

GETTING STARTED:

TOOLS FOR FORMING, TRAINING, AND SUPPORTING QI TEAMS

2018 Illinois CQI Community Conference

In Pursuit of Quality: Building a Dynamic CQI Culture

WHO ARE WE?

Melissa Curtis

Manager of Quality improvement



Lawrence HallSM

Serving Children, Families and Communities Since 1865

**Programs: Foster Care, Residential, Therapeutic Day School,
Older Adolescent Program, and Youth and Community
Development (Vocational, Mentoring, Juvenile Diversion)**

WHO ARE WE?

Sabrina Townsend

Director of Evaluation and Quality Improvement



Jewish United Fund/
Jewish Federation
OF METROPOLITAN CHICAGO



Jewish Child
& Family Services
Redefine What's Possible.

cje SeniorLife 
Jewish values for positive aging

 **JCC**chicago



SHALVA



TAKEAWAYS

- **How to form and onboard program staff to a Quality Improvement (QI) process**
- **Practical tools for training and supporting QI teams**
- **Toolbox of ideas for building capacity in QI at your organization**

WHAT IS YOUR ORGANIZATION'S DEFINITION OF QUALITY IMPROVEMENT?

Quality improvement (QI) consists of systematic and continuous actions that lead to measurable improvement in health care services and the health status of targeted patient groups.

- [U. S. Department of Health and Human Services Health Resources and Services Administration 2011](#)

An organization-wide Performance and Quality Improvement system advances efficient, effective service delivery, effective management practices, and the achievement of strategic and program goals.

- [Council on Accreditation](#)

Quality improvement in public health is the use of a deliberate and defined improvement process, such as Plan-Do-Check-Act, which is focused on activities that are responsive to community needs and improving population health. It refers to a continuous and ongoing effort to achieve measurable improvements in the efficiency, effectiveness, performance, accountability, outcomes, and other indicators of quality in services or processes which achieve equity and improve the health of the community.”

- Riley, W., Moran, J., Corso, L., Beitsch, L., Bialek, R., and Cofsky, A. [Defining Quality Improvement in Public Health](#). *J Public Health Management Practice* 2010; 16(1)5-7.

Continuous quality improvement is the complete process of identifying, describing, and analyzing strengths and problems and then testing, implementing, learning from, and revising solutions. It relies on an organizational and/or system culture that is proactive and supports continuous learning. Continuous quality improvement is firmly grounded in the overall mission, vision, and values of the agency/system. Perhaps most importantly, it is dependent upon the active inclusion and participation of staff at all levels of the agency/system, children, youth, families, and stakeholders throughout the process.

- National Child Welfare Resource Center for Organizational Improvement and Casey Family Programs, 2005

FORMING QI TEAMS

ONE-SIZE FITS ALL
STORE

SALE



P. M. D. Art.

COMPOSITION OF THE TEAM

Size – how many people?

Roles – who should participate?

Existing or new meeting?

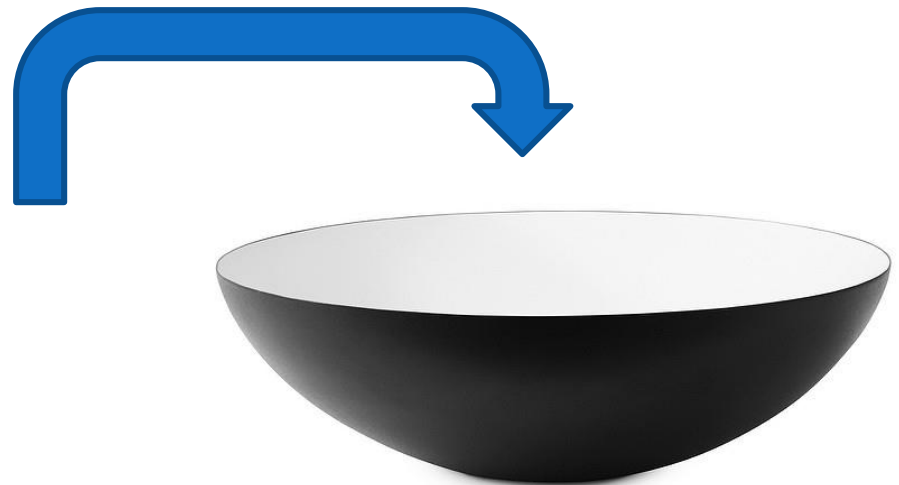


All depends on the purview of the team and the size of your organization

SETTING THE AGENDA

What topics/data are included? How often?

- Outcomes
- Service outputs
- Client satisfaction
- Client demographics
- Client needs
- Documentation compliance
- Staff satisfaction
- Staff retention
- Financial performance
- Other?



