



PLAN | IMPLEMENT | EVALUATE

Strategic Methods for Building CQI

Applications & Tools for the Field

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PIE builds the capacity of mission-driven organizations to evaluate impact, promote learning, and facilitate equitable change



Evaluation & CQI at PIE

- 1 Learning**
"Data is a flashlight, not a sledgehammer"
- 2 Impact**
"Tell your story"
- 3 Empowerment**
"Chase your mission, not your funding"

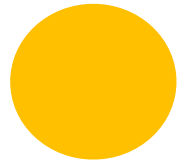
Evaluation & CQI at PIE

- 1 Learning**
"Data is a flashlight, not a sledgehammer"
- 2 Impact**
"Tell your story"
- 3 Empowerment**
"Chase your mission, not your funding"

Equity

"Collect data that promotes your values"

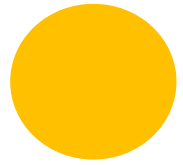
Defining Terms



Stakeholders

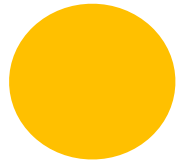
Board, Leadership, Staff, Participants/ Community Members, Funders/ Donors

Defining Terms



Stakeholders

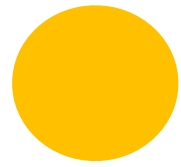
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Priorities

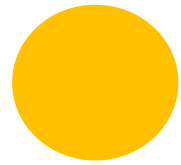
Goals, outcomes, or outputs identified by stakeholders as the most salient to your work.

Defining Terms



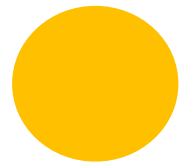
Stakeholders

Board, Leadership, Staff, Participants/ Community Members, Funders/ Donors



Priorities

Goals, outcomes, or outputs identified by stakeholders as the most salient to your work.



Theory of Change & Logic Model

High-level goals for external communication & a specific roadmap for internal guidance

Agenda

- 1** Introductions, Welcoming Activity
- 2** CQI Context
- 3** CQI Strategy
- 4** CQI Practices
- 5** Questions & Answer

Learning Objectives

- 1** Highlight key organizational contexts that can support building and/or sustaining CQI.
- 2** Identify strategies to activate organizational contexts and begin the process of CQI buy-in/ sustainability.
- 3** Explore tools and practices to identify priorities across stakeholders and implement CQI at your organization.
- 4** Engage in peer discussions to think through how to leverage today's presentation in your own context.

Checklist Handout



Take a minute or two and write down the biggest CQI challenge at your organization.



Use handout to make notes in real time and assess how your organization's CQI matches the theory, strategy, and methods discussed today



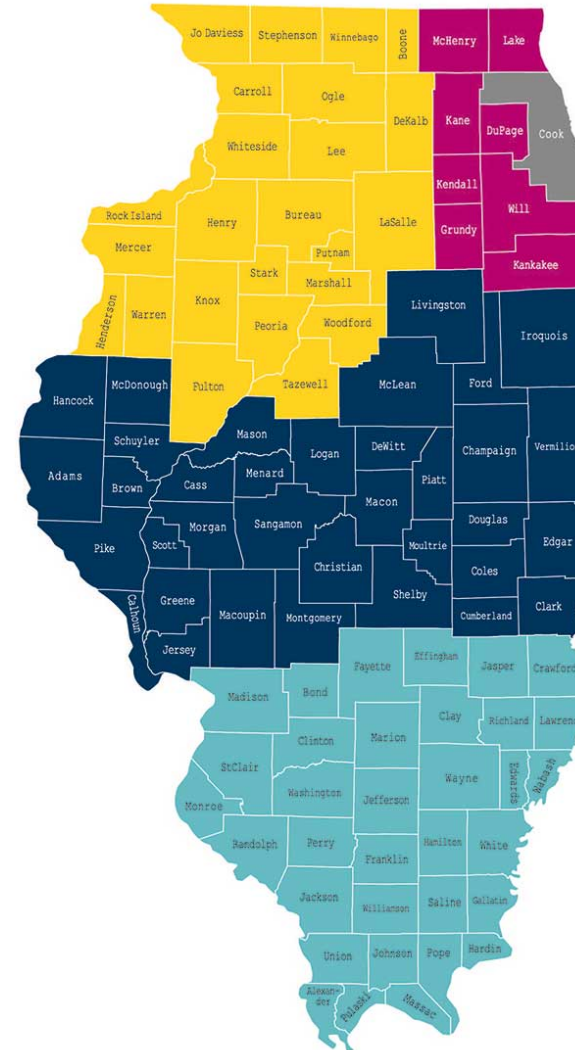
At the end of today's presentation, you will have a general assessment of ways to improve and/or learn more about CQI at your organization!

Welcome!

Group Activity

Sit/ Stand – Who is in the room?

-  **Region 1** - Northwestern Illinois
-  **Region 2** - Central Illinois
-  **Region 3** - Southern Illinois
-  **Region 4** - Cook County
-  **Region 5** - Collar Counties



Sit/ Stand – Who is in the room?



Sit/ Stand – Who is in the room?



Sit/ Stand – Who is in the room?

