THE PQI GAMBIT:

TOOLS AND STRATEGIES FOR ENGAGING, TRAINING AND SUPPORTING STAFF
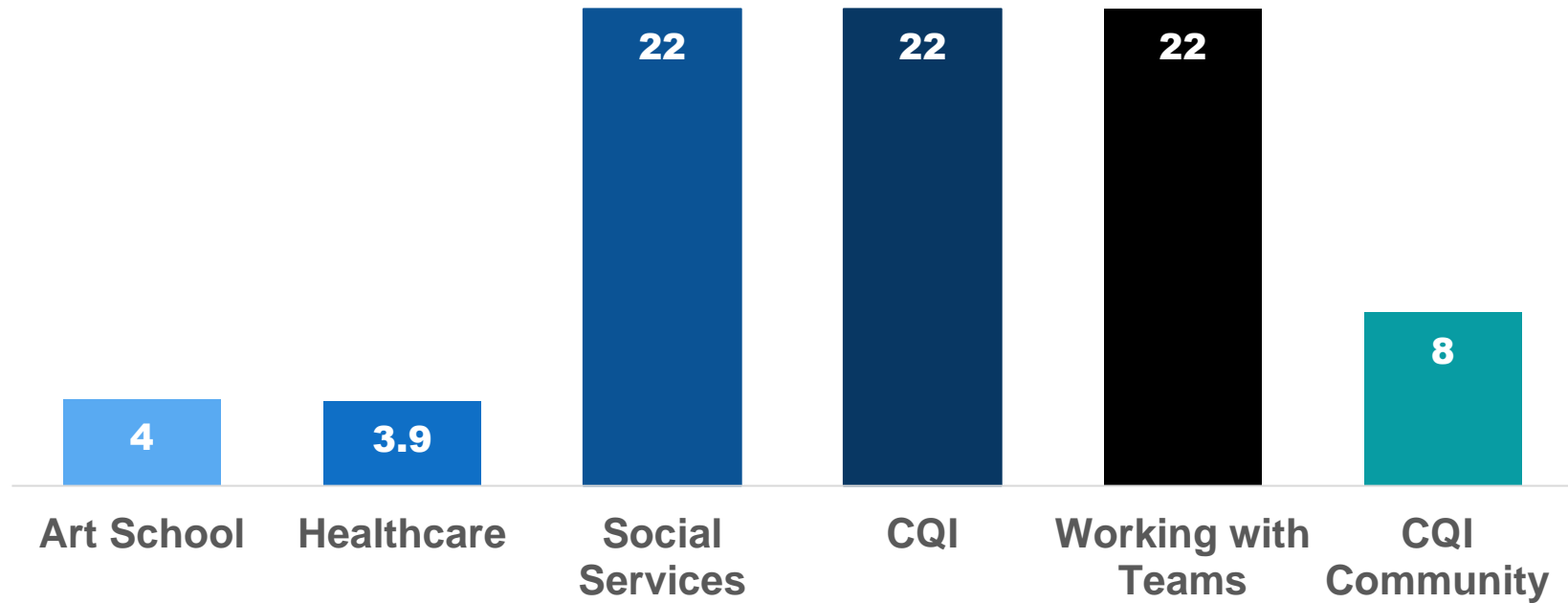
2021 Illinois CQI Community Conference
CQI is for Everyone

WHO AM I?

Melissa Curtis
Years of Experience

Art School	Healthcare	Social Services	CQI	Working with Teams	CQI Community
4	3.9	22	22	22	8

Lawrence Hall
Serving Children, Families and Communities Since 1865

Mission: Lawrence Hall is a community-based service agency embracing at-risk youth and their families by instilling resilience, healing and changing lives for good.

Vision: Hope, healing and resiliency for children.

Programs: Foster Care, Residential, Therapeutic Day School, Older Adolescent Program, Clinical Services, Expressive Therapies, and Youth and Community Development (Workforce Development, Mentoring, Juvenile Diversion)

WHO ARE YOU?

Polls

- **How many years have you been involved in CQI at your organization?**

- **Did you watch the TV show The Queen's Gambit?**

TAKEAWAYS

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

FORMING A QI PLAN AND STRUCTURE

WHAT IS YOUR ORGANIZATION'S DEFINITION OF QUALITY IMPROVEMENT?

INTRODUCTION

The agency's Performance and Quality Improvement (PQI) Program collects, analyzes, and utilizes data for the ongoing evaluation and monitoring of programs and departments, ensuring LH maintains the highest level of integrity and effectiveness in the way it serves the children, youth, and families in our care.

PHILOSOPHY

The agency's Performance and Quality Improvement (PQI) Program uses an **agency-wide, team-based approach** that measures, evaluates and analyzes data on program operations and outcomes to ensure that we are providing high quality and appropriate services to the children, youth, and families in our care.