ONBOARDING AND ORIENTATION

CONTENT

1. What is QI?
2. What is the QI process?
3. Roles:
 - Chair
 - Note taker
 - Report presentations

FORMAT

New Hire Orientation

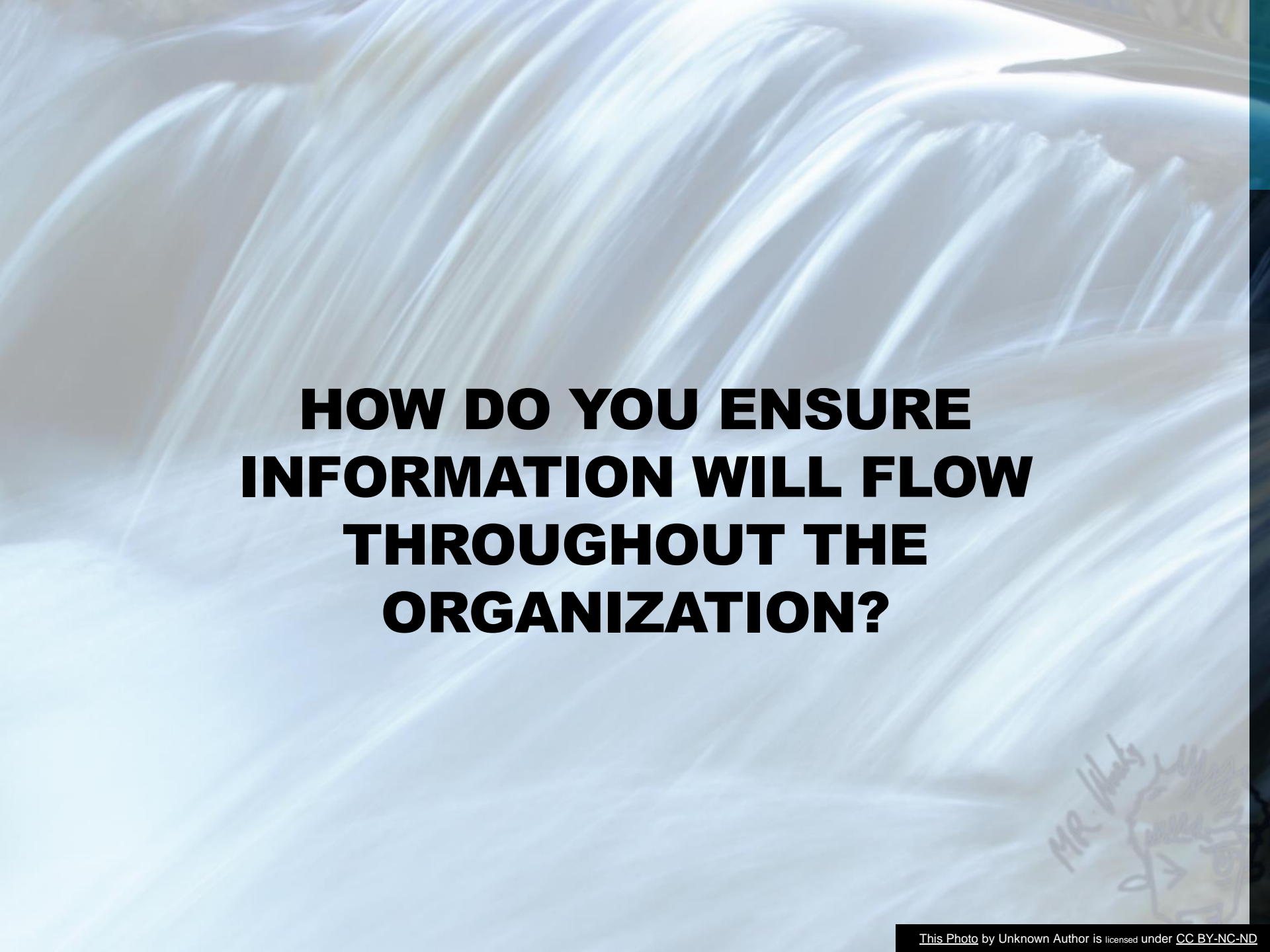
1:1 Training

Group Training

Video

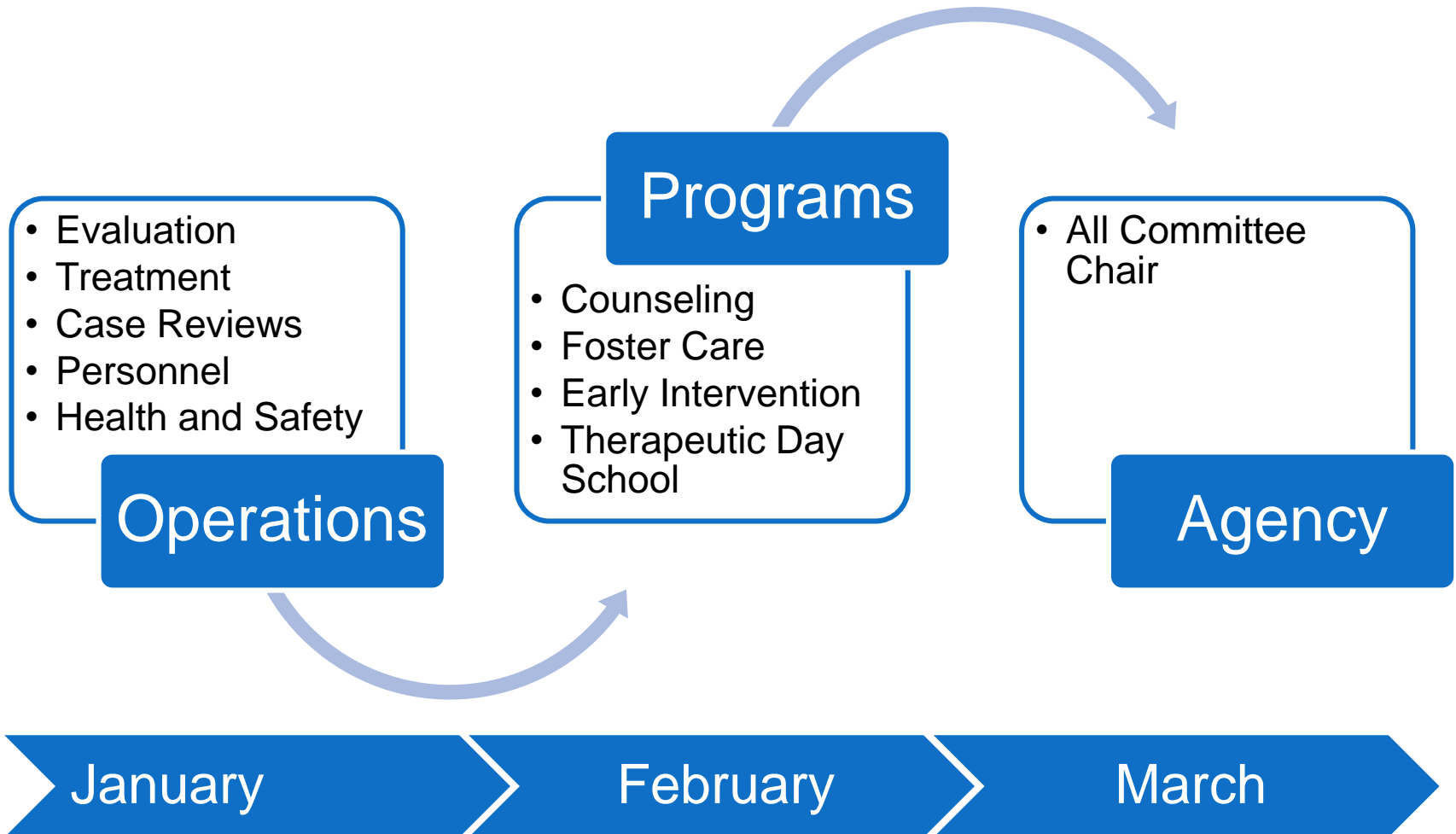
EXPECTATIONS AND RESPONSIBILITIES

- **Attend meetings**
- **Review reports prior to the meeting and be prepared to discuss areas needing improvement**
- **Complete assigned tasks in a timely fashion**