Expert

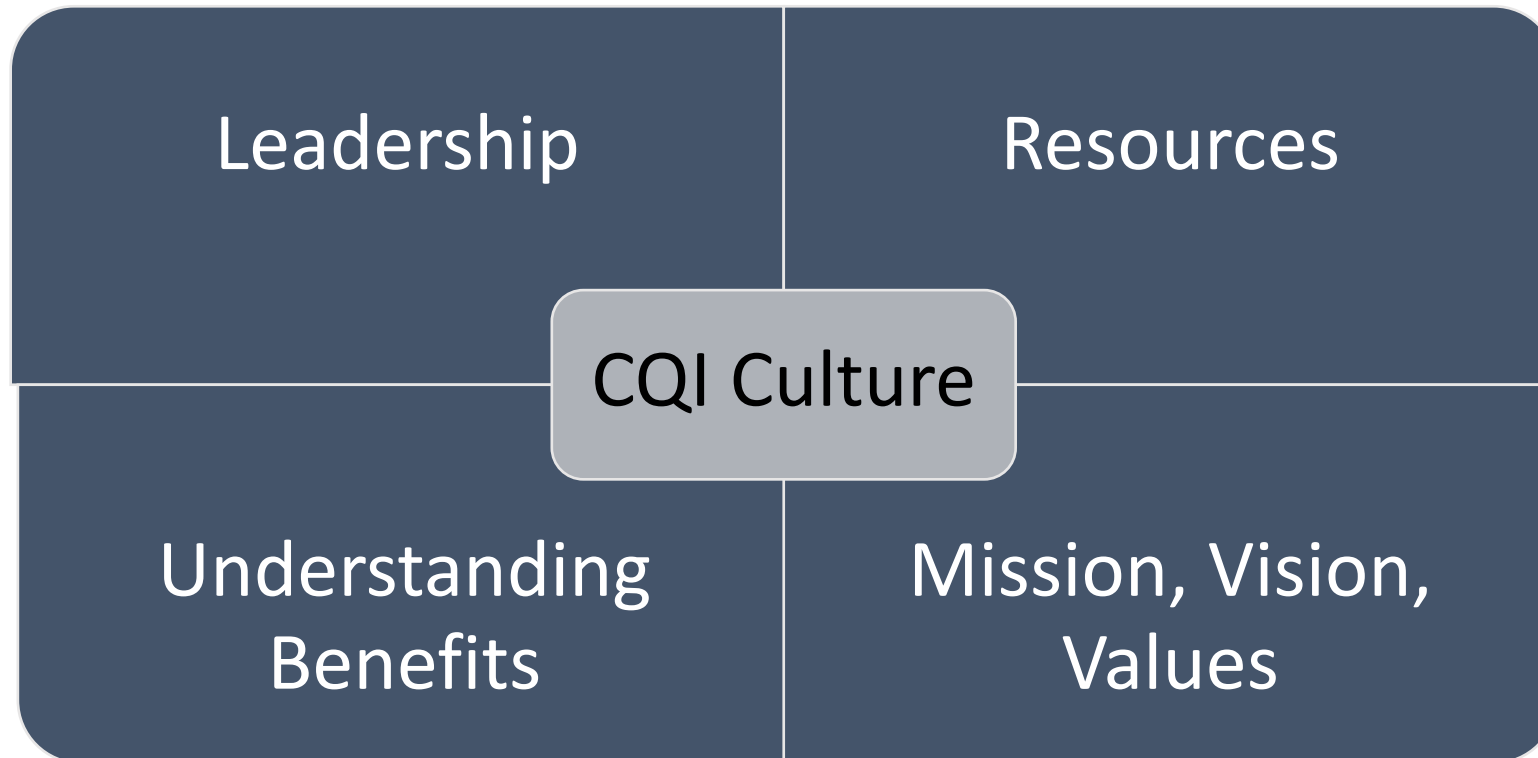
Intermediate

Beginner

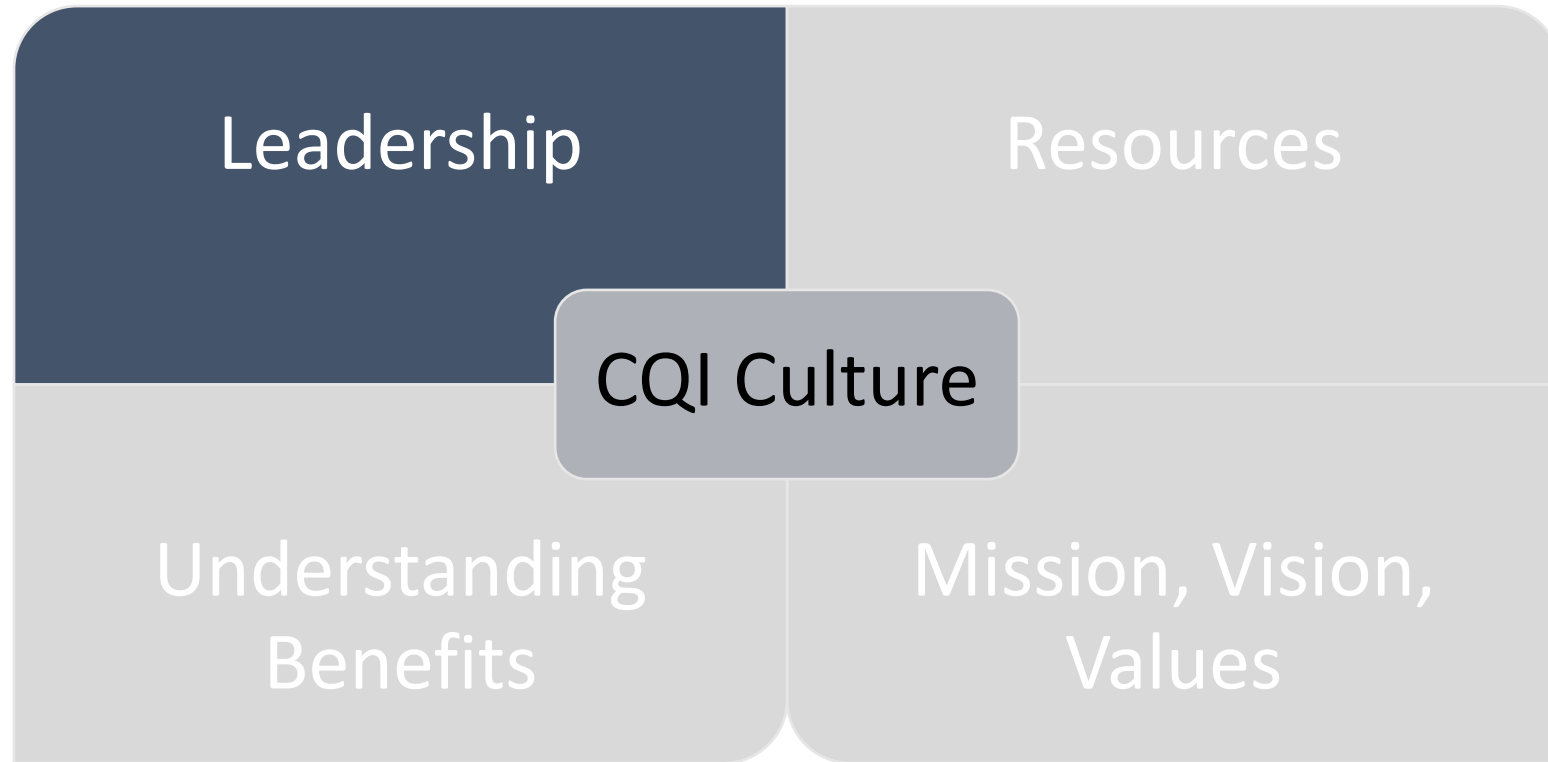
Organizational Context

Gardening Soil & Environment

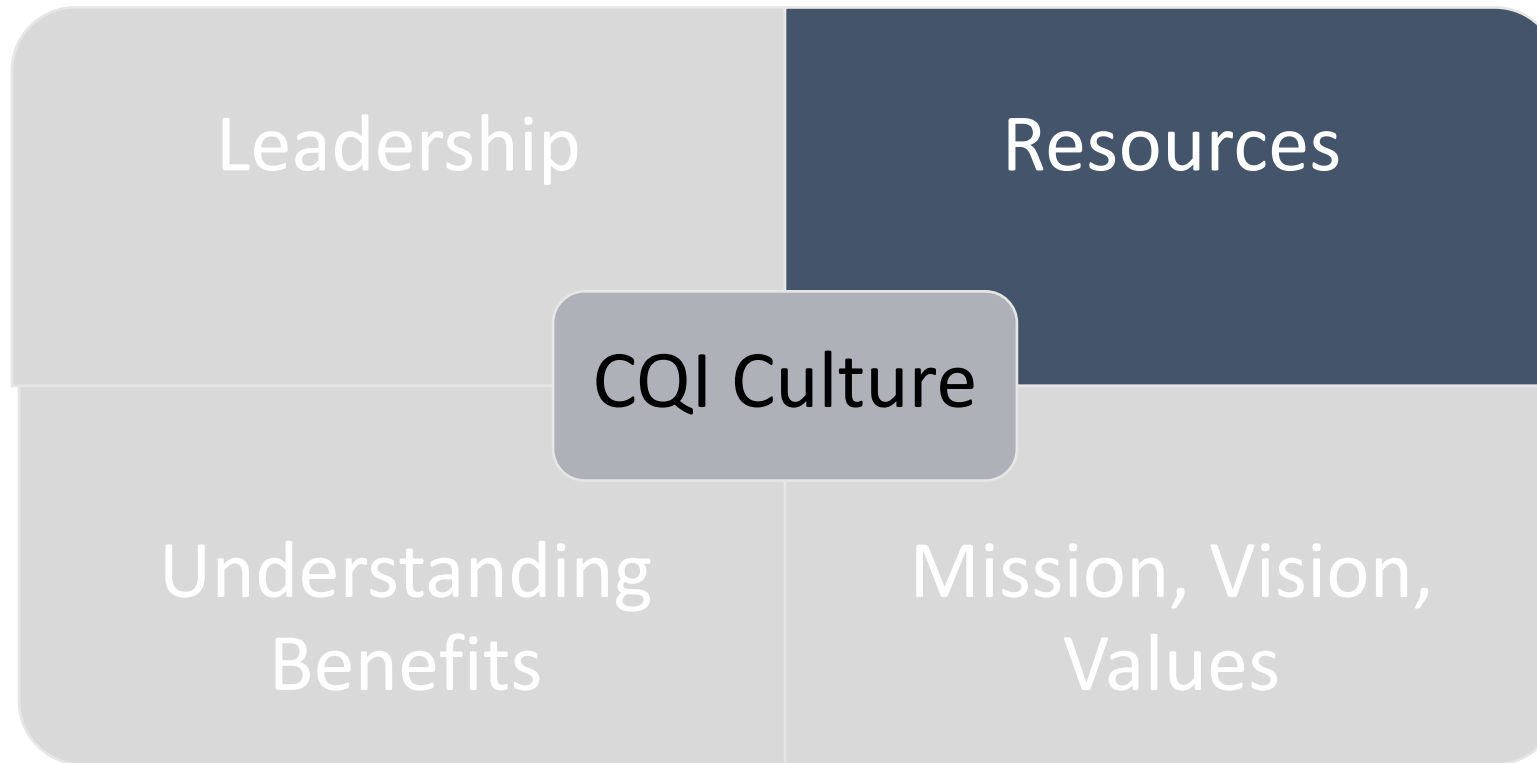
Organizational Context



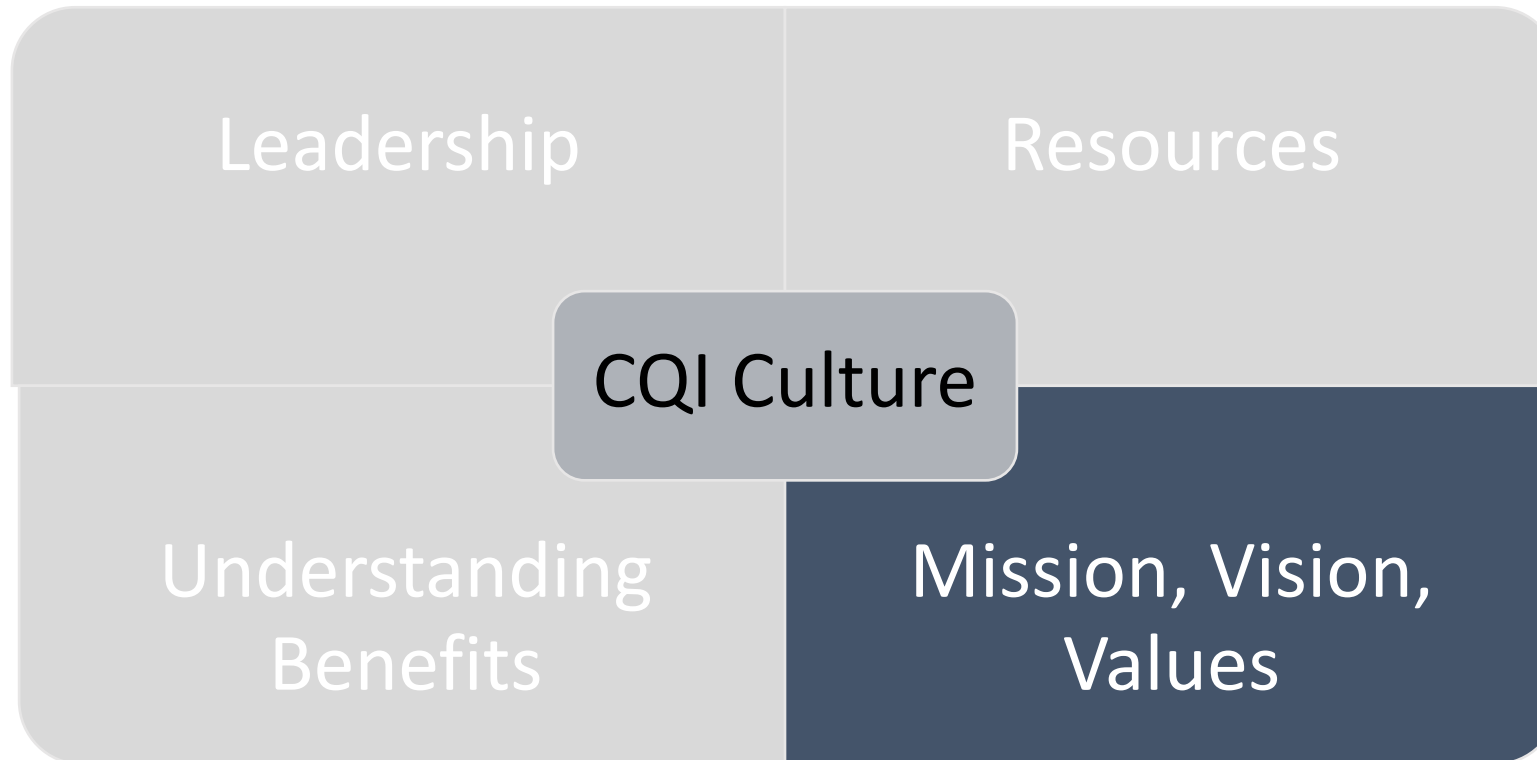
Leadership



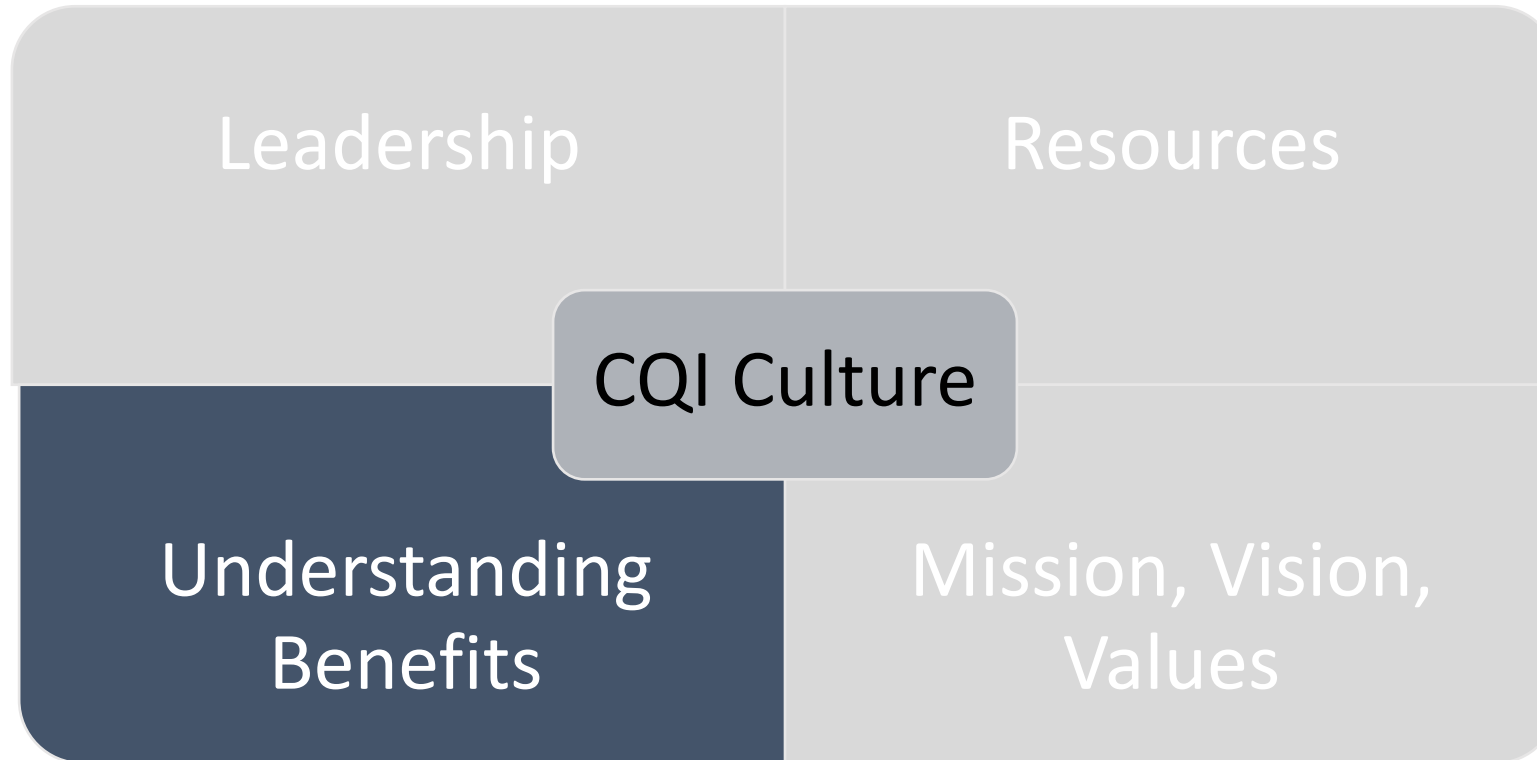
Organizational Context



Organizational Context



Organizational Context



Poll Activity

✓ PolLEV.com/pieday



CQI Conference Poll

0 done

 **0 underway**

Leadership is bought in and engaged in CQI

Yes

No

Unsure

My organization dedicates an appropriate amount of resources towards CQI

Yes

No

Unsure

CQI is explicitly aligned to the mission, vision and values of my organization.

