in services

of less restrictive placements/
permanency outcomes
enrolled in school

Increase in staff knowledge
Staff satisfaction with training
Increase in the number of staff trained

Reduction in seclusions and restraints
Shorter length of stay
Client satisfaction

Improved functioning
Maintain permanency



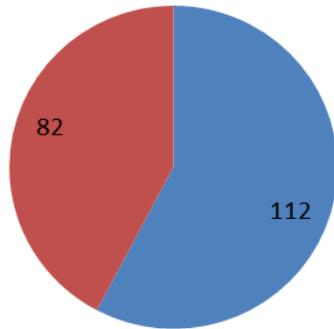
Project Dashboard

Goal #2: Address child and family trauma through the full organization adoption and integration of trauma-informed work that ensures that we do not re-traumatize or exacerbate the symptoms of trauma.

FY17	Activity	Leading Indicator/Deliverable	Status Indicator	Comment
Q1	Complete the literature review of evidence based/informed programs and trainings.			This will be ongoing in the Research team.
Q1	Budget and hire a Training Coordinator to lead project and lead Training Coordination and Research team.	Training Coordinator is hired		Keith was hired.
Q1	Develop the Training Coordination and Research team that includes a training point person from each department.	Training Coordination and Research team is established.		A team charter has been completed and the team has met 2X this quarter.
Q2	Develop a trauma-informed agency assessment tool the measures degree of knowledge and incorporation of trauma-informed principles into service delivery and agency culture.	Assessment is completed		
Q3	Disseminate the trauma-informed agency assessment tool.			
Q3	Complete analysis and discussion of results/next steps.	Measure of degree of trauma-informed practices across agency and baseline measure of staff knowledge		
Q3	Training coordinator conducts focus groups as follow up to assessment to drill down into specifics by program.	Number of focus groups/number of participants		
Q3	Review results of focus groups and incorporate information into future activities.	Analysis of focus group results		
Q3	Develop beginning level TRANSIT training curriculum. (New Employee Orientation)	Training curriculum completed.		
Q3	Train all agency staff on the beginning level of TRANSIT.	Number of staff trained/number of training sessions held.		
Q3	Incorporate beginning level of TRANSIT into New Employee Orientation.	# of NEO sessions with TRANSIT training.		
Q3	Develop training on compassion fatigue and secondary trauma.	Training curriculum completed.		
Q3	Determine measure to assess compassion fatigue/secondary trauma in direct service staff.	Measure is identified		

Project Dashboard

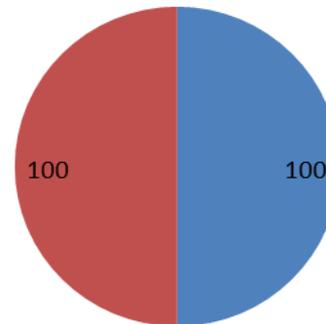
Employees with TBRI Training



■ Number of staff trained (includes 4 day training and TBRI inservice)

72% of staff have some TBRI training

Employees with trauma training



■ Number of staff trained includes ARC model, Identification of trauma symptoms, Implications of...

50% of staff have some trauma training

Strategic Dashboard

Strategic Dashboard						
FY17						
Leading Indicators	Target	Q1	Q2	Q3	Q4	YTD Progress
1. % of staff trained in TRANSIT	100%					
2. % of direct service staff trained in compassion fatigue	100%					
3. # of seclusion/restraints	10% reduction					
Lagging Indicators	Target	Q1	Q2	Q3	Q4	YTD Progress
1. Staff knowledge (increase in score)	95%					
2. Compassion fatigue (decrease in score)	90%					
3. Youth satisfaction rating	Mean rating 4.0					

Address child and family trauma through the full organization adoption and integration of trauma-informed work that ensure that we do not re-traumatize or exacerbate the symptoms of trauma
 Project Lead: Keith Brotheridge
 Coach: Rob Lusk

Training Coordination and Research team
 8/31/2016

Agency-wide assessment completed

Agency-wide assessment results
 1/31/2017

TRANSIT (NEO) curriculum developed
 2/28/2017
 Focus groups completed
 2/28/2017

Compassion fatigue training curriculum completed

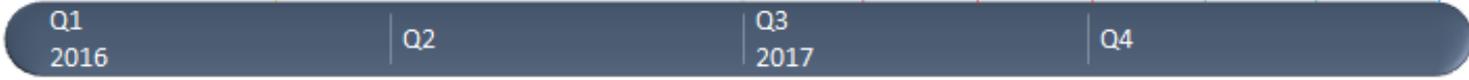
Agency-wide TRANSIT (NEO) training completed

Compassion fatigue baseline measure
 4/30/2017

Compassion fatigue training completed
 5/31/2017

TRANSIT levels training curriculum

TRANSIT job competencies



- Complete literature review Kathleen
- Hire Training Coordinator Sarah
- Develop Training Coordination/Research Team Kathleen
- Keith Develop agency trauma informed assessment/measure TRANSIT knowledge
- Disseminate trauma informed agency assessment tools Keith
- Complete analysis of assessment results/determine next steps QI
- Conduct staff focus groups/review results Keith
- Develop beginning level TRANSIT training (NEO) Keith
- Train all staff on beginning level TRANSIT/add to NEO Keith
- Develop training on compassion fatigue/secondary trauma Keith
- Determine measure for level of compassion fatigue/secondary trauma Keith
- Disseminate measure /analyze results of compassion fatigue/secondary trauma QI
- Train staff on compassion fatigue/secondary trauma Keith
- Identify TRANSIT competencies of specific job responsibilities Keith
- Develop graduated levels of TRANSIT curriculum Keith
- Develop training implementation plan with efficiencies and coordination Keith

Questions

Group Exercise – Option 1

- * Driving Force Goal: Adopt an organizational identity that understands that to best provide for the permanency and well-being of children and youth, we need to work equally as hard to strengthen families and communities.**

Group Exercise – Option 2

- * **Driving Force Goal:** Foster adaptive leadership that sets a clear vision that inspires and encourages our workforce and maintains high integrity. The adaptive leader ensures the creation of strategies, systems, and methods for performance excellence while encouraging others to embrace possibilities and break through barriers to deliver creative solutions.

Group Exercise Instructions

- * **Determine an overall success measure/outcome**
- * **Determine at least three activities that will lead towards success**
- * **Determine what leading indicators (inputs or outputs) will be used for the activities**
- * **Determine what lagging indicators will be used for the success measure/outcome**
- * **What is one indicator you would put on a dashboard?**