- **Share QI findings with the general team and bring issues from the team to QI**
- **Serve on the QI team for no more than 3 years, unless otherwise approved**



**HOW DO YOU ENSURE
INFORMATION WILL FLOW
THROUGHOUT THE
ORGANIZATION?**

QUARTERLY MEETING STRUCTURE



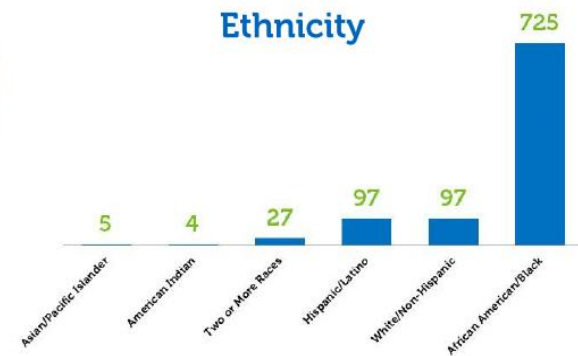
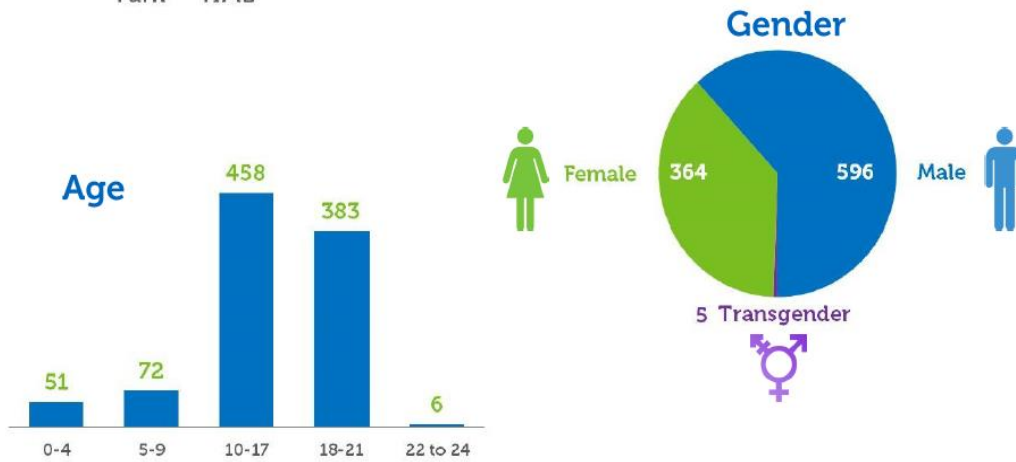
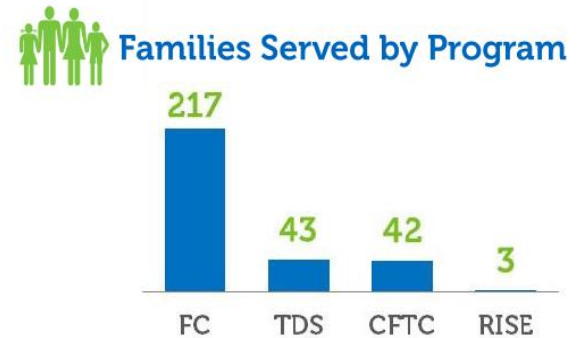
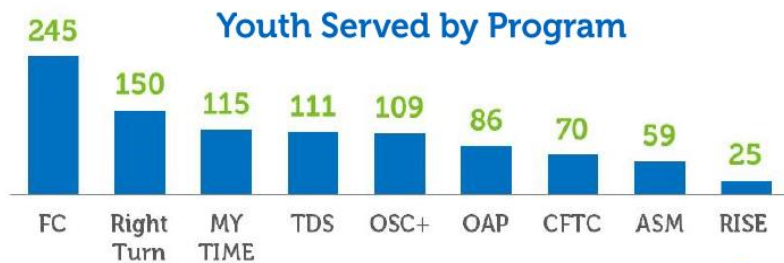
REPORT SAMPLE