Yes

No

Unsure



Our organization/program staff understand the benefits of evaluation

Yes

No

Unsure

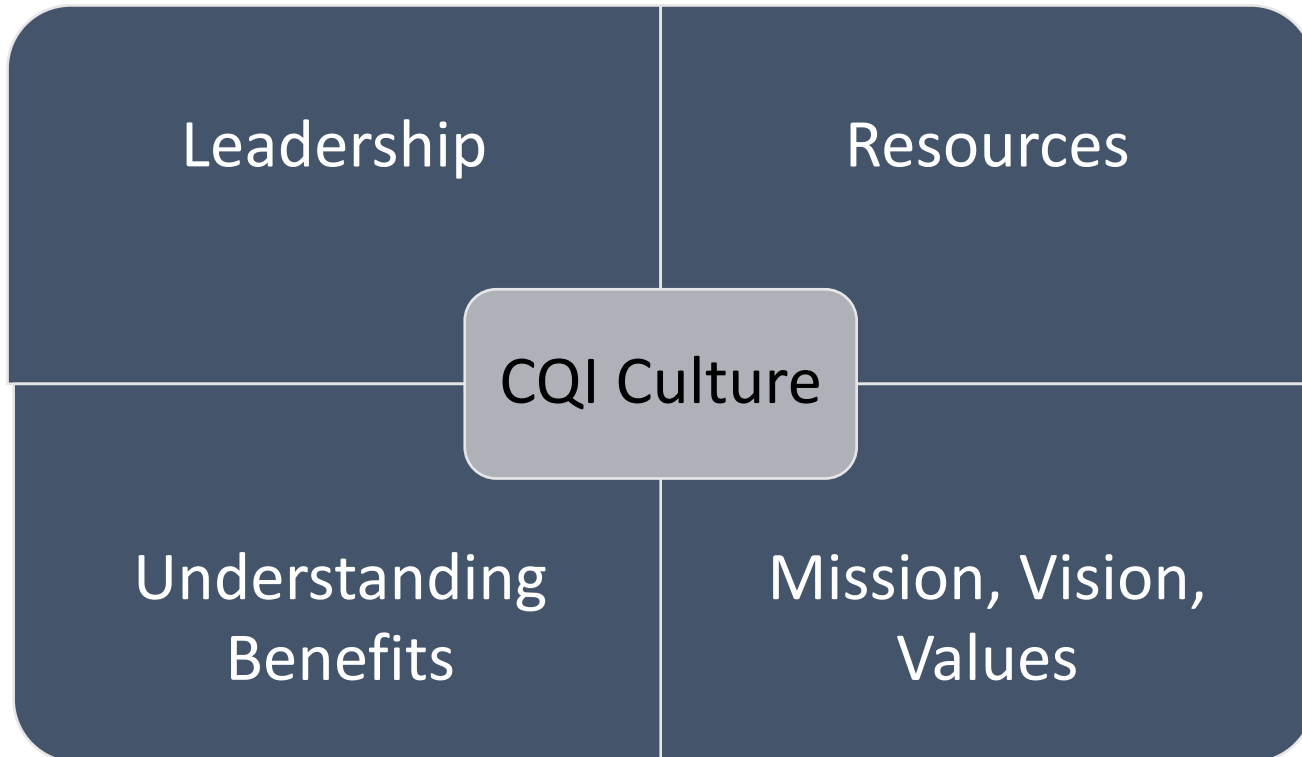
Pair & Share

- **How does this model fit your own experiences?**
- **What are the strengths of your organization on this model? Challenges?**
- **What do you think is missing here? What questions do you have?**

Strategic Applications

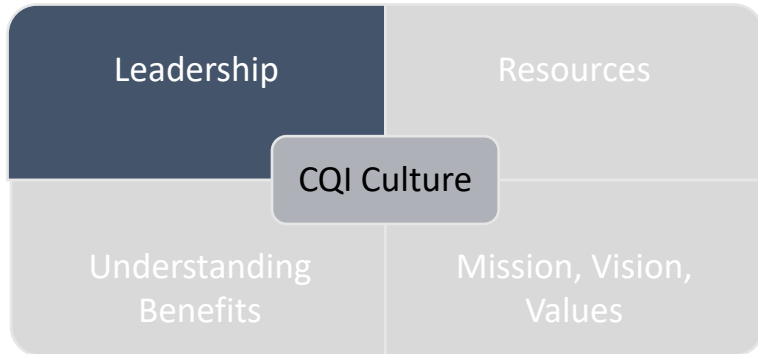
Gardening Techniques

Organizational Context



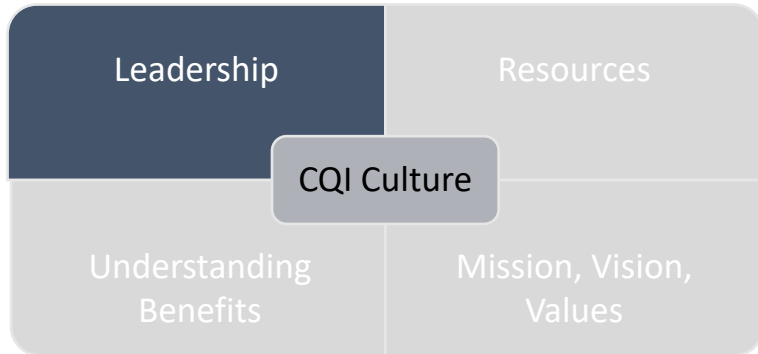
Q: We identified the most important contexts, but *how can we engage these contexts to build and sustain CQI?*

Leadership Strategies



Q: *How can we engage Leadership to build and sustain CQI?*

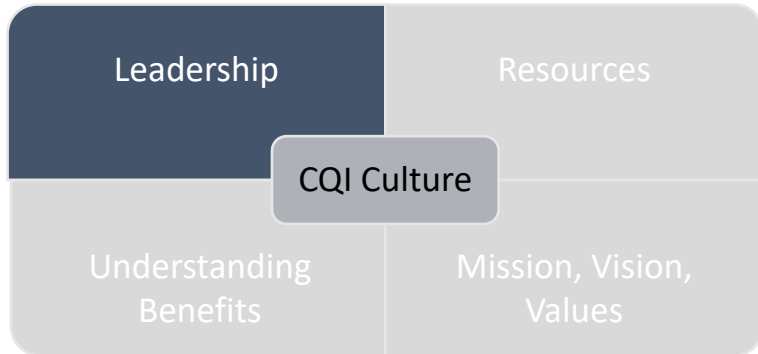
Leadership Strategies



Q: *How can we engage Leadership to build and sustain CQI?*

- A:**
- **Need to align CQI to internal needs of leadership**
 - **Often, this includes incorporating critical leadership-level documentation as part of the CQI process and mapping out needs across stakeholders***

Leadership Strategies

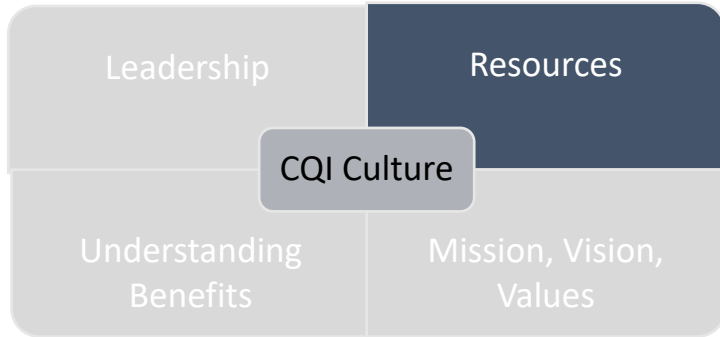


Q: *How can we engage Leadership to build and sustain CQI?*

A:

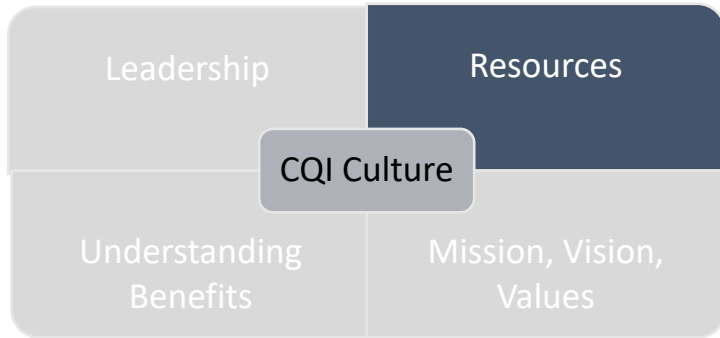
| Leadership | CQI Strategy |
|----------------------------|---|
| Board | <ul style="list-style-type: none">• Strategic Plan• Theory of Change• Fundraising & Communication plans |
| Organizational Leadership* | |
| Program Leadership | Logic Models |

Resources Strategies



How can we document and outline our Resources to build and sustain CQI? To advocate for our capacity?

Resources Strategies

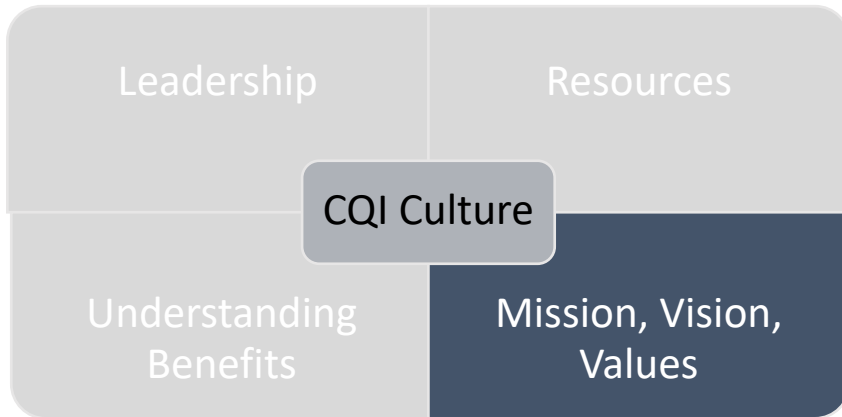


How can we document and outline our Resources to build and sustain CQI? To advocate for our capacity?