The Performance and Quality Improvement program at Lawrence Hall provides the framework for all levels of staff to work together to pursue excellence and meet challenges within the agency and in child welfare. A Continuous Quality Improvement (CQI) model is used to evaluate and analyze data on processes, outputs and outcomes to advance effective service delivery and the achievement of strategic and program goals. The PQI program provides on-going learning and capacity development based on quality improvement philosophy and principles.

PQI PLAN: COMPONENTS

- **Structure and Responsibilities**

- **Stakeholders**

- **Measures and Outcomes**

- **PQI Operational Procedures**

- **Communicating Results and Feedback Mechanisms**

- **Confidentiality**

- **Future: Add in Data Equity**
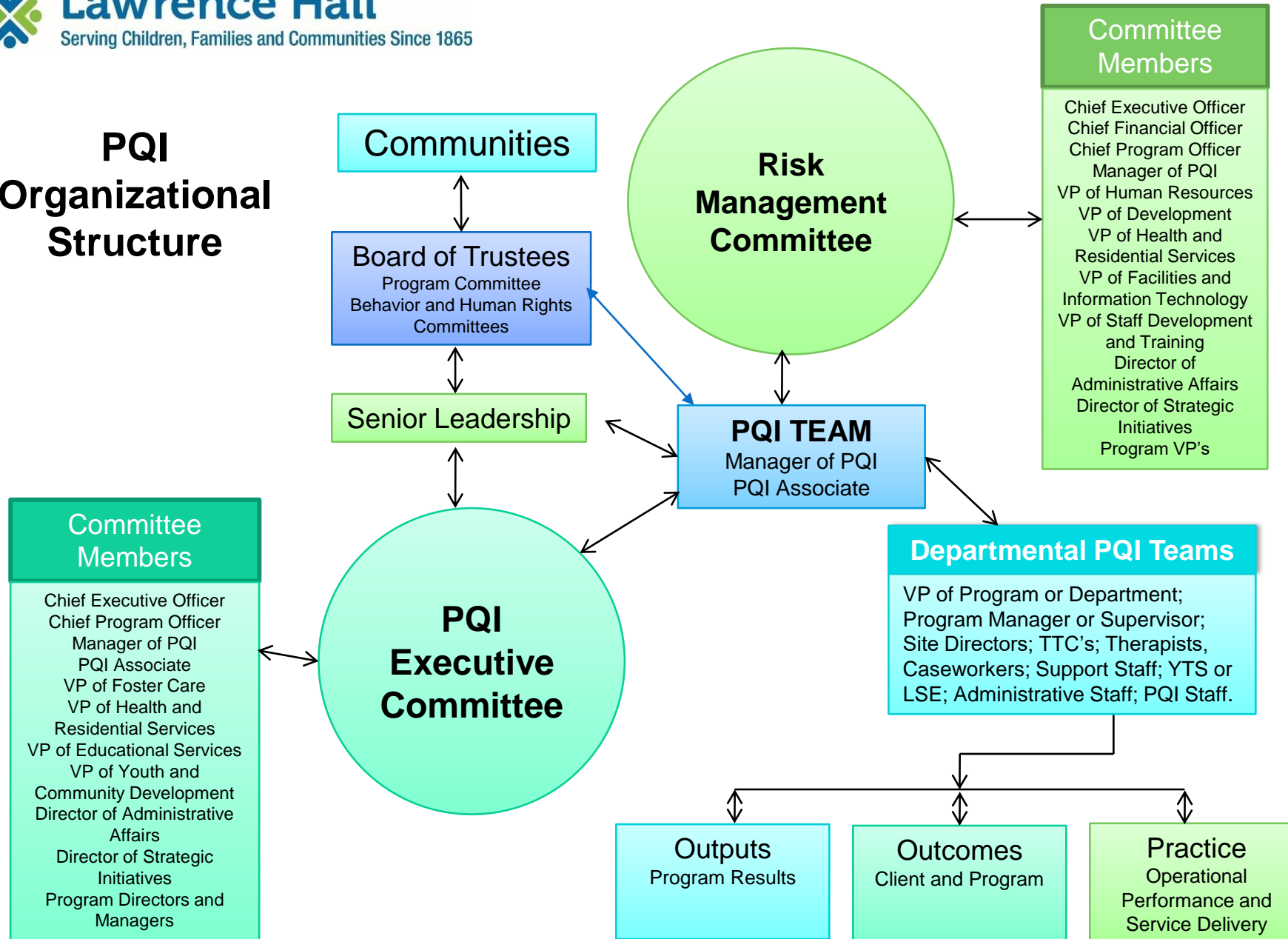
UNDERSTAND THE PLAYERS