Youth and Families Served

FY 2017

Total Youth Served: 970*

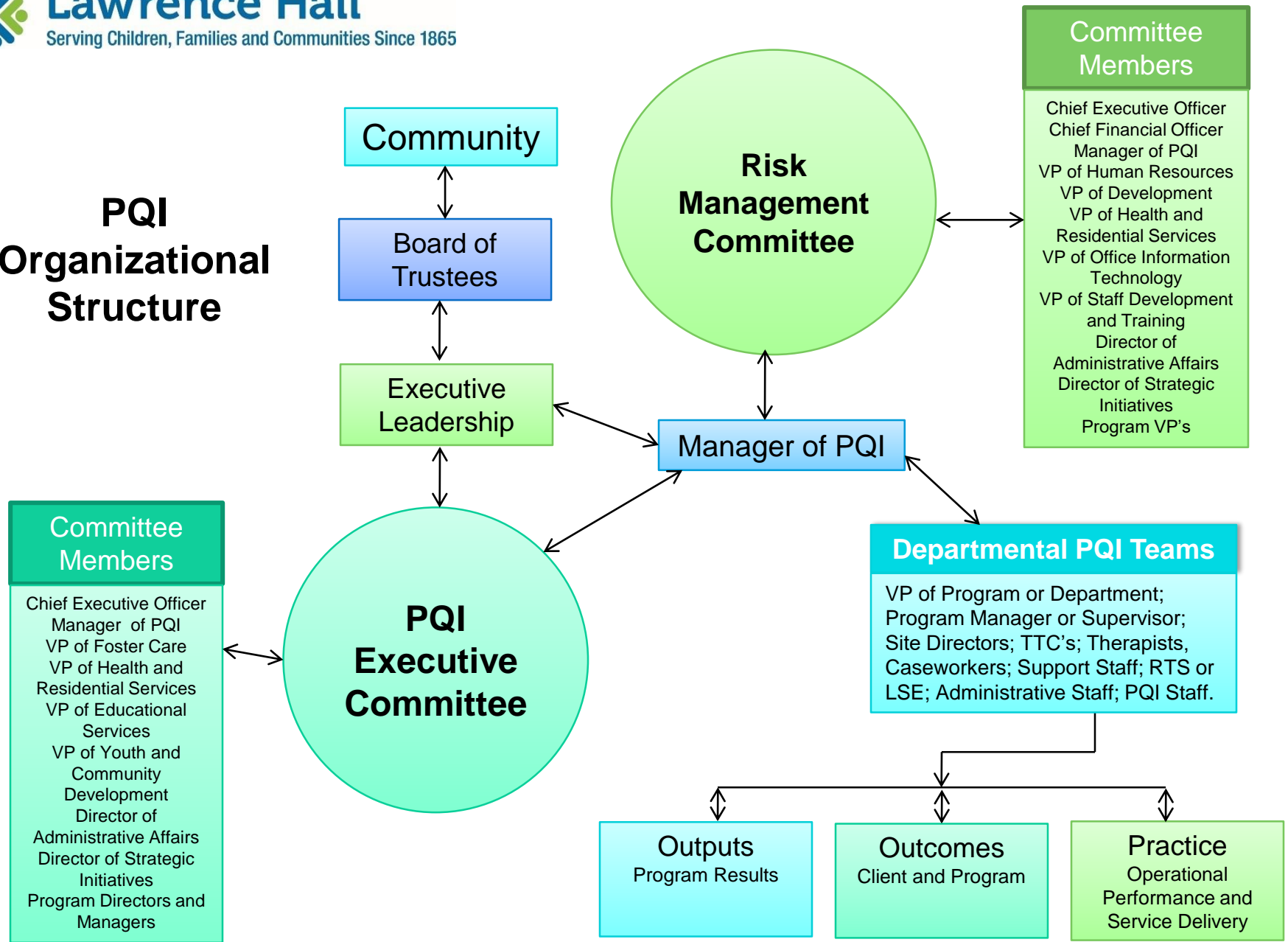
Total Families Served: 305*



*Some youth, adults and families participated in more than one service.