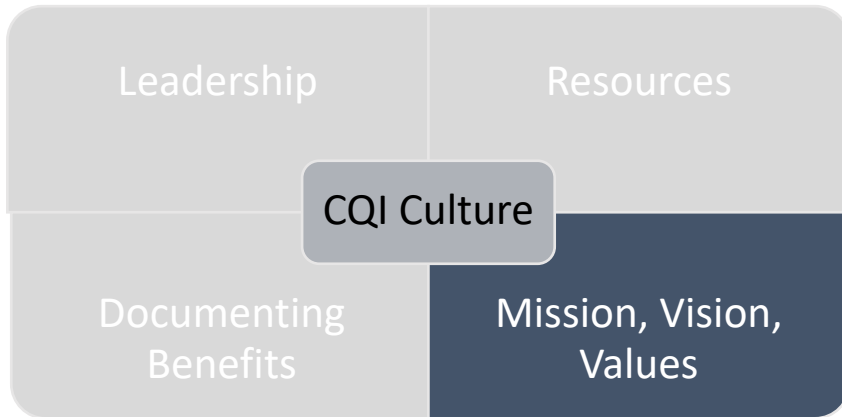
- **Budget Review**
- **Time Analysis**

Mission, Vision, Values Strategies



How can we align Mission, Vision, Values to CQI?

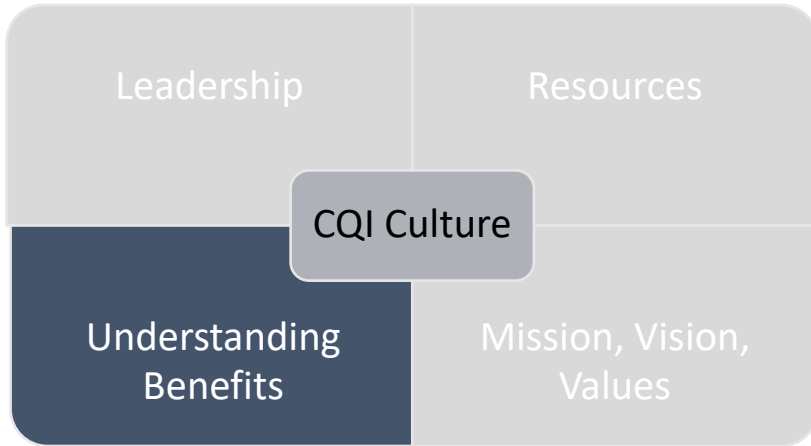
Mission, Vision, Values Strategies



Q: *How can we align Mission, Vision, Values to CQI?*

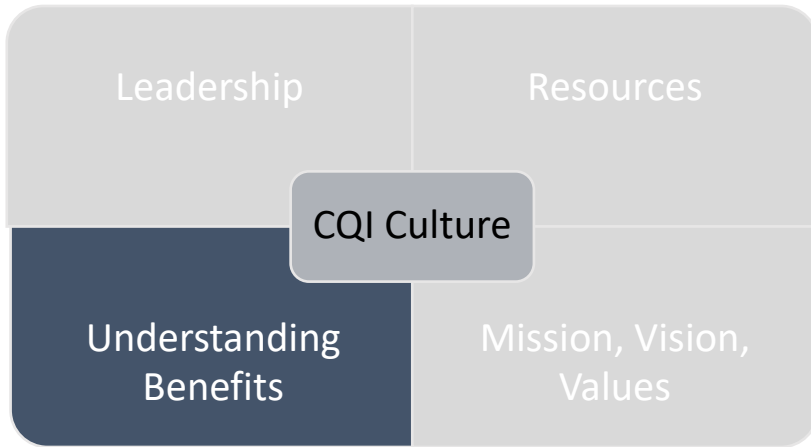
- A:**
- **Operationalization of mission, vision, values.**
 - **DEI**
 - Integration of DEI and CQI
 - Identification of equity variables

Understanding Benefits



How can we ensure data-informed decisions are documented and celebrated to ensure staff are engaged with the CQI process?

Understanding Benefits



How can we ensure data-informed decisions are documented and celebrated to ensure staff are engaged with the CQI process?



- **Staff priorities**
 - Logic Model
- **Internal Communications**
 - Data Dialogues & Data Walks
 - Staff Celebrations

Checklist Pair & Share

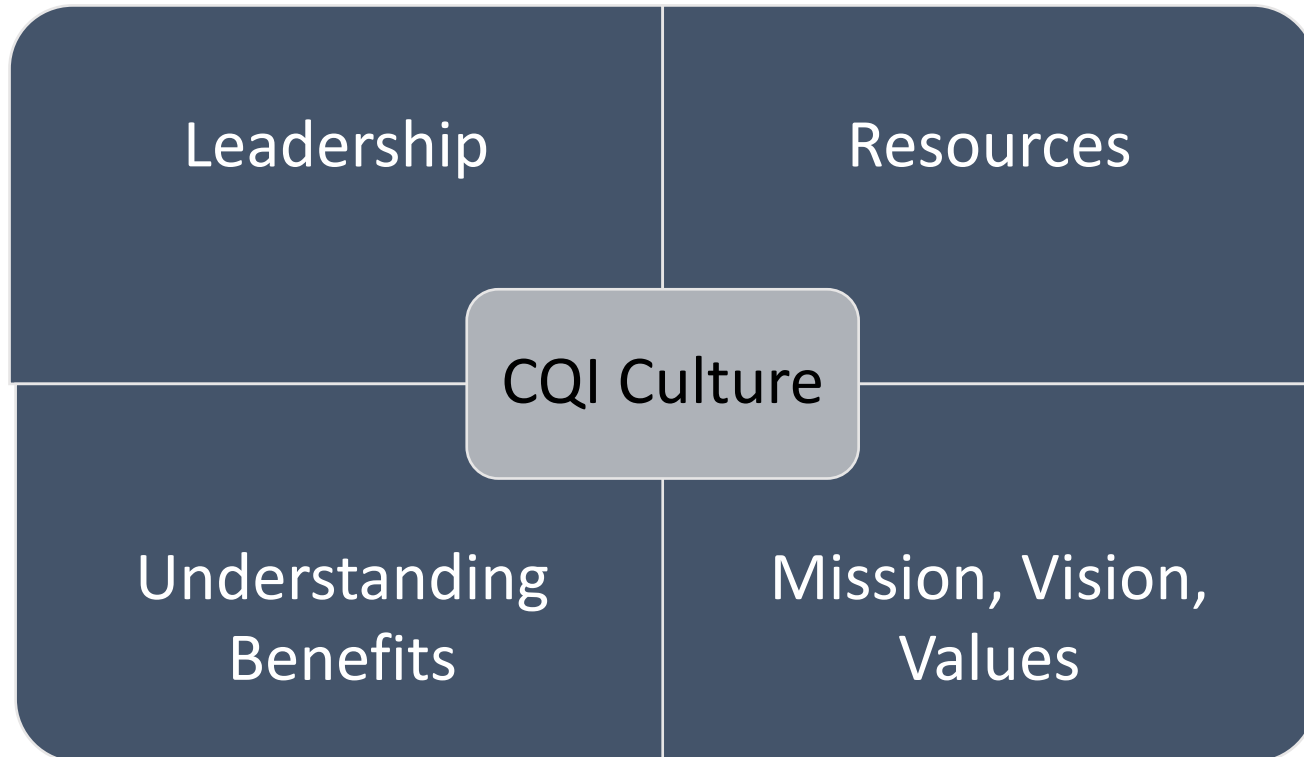


Take a minute or two and update your checklist now. Where are you seeing assets and gaps in your practice? How might these context or strategies map onto your biggest CQI challenge? What questions do you have?

CQI Practices

Gardening Tools

Organizational Context

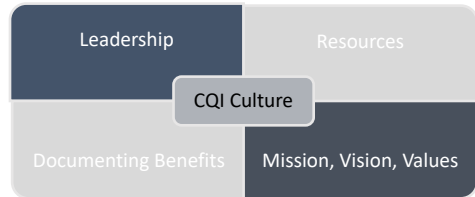


Q: We know strategies to engage these contexts—*but how can we execute this work? What does this look like in practice?*

Building CQI - Practices & Tools

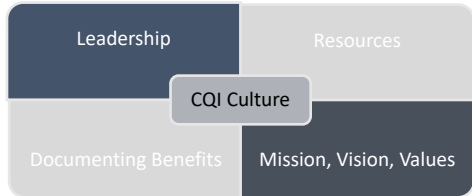
- 1 Mapping Exercises – Priorities & Stakeholders**
- 2 Operationalization of Mission, Vision, Values**
- 3 Data Audit**
- 4 Consensus Building**
- 5 Budget Review**
- 6 Visualization Software**

Priority Mapping



- Q:** What are the strategic priorities of our organization/ department/ program? How do these priorities vary by stakeholders? How can we create priorities if strategic plans/ logic models do not exist or are not relevant?