BUILDING QI TEAMS

PROGRAM QI TEAMS

- **Size: how many people should serve?**

- **Roles: who should participate?**

- **Duration: how long should staff serve on teams?**

- **How: often will teams meet?**

- **This will depend on the program/department and the size of your organization**

EXPECTATIONS AND RESPONSIBILITIES

- Attend monthly meetings

- Develop performance measures

- Add data to reports as assigned

- Review reports prior to the meeting

- Discuss areas needing improvement

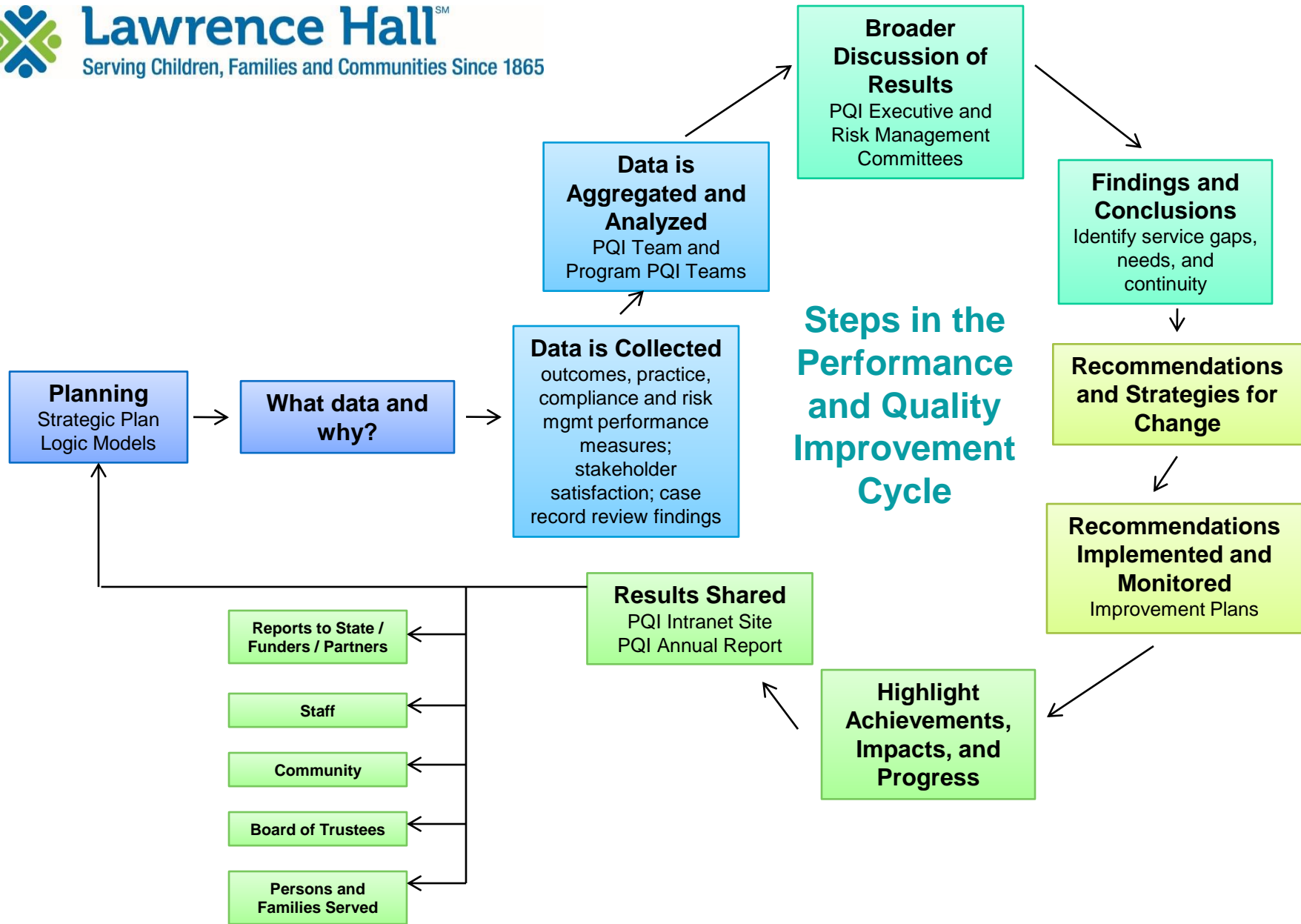- Share QI findings with the general team and bring issues from the team to QI

ONBOARDING AND ORIENTATION

CONTENT

1. What is QI?
2. What activities fall under QI?
3. What is the structure of QI?
4. The role of QI team
5. Share some QI data

FORMATS

- New Hire Orientation
- 1:1 Training
- Group Training
- Virtual

Lawrence Hall℠
Serving Children, Families and Communities Since 1865

Steps in the Performance and Quality Improvement Cycle

Planning
Strategic Plan
Logic Models

What data and why?