5 gender and 15 ethnicity were unknown.

**PQI
 Organizational
 Structure**



Committee Members

- Chief Executive Officer
- Manager of PQI
- VP of Foster Care
- VP of Health and Residential Services
- VP of Educational Services
- VP of Youth and Community Development
- Director of Administrative Affairs
- Director of Strategic Initiatives
- Program Directors and Managers

Community

Board of Trustees

Executive Leadership

Risk Management Committee

Committee Members

- Chief Executive Officer
- Chief Financial Officer
- Manager of PQI
- VP of Human Resources
- VP of Development
- VP of Health and Residential Services
- VP of Office Information Technology
- VP of Staff Development and Training
- Director of Administrative Affairs
- Director of Strategic Initiatives
- Program VP's

Departmental PQI Teams

- VP of Program or Department; Program Manager or Supervisor; Site Directors; TTC's; Therapists, Caseworkers; Support Staff; RTS or LSE; Administrative Staff; PQI Staff.

Outputs
 Program Results

Outcomes
 Client and Program

Practice
 Operational Performance and Service Delivery

TOOLBOX: FORMING QI TEAMS

- **Handout A: New Member Handout**
- **Handout B: Expectations for Committee Chairs**
- **Handout C: QI Orientation Presentation**
- **Handout D: Promoting A Quality Improvement Culture**

BUILDING STAFF CAPACITY IN QI

QI SURVEY FOR ALL STAFF

The QI Survey assesses:

- Knowledge
- Effectiveness of QI
- Communication
- Training
- Overall Satisfaction

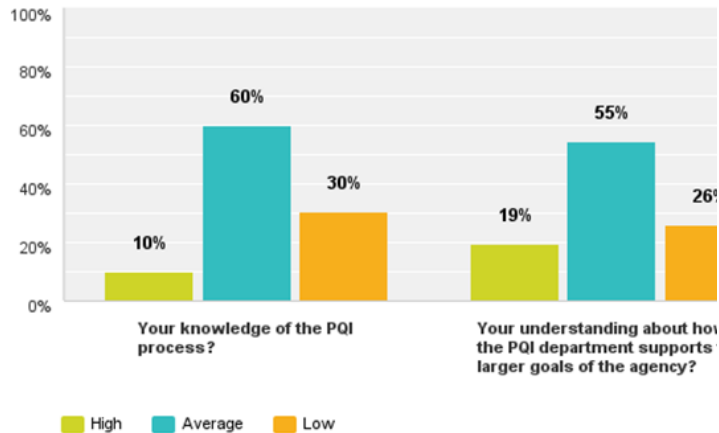


EXAMPLE OF QI SURVEY RESULTS

Approximately 267 QI surveys were distributed to staff agency wide on April 1, 2016. By the April 13th deadline, a total of 119 were completed for a 45% return rate.

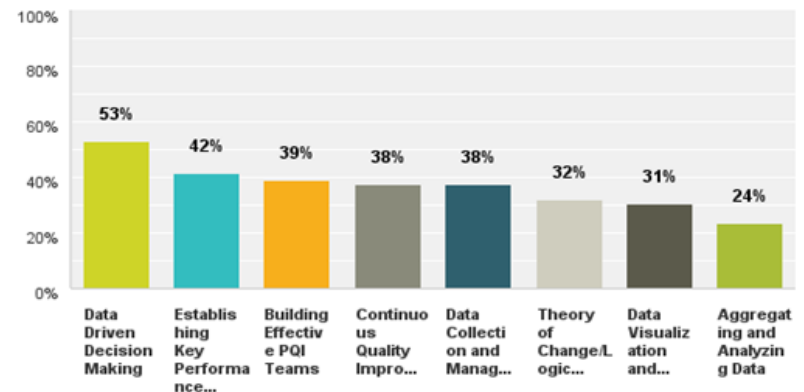
Q2 How would you rate...

Answered: 117 Skipped: 2



Q9 Please check the training and workshops that you would like to see the PQI department offer in the future (check all that apply):

Answered: 72 Skipped: 47



BUILDING CAPACITY: WHY USE A LOGIC MODEL?

- Using a simple logic model produces (1) an inventory of what you have and what you need to operate your program; (2) a strong case for how and why your program will produce your desired results; and (3) a method for your program management and assessment.
- Using evaluation and the logic model results in effective programming and offers greater learning opportunities, better documentation of outcomes, and shared knowledge about **what works** and **why**.