Priority Mapping

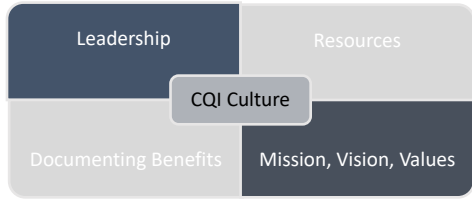


Q: What are the strategic priorities of our organization/ department/ program? How do these priorities vary by stakeholders? How can we create priorities of strategic plans/ theory of change/ logic models do not exist or are not relevant?

A: Mapping Exercises

- Google Jamboards
- In-person post-it exercises
- With each stakeholder* group, or ideally, with all of them together

Priority Mapping



Guiding Questions

What questions do you want to answer about the impact of PROGRAM



Given the purpose, values, and guiding questions, what goals make sense for PROGRAM



Goals

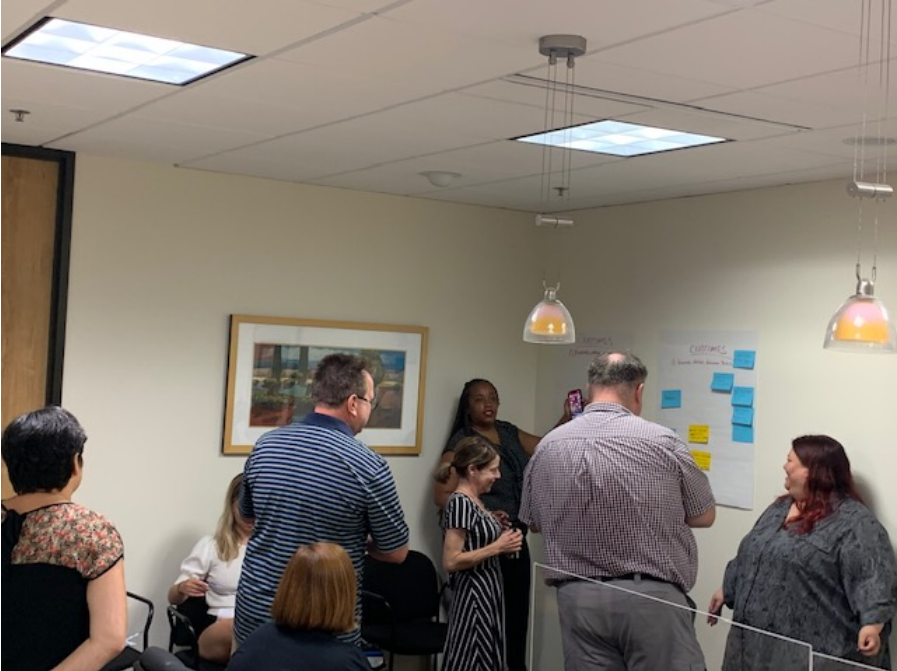
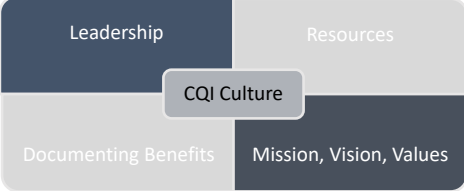
What are the key equity levers we want to identify? How do we want to uplift and monitor equity in this PROGRAM?



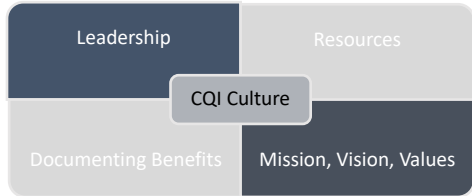
Where are gaps in knowledge? What more do we need to know



Priority Mapping

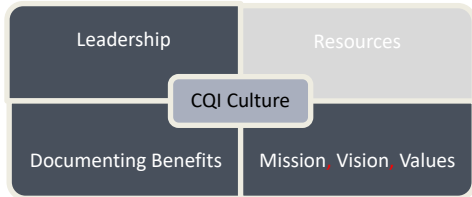


Priority Mapping



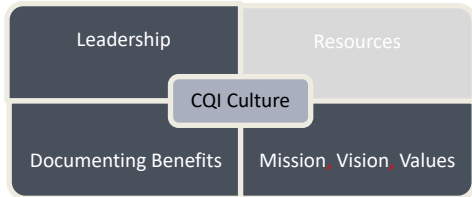
| Stakeholder Group | Goal Priorities | Equity Priorities |
|-------------------------------|---|---|
| Board | #s Served, Stable Housing, Employment* | Returning Citizens |
| Leadership | #s Served, #retained, Stable Housing, Employment* | Returning Citizens BIPOC males |
| Staff | #s Served, #retained, Living Wage | Returning Citizens BIPOC males Rural Citizens |
| Participant/ Community Member | Living Wage | Returning citizens Former gang members |
| Funder | #s served, Employment* | Returning Citizens |

Operationalization of Mission, Vision, Values



Q: How can I make sure that CQI is explicitly aligned to the mission, vision, values of the organization?

Operationalization of Mission, Vision, Values

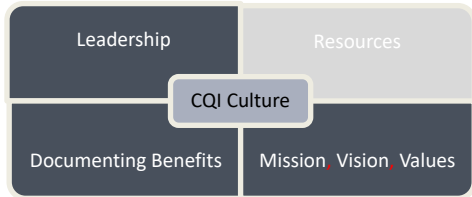


Q: How can I make sure that CQI is explicitly aligned to the mission, vision, values of the organization?

A: **Operationalization**

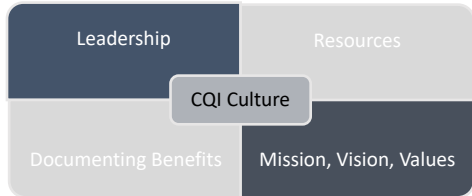
- Create a set of metrics and measurable outcomes aligned to core components of your mission, vision, and values. Through the priority mapping exercise, you should have a strong understanding of equity priorities, as well.

Operationalization of Mission, Vision, Values



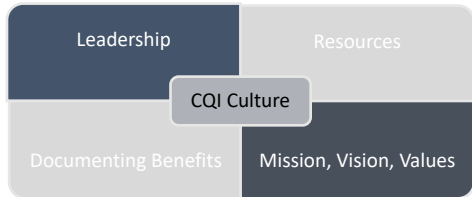
| PIE builds the capacity of mission-driven organizations to evaluate impact | What does this mean? | How do we do it? | What is success? |
|---|---|---|--|
| | <ul style="list-style-type: none"> • We collect and use data to understand organizational impact (i.e. intended, unintended) on communities, organizations, and/or participants. • Measure organizational, community, and participant changes in outcomes. • Determine what programmatic levers are associated with greater and lesser impacts | <ul style="list-style-type: none"> • We help clients identify the impacts they intend to have. • We implement the PIE Process to help clients learn, analyze, and reflect on their impacts: <ul style="list-style-type: none"> ○ Prepare ○ Develop ○ Learn • Capacity building approaches (see “Builds capacity”) • We use the CREE¹ Framework and mixed-methods analysis • We prioritize authentic collaboration and relationship building across partners and stakeholders. | <ul style="list-style-type: none"> • Completed process/ report that identifies specific impact areas and areas for improvement • Stakeholders view findings and recommendations as valid representation of impact. • Partners share findings throughout their organizations and stakeholder networks, as appropriate. |

Data Audit



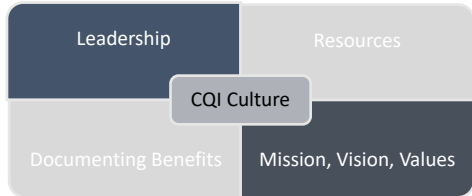
Q: What are we collecting as an organization and how does it map onto our priorities? Values? Where is there alignment and misalignment?

Data Audit



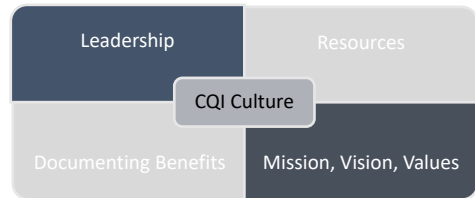
- Q:** What are we collecting as an organization and how does it map onto our priorities? Values? Where is there alignment and misalignment?
- A:** Data audit which reviews all strategic plans, logic models/ theory of change, priority maps, and compliance reporting to current data collection tools.