PROGRAM LOGIC MODEL

FY 2019

Mission Statement: **WHAT WE BELIEVE**

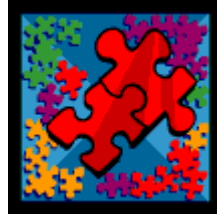
| PROBLEM/ISSUE STATEMENT (include population served) | RESOURCES | PROGRAM ACTIVITIES | OUTPUTS | OUTCOME | IMPACT |
|--|---|--|---|--|---|
| <p><i>What is the problem or issue this program is intending to solve?</i></p> <p><i>Who is the target population being served by the program?</i></p> <p>WHAT WE BELIEVE</p> | <p><i>In order to accomplish our set of activities, we need the following:</i></p> <p>WHAT WE DO</p> | <p><i>In order to address our problem or asset, we will accomplish the following:</i></p> <p>WHAT WE DO</p> | <p><i>We expect that once accomplished these activities will produce the following evidence of service delivery:</i></p> <p>WHAT WE DO</p> | <p><i>We expect this change in the client due to these activities:</i></p> <p>WHAT PARTICIPANTS ACHIEVE</p> | <p><i>We expect that if accomplished these program activities will lead to the following changes in 7-10 years.</i></p> <p>WHAT PARTICIPANTS ACHIEVE</p> |

PROGRAM LOGIC MODEL MEASUREMENT

| OUTCOMES | OUTCOME INDICATOR(S) | DATA REQUIRED | DATA SOURCE | DEFINITIONS and ELIGIBILITY |
|---|---|---|---|--|
| <p><i>We expect this change in the client due to program activities.</i></p> <p><i>This column should match the outcome column on the page 1.</i></p> <p>WHAT PARTICIPANTS ACHEIVE</p> | <p><i>How will you measure the outcome?</i></p> <p>WHAT PARTICIPANTS ACHEIVE</p> | <p><i>Define the Numerator/Denominat or</i></p> | <p><i>Where are you getting the data? Where and how is the data recorded?</i></p> <p>BE SPECIFIC</p> | <p><i>Who is eligible for this outcome? What does it mean?</i></p> |

USE CREATIVE THEMES TO ENERGIZE STAFF TO ENGAGE IN QI

Putting the PQI Puzzle Together



- 1. Puzzle Pieces - Speaking PQI Language**
 - 1.1. Terms, definitions, key phrases
 - 1.2. Difference between outcome, output, process

- 2. Putting the Pieces Together - Tracking PQI Data**
 - 2.1. PQI forms
 - 2.2. Agency Outcome Domains
 - 2.3. Setting Goals or Benchmarks
 - 2.4. Integrating PBC, COA, Medicaid, Licensing, Funder Reports

- 3. Checking Your Puzzle Work - Analyzing the Data**
 - 3.1. How?
 - 3.2. Importance of benchmarking
 - 3.3. Action Planning

- 4. Questions/Conclusion**

USE CREATIVE THEMES TO ENERGIZE STAFF TO ENGAGE IN QI

**Logic Models and Outcomes and PERFORMANCE Measures,
Oh My!!**

- **Used the Wizard of Oz to help staff understand why using a logic model is important**



USING STORYTELLING TO MAKE A CONNECTION

- **Once upon a time...there was a girl named Dorothy. She was very far from home, but had met many friends in this new land, which was called Oz. She and her friends were all in need of services from the Great Wizard of Oz who resided in Emerald City. When he found out what they needed, he provided services for each of them. The Scarecrow got a brain. The Tin Man acquired a heart. The Cowardly Lion received courage. And Dorothy finally got to return home. And they all lived happily ever after.**

NOW HERE ARE THE TOUGH QUESTIONS...



Did the brain help the Scarecrow pass his classes at school? Did he graduate and get a good job?



Was the Tin Man able to establish and maintain healthy relationships now that he had a heart? Was he able to improve his ability to identify and regulate his emotions?



Did courage make the Cowardly Lion feel safe in his home in the forest? Did courage help him take and maintain his responsibility in his job as the king of the forest?

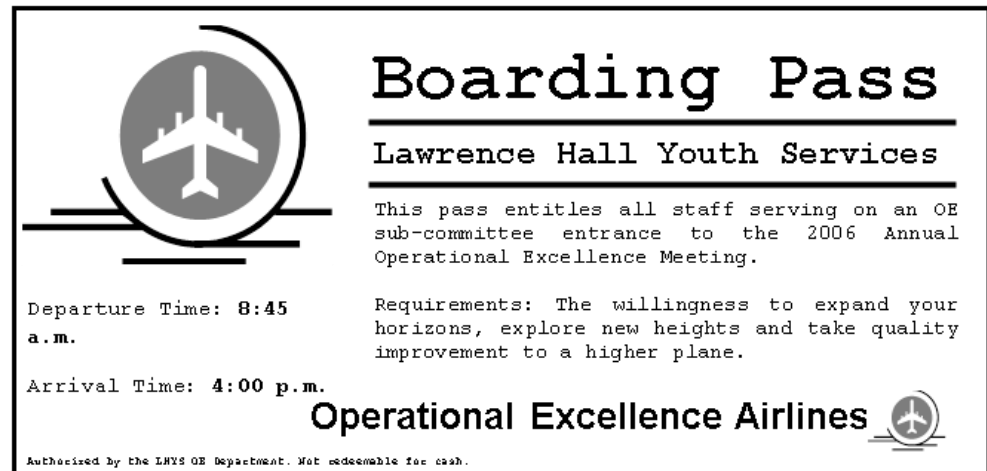


When Dorothy got home, did she try and run away again? Did she stay out of trouble with the neighbors? Did she remain safe in her placement?

USE CREATIVE THEMES TO ENERGIZE STAFF TO ENGAGE IN QI

A QI Planning meeting inspired by the movie The Aviator

- The invite was a passport
- Everyone had a boarding pass to enter
- An itinerary was used instead of an agenda
- Icebreaker: All teams had to come with an airline name and slogan



FLIGHT ITINERARY



- 8:45 am** Arrive at Airport. You are entering the world of aviation where you will pass through security and obtain travel information. Don't forget to grab some coffee, water, or juice plus some breakfast before boarding!
- 9:00 am** Boarding. Welcome to Operational Excellence Airline's Passport to Excellence jetliner. Don't forget to silence all electronic devices.
- 9:15 am** Take-Off! To ensure a successful take-off, you will be utilizing teamwork, brainstorming and strategic planning.
- 10:45 am** Beverage Cart. We will be serving a light snack with coffee, juice, and water this morning.
- 11:00 am** Plane Social. Get out of your seats, stretch your legs, and get to know the other passengers by telling them how your flight has been so far.
- 12:00 pm** Included Meal. Everyone will return to their seats for an enjoyable lunch of pizza and pop.
- 1:00 pm** In-Flight Movie. As you journey through the sky, learn tools that can be used to increase creativity and assist in the problem solving process.
- 2:30 pm** Refueling. We pause for much needed fuel during our long journey. Grab a drink and a snack to get you through the rest of the flight.
- 2:45 pm** Turbulence. Hold on tight and find your original travel companions so you can set short-term goals to get you through the bumps!
- 3:15 pm** Travel Stories. Share your travel experiences with the other passengers.
- 3:45 pm** Landing. Thank you for flying Operational Excellence Airlines. Find out the next steps for making your flight experience last.

FLASH ACTIVITY

In a small group, you have 5 minutes to come up with a creative theme for a staff training. Choose **ONE** of the following topics:

1. Understanding client satisfaction results
2. Developing a QI plan
3. Incident reporting
4. Setting performance targets
5. Data analysis



**WHEN IN DOUBT,
FEED THEM!**



TOOLBOX: BUILDING CAPACITY TO ENGAGE STAFF IN QI

- **Handout E: QI Survey Questions**
- **Handout F: Logic Model Tool**
- **Handout G: Key QI Terms and Definitions**
- **Handout H: What happened to the Wizard of Oz Characters?**
- **Handout I: Flight Itinerary**

SUPPORTING THE QI TEAMS

TIPS FOR A SUCCESSFUL QI MEETING

- **60 to 90 minutes**
- **A set agenda**
- **Materials sent at least one week in advance**
 - Team members assigned different reports to present
- **Keeping track of tasks to be completed**
- **Wrap up meeting with a summary of tasks and who is assigned (i.e. the QI Plan)**
- **Send out meeting notes within a week of the meeting**

COMMUNICATIONS AND REPORTING: QI SHAREPOINT SITE

- Libraries
- Drop Off Library
- PQI Documents
- Reports Library
- PQI Annual Reports
- Logic Models
- PQI Forms and Policies
- Survey Results
- Meeting Minutes
- Reference Library
- Agency Documents
- Risk Management
- Behavior Management Data
- OAP Youth Data
- Ongoing Projects
- Surveys
- Announcements
- Calendar
- Recycle Bin
- All Site Content

Performance and Quality Improvement

Announcements

Check out the FY 2017 PQI Annual Outcomes Report!
by Melissa Curtis

3/22/2018 10:50 AM

Hot off the presses...the **FY 2017 PQI Annual Outcomes Report** is here!!

The report details program outcome data collected through the Performance and Quality Improvement (PQI) process including youth demographics, current and comparative youth and families...

The Data Playbook-An Online PQI Resource
by Melissa Curtis

1/3/2017 5:10 PM

See more at: <https://www.schusterman.org/playbooks/data/>

For purpose-driven organizations, data means more than just numbers and graphs—it is about understanding what more you can do to change lives and strengthen communities. The Data Playbook provides...

[\(More Announcements...\)](#)

[+ Add new announcement](#)

Calendar

September, 2018

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------------------------------------|-------------------------------------|-----------|-------------------------------------|--------|----------|
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| | 2:30 pm - 3:00 pm TDS Admin PQI ! | 9:30 am - 11:00 a Right Turn PQI | | | | |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| | 9:30 am - 11:00 a Risk Management | | | 9:30 am - 10:30 a HR PQI Meeting | | |

Reports Library

Type Name

- Foster Care Dashboard Internal Worksheet FY 2019
- OAP-PQI Action Plan-FY 2018-FY 2019-DRAFT
- CFTC - QI action plan - Lawrence Hall - FY 2019
- Health Services-PQI Data Tracking Tool FY 2018 (Autosaved)
- RES SERV-PQI Data Tracking Tool FY 2018
- MY TIME-PQI Data Tracking Tool FY 2019
- RES SERV-PQI Data Tracking Tool FY 2019
- Health Services-PQI Data Tracking Tool FY 2018
- TDS-PQI Data Tracking Tool FY 2018
- OAP-PQI Data Tracking Tool FY 2018
- Right Turn-PQI Data Tracking Tool FY 2018
- OAP-PQI Data Tracking Tool FY 2019
- Spec Serv Tracking Form-FY 2018
- Residential Elopement Tracking - FY 19
- Foster Care-PQI Data Tracking Tool FY 2018
- Foster Care-SPEC-PQI Data Tracking Tool FY 2018
- TDS-PQI Data Tracking Tool FY 2019
- Health Services-PQI Data Tracking Tool FY 2019
- Foster Care-SPEC-PQI Data Tracking Tool FY 2019
- Foster Care-PQI Data Tracking Tool FY 2019
- Foster Care Dashboard Internal Worksheet FY 2018
- Expressive Therapies-PQI Tracking Form-FY 2019
- Community Programs-PQI Tracking Form-FY