Data Audit



| Data Priority | Category | WHAT | HOW | WHO | WHEN | | | WHO | | |
|---------------|--|-----------------------------|----------------------------|---|----------------------------|--|--|---|---|--|
| | | ...tool collects this data. | ...is this data collected? | ...is responsible for collecting this data? | ...is this data collected? | ...is the data ready for analysis/reporting? | ...does this data need to be reported? | ...is responsible for collecting this data? | ...is responsible for entering this data? | ...is responsible for analyzing this data? |
| Priority #1 | Internal Priority | | | | | | | | | |
| Priority #2 | Compliance Need | | | | | | | | | |
| Priority #3 | Both Internal Priority & Compliance Need | | | | | | | | | |

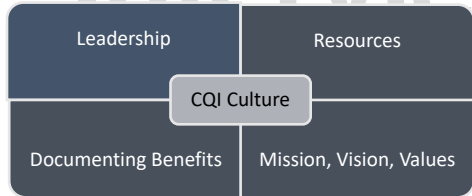
Data Audit



| Data Priority | Category | WHAT | HOW | WHO | WHEN | | | WHO | | |
|---------------|--|-----------------------------|----------------------------|---|----------------------------|---|--|---|---|--|
| | | ...tool collects this data. | ...is this data collected? | ...is responsible for collecting this data? | ...is this data collected? | ...is the data ready for analysis/ reporting? | ...does this data need to be reported? | ...is responsible for collecting this data? | ...is responsible for entering this data? | ...is responsible for analyzing this data? |
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| Priority #3 | Both Internal Priority & Compliance Need | | | | | | | | | |

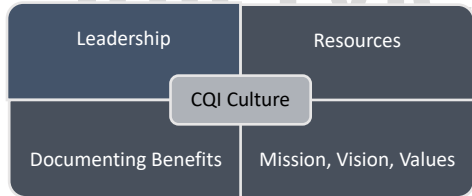
- **Where is there alignment?**
- **What gaps exist? What are the action steps needed to address them?**
- **What does an action plan and timeline for CQI look like, given the results?**

Consensus Building: Surveys & Interviews



How can we build consensus across groups when we get “stuck?”
How can I move the group forward in a way that honors everybody?

Consensus Building: Surveys & Interviews

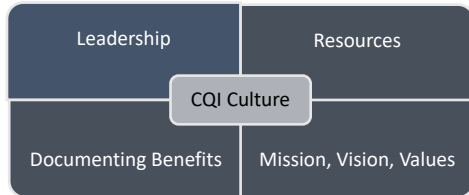


Q: How can we build consensus across groups when we get “stuck?”
How can I move the group forward in a way that honors everybody?

A: Use Data and Center Values to get “unstuck.”

- Consensus Surveys
- 1:1 Interviews
- Values alignment

Consensus Building



Thank you so much for your participation in the outcome mapping exercise! We conducted a thematic analysis of all goals and wanted to ensure we understand the highest priority goals across the organization its its stakeholders. Please review the goals below and then respond to the question prompts that follow. [For all goals below, data will be disaggregated across key equity variables identified in the process such as gender, race/ethnicity, and returning citizen status.](#) Thank you!

Goals:

1. Living Wage Job Placements
2. Living Wage Job Retention (6+months)
3. Increased placements to stable housing
4. Increase access to health foods
5. Access to educational support services (i.e., jobs training, GED).

Please rank order the goals below, with 1=Highest Priority.

- Living Wage Job Placements
- Living Wage Job Retention (6+months)
- Increased placements to stable housing
- Increase access to health foods
- Access to educational support services (i.e., jobs training, GED).

Please identify your relationship to ORGANIZATION:

There was also a discussion of the correct verbiage utilized in our mapping process. Please review the following goal statements and provide your open and honest feedback.

ORGANIZATION wants to end generational poverty, created and exacerbated by systemic racism, by creating a pipeline of wraparound services to support living wage job placements for the persons and families we serve.

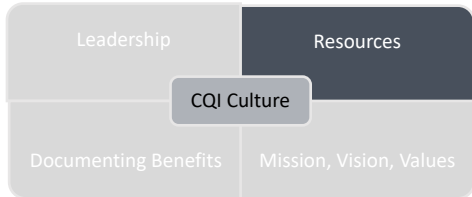
I agree with this goal and do not think it needs to be edited.

I generally agree with this goal, and while I think there may need to be some word smithing, I can live with it as-is.

I generally agree, but I have concerns about the wording and think it needs to be reworked before I can endorse it.

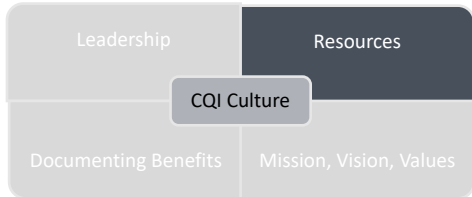
I do not believe this should be a goal.

Budget Review



Q: I created a priority map and understand what needs to be done; however, there is more work than I/my team can accomplish! How can we create clear expectations, as a function of current resources?

Budget Review



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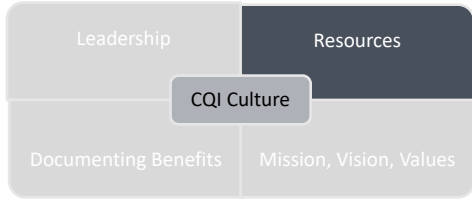
A: **Budget Review**

- Rule of thumb: 10% of budget should be allocated to evaluation, inclusive of personnel, overhead (i.e., technology investments), professional development, and consultants.

Time Analysis

- How much time is spent on what projects? What should be the expectations for any new projects?

Time Analysis



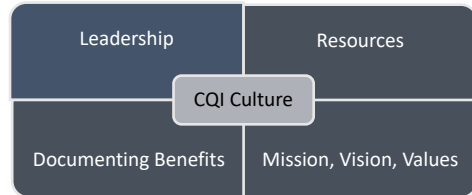
| | | | |
|--------|--------------------------------------|--|-----|
| 9/2/22 | PIE Org | Supervision | 2 |
| 9/2/22 | PIE Org | PIE Business Development - Calls and meetings, propos | 2 |
| 9/6/22 | SFF - NL Reads | Project Administration (Data collection and development, | 3 |
| 9/6/22 | JCC Chicago | Meeting (Prep & Follow up) | 1.5 |
| 9/6/22 | PIE Org | PIE Business Development - Calls and meetings, propos | 2 |
| 9/6/22 | PIE Org | Supervision | 1 |
| 9/6/22 | Illinois Humanities - EJ | Meeting (Prep & Follow up) | 1 |
| 9/7/22 | B'more Invested | Project Administration (Data collection and development, | 3 |
| 9/7/22 | PIE Org | PIE Business Development - Calls and meetings, propos | 4 |
| 9/7/22 | SFF - NL Reads | Project Administration (Data collection and development, | 3 |
| 9/8/22 | B'more Invested | Project Administration (Data collection and development, | 1 |
| 9/8/22 | South Chicago (Claretian Associates) | Meeting (Prep & Follow up) | 1 |
| 9/8/22 | PIE Org | PIE Business Development - Calls and meetings, propos | 2 |
| 9/8/22 | CRCL - PLC System | Meeting (Prep & Follow up) | 1 |
| 9/8/22 | PIE Org | Meeting (Prep & Follow up) | 2 |
| 9/9/22 | SFF - Organizational Development | Meeting (Prep & Follow up) | 2 |
| 9/9/22 | PIE Org | PIE Business Development - Calls and meetings, propos | 2 |
| 9/9/22 | B'more Invested | Project Administration (Data collection and development, | 4 |
| 9/9/22 | PIE Org | Supervision | 2 |

Hours - by Project/Activity

Select date range ▼

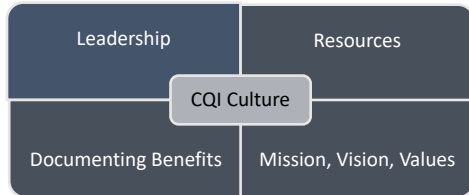
| | | | | | | | | Activity / Hours |
|-------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|-------|--------------|------------------|
| Project | Project Administr... | Meeting (Prep & F... | Reporting - analy... | PIE Administratio... | PTO: Vacation or ... | null | PIE Business | Grand total |
| SFF - NL Reads | 387.65 | 145.25 | 169.75 | - | - | 30.88 | | 739.78 |
| Covid School Wellness Init... | 485.45 | 115.5 | 31 | 2.5 | - | 21 | | 657.2 |
| CRCL - PLC System | 138.5 | 58.98 | 231.05 | - | - | - | | 440.53 |
| SFF - Organizational Devel... | 57.25 | 113.5 | 218.75 | 2.5 | - | 1.42 | | 393.42 |
| Cicero Community Collab... | 203.5 | 142.25 | 1 | - | - | - | | 347.75 |
| Health & Medicine | 84.2 | 69.98 | 65 | 1 | - | 4 | | 224.18 |
| Imerman Angels | 30 | 26.25 | 150 | 5 | - | - | | 211.25 |
| Bridges to Brighter Futures | 137.25 | 40.75 | 15.25 | - | - | - | | 193.25 |

Dashboarding



Q: How can I create a useable, easy to access CQI visualization with limited resources?