QI SHAREPOINT SITE

Libraries:

- **Reports Library**
- **Annual Reports**
- **Logic Models**
- **PQI Forms and Policies**
- **Survey Results**
- **Meeting Minutes**
- **Reference Library**



COMMUNICATION AND REPORTING: ANNUAL REPORTS

Transitional and Independent Living

FY 2018

Two programs, Transitional and Independent Living, help youth age 17-21 transition from residential or foster care living to dormitory-like settings and eventually to independence. With each program, young adults receive specialized care, support, supervision and life skills services to ease their transition into adulthood. Average length of stay in the program is 3 years.

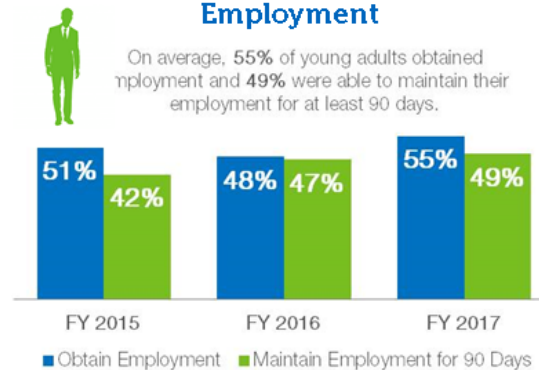
Young Adults Served

The TLP population in Illinois has been on the decline for last several years which resulted in a downsizing from FY 2016.



Employment

On average, 55% of young adults obtained employment and 49% were able to maintain their employment for at least 90 days.



Total High School Graduates



"Lawrence Hall taught me how to be more conscious and be more persistent when it comes to education and working."
Young Adult in Program



80%

70% of young adults demonstrated capacity at level 4 or above on the Casey Life Skills Assessment which assesses the behaviors and competencies youth need to achieve their long term goals.

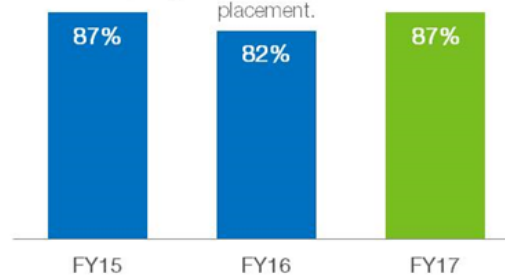
Overall Care and Quality

78% of youth in OAP were satisfied with the overall care and quality.



Stability in Living

87% of youth remained stable in their placement.



Emancipation

Of the 17 youth who emancipated from the program in FY 18:

- 70% met the educational outcome of earning a HS Diploma, GED, or Vocational Certificate.
- 82% were employed in the four weeks prior to emancipation.
- 83% received \$1200 in emancipation funds from IDCFS and left the program with an additional average of \$1498 in savings.



DIGGING INTO THE DATA

- **5 Why's**
- **Mr. Potato Head**
 - An interactive exercise to teach rapid cycle PDSA testing, measurement, and collaboration.



MR. POTATO HEAD

Accuracy Score:

3 All pieces are on and positioned correctly

2 All pieces are on, but one or more is out of place

1 One or more pieces are not on

CREATING IMPROVEMENT PLANS

- **Sample Improvement Plan**
- **Using Survey Monkey to Engage Staff**
 - Have your QI Team brainstorm improvement ideas
 - Send a survey to all staff in that program to vote on or rank top 3 initiatives
 - Build staff feedback into the plan



TOOLBOX: SUPPORTING QI TEAMS

- **Handout J: Sample QI Meeting Agenda**
- **Handout K: Sample QI Meeting Notes**
- **Handout L: 5 Why's Exercise**
- **Handout M: Mr. Potato Head Exercise and Tracking Form**
- **Handout N: Sample Improvement Plan**

OUR FAVORITE QI RESOURCES

Ann Emery

<https://depictdatastudio.com/>

Pew Research Center

<http://www.pewforum.org/>

Data Playbook

<https://www.schusterman.org/playbooks/data/>

Survey Random Sample Calculator

Icons for Everything

<https://thenounproject.com/>

Data Therapy

<https://datatherapy.org/>

Perform Well

<http://performwell.org/>

KaiNexus

<https://www.kainexus.com/>

Information is Beautiful

<https://informationisbeautiful.net/>

Kellogg Foundation Logic Model Guide

<https://www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide>

*Coming together is a
beginning.*

*Keeping together is
progress.*

*Working together is
success.*

Henry Ford

CONTACT INFORMATION

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