Visualization



Q: How can I create a useable, easy to access CQI visualization with limited resources?

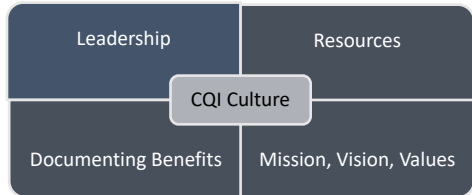
A: **Google Data Studio**

- Free, powerful dashboarding software
- Functions well with G-Suite

Canva

- Free, easy to use graphics software. Useful for external communication documents (i.e., fundraising) such as Infographics, Annual Reports, and Theories of Change.

Dashboarding



DEMO Example

SCHOOL DISTRICT

State Assessment
EXAMPLE REPORT USING FAKE DATA

SNAPSHOT

Average Percentile: 26.94
Total # of Tests: 1,524

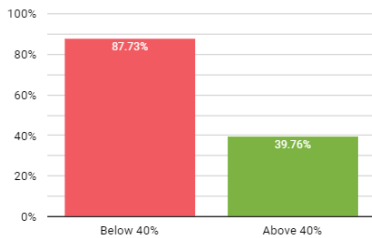
Subject:

School:

Teacher Name:

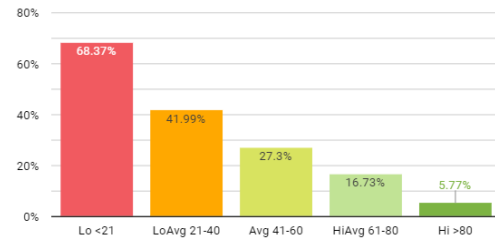
OVERALL

40th Percentile Status



| Position | N | % |
|-----------|-------|--------|
| Below 40% | 1,337 | 87.73% |
| Above 40% | 606 | 39.76% |

Quintile Distribution

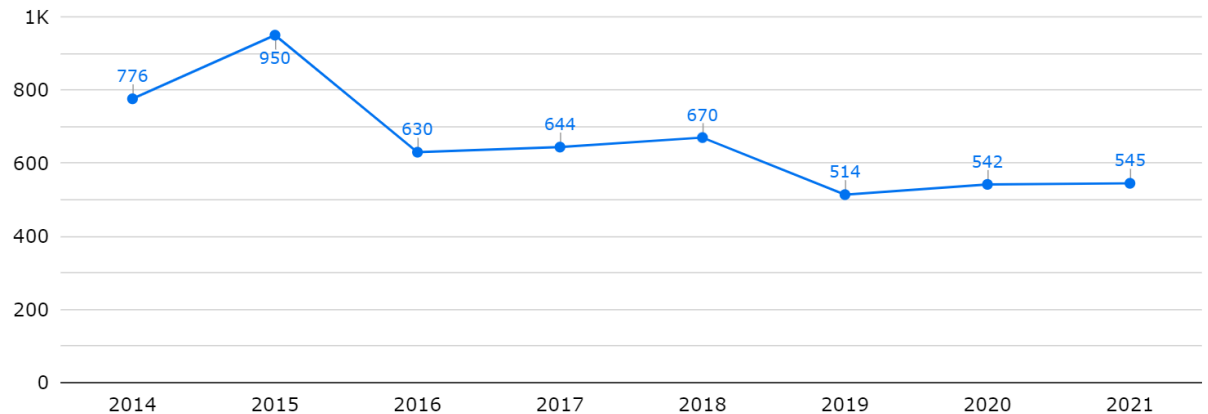


| Quintile Name | N | % |
|---------------|-------|--------|
| Lo <21 | 1,042 | 68.37% |
| LoAvg 21-40 | 640 | 41.99% |
| Avg 41-60 | 416 | 27.3% |
| HI Avg 61-80 | 255 | 16.73% |

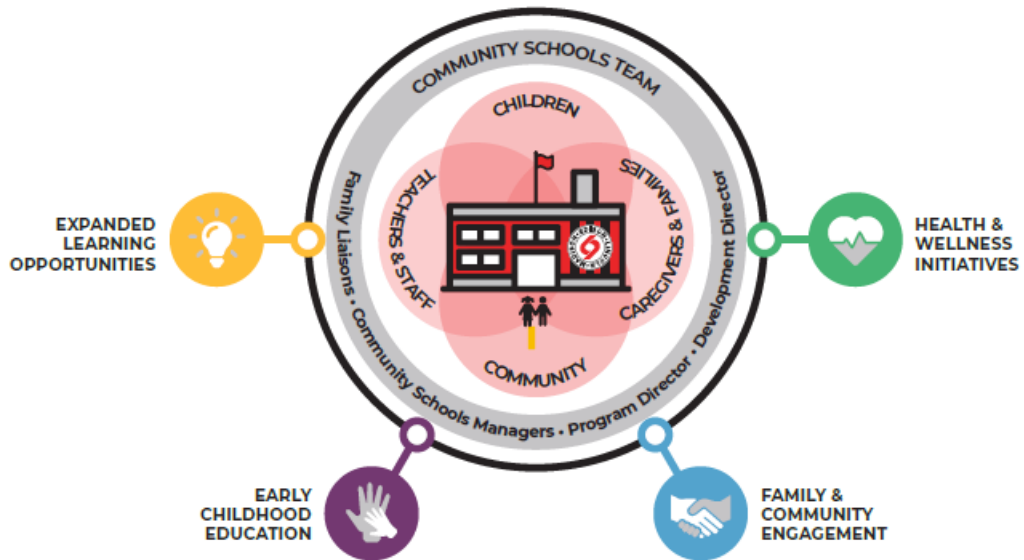
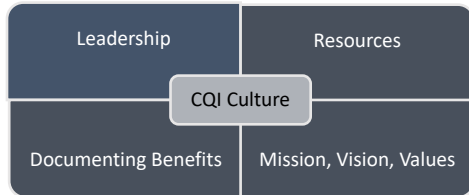
Total Number of North Lawndale Organizations and Businesses

*The graph below defaults to the total number of all organizations and businesses in North Lawndale; use the yellow drop down menu to the right to filter to look at specific types of organizations/businesses per year.

Select type of organization(s) or business(es)



Canva



Early Childhood Education

PRENATAL - AGE 5

178 Preschoolers
34 Home visiting families birth-age 3
4 Pre-K family events attended by **47** individuals

Health and Wellness Initiatives

OFFERING WRAPAROUND SERVICES

961 Snacks distributed during school
341 Physical and vision exams, immunizations, flu shots, and COVID vaccinations
131 Dental screening exams

Expanded Learning Opportunities

BEFORE, DURING, AND AFTER SCHOOL PROGRAMS

8,838 Books distributed to Pre-K to 6th grade students
492 Students enrolled in one or more after-school programs

Family and Community Engagement

CULTIVATING CONNECTIONS AMONG CAREGIVERS AND COMMUNITY STAKEHOLDERS

6 Family Liaisons
247 Holiday meals distributed
122 Caregivers connected through 7 ongoing parent groups

"By participating in the District's many family engagement programs, I have learned how to be there for my children and help them realize their full potential."
District 69 Parent

"I appreciate everything you did for me as a young man. You were truly my first inspirational black influence. You always pushed me to do better. And put me in my place when I would act out. Whether it was in the streets or in class you made sure that I got back on the right path."
Lincoln Junior High School Student, Men in The Making Program Participant

COVID-19 Response

MEETING THE NEEDS OF CHILDREN AND FAMILIES DURING THE PANDEMIC

\$10,000 Donated to provide free dental, vision, and mental health services to **34** students
142 Families provided e-learning and parent-teacher conference support and/or devices/hotspots
293 Free breakfasts and lunches delivered daily to **241** households

Small Group Activity

Discussion & Activation



Case Study

Small Group Activity

Get into groups of 2-4. Select somebody to share their current context and challenge with embedding and/or sustaining CQI at their organization. Using the framework, we have gone over today, think through how you might apply it to that situation. Use the handout(s) at your table. A few guiding questions can be:

- In what ways can organizational contexts be engaged to support the challenge?
- How might the strategies and tools/ practices be applied in this situation?
- Where does this framework fall short? What else is needed to solve this issue?

Checklist Pair & Share!



Using the framework, we have gone over today, think through how you might apply it to that situation. Use the handout(s) at your table. A few guiding questions can be:

- In what ways can organizational contexts be engaged to support the challenge?
- How might the strategies and tools/ practices be applied in this situation?
- Where does this framework fall short? What else is needed to solve this issue?

Share outs!



Now, find a group nearby you and share with them!
What did you all discuss? What solutions did you find?
What challenges did you uncover? What other questions
do you all have?

Questions

If you have any questions today, let's use the rest of our time today exploring them!

If you want to get a hold of me and ask a question later, please reach out to me at:



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