Data is Collected
outcomes, practice, compliance and risk mgmt performance measures; stakeholder satisfaction; case record review findings

Data is Aggregated and Analyzed
PQI Team and Program PQI Teams

Broader Discussion of Results
PQI Executive and Risk Management Committees

Findings and Conclusions
Identify service gaps, needs, and continuity

Recommendations and Strategies for Change

Recommendations Implemented and Monitored
Improvement Plans

Highlight Achievements, Impacts, and Progress

Results Shared
PQI Intranet Site
PQI Annual Report

Reports to State / Funders / Partners

Staff

Community

Board of Trustees

Persons and Families Served

QI PLAYBOOK: QI PLAN, STRUCTURE AND FORMING QI TEAMS

♟ **Piece A: PQI Plan**

♟ **Piece B: PQI Structure and Steps in Improvement Cycle Visuals**

♟ **Piece C: QI Orientation Presentation**

♟ **Piece D: Promoting A Quality Improvement Culture**

CREATE A BALANCE BETWEEN SKILL AND INTUITION

BUILDING STAFF CAPACITY IN QI

BUILDING CAPACITY: USE CREATIVE THEMES TO ENERGIZE STAFF TO ENGAGE IN QI

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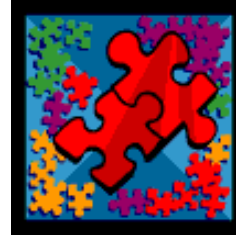
1. **Puzzle Pieces - Speaking PQI Language**
   1.1. Terms, definitions, key phrases
   1.2. Difference between outcome, output, process

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**

BUILDING CAPACITY: 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?

HAPPILY EVER AFTER??

You will find out what happened to our characters once I send you the QI Toolbox!!

BUILDING CAPACITY: WHY USE A LOGIC MODEL?

- Logic models help program leaders and staff see the way in which the individual pieces fit into larger program objectives and goals.

- Logic models are also helpful for keeping track of program activities, including both achievements and issues that arise during the life of the program.

- 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*.

W.K. Kellogg Foundation Logic Model Development Guide: Using Logic Models to Bring Together Planning, Evaluation, and Action (2004)

PROGRAM LOGIC MODEL
FY 2022
Mission Statement: WHAT WE BELIEVE

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

PROGRAM LOGIC MODEL MEASUREMENT

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

BUILDING CAPACITY: 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**
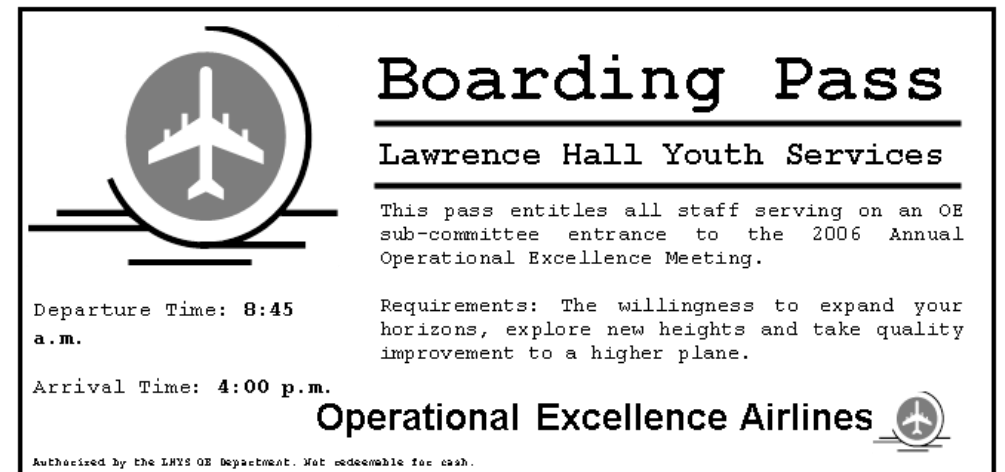
FLIGHT ITINERARY

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 your breakout room, you have 5 minutes to come up with a creative theme for a staff training. Choose ONE of the following topics (or choose your own):

1. Understanding client satisfaction results

2. Data Literacy

3. Creating improvement plans

4. Setting performance targets

5. Data analysis

WHEN IN DOUBT (AND WE ARE BACK IN PERSON), FEED THEM!

QI PLAYBOOK: BUILDING CAPACITY TO ENGAGE STAFF IN QI

♟ **Piece E: Key QI Terms and Definitions**

♟ **Piece F: Logic Model Training Tool**

♟ **Piece G: What happened to the Wizard of Oz Characters?**

♟ **Piece H: Flight Itinerary**

♟ **Piece I: Training theme ideas from the audience?**

PLAN SEVERAL MOVES AHEAD

SUPPORTING QI TEAMS AND STAFF

QI SURVEY FOR ALL STAFF

The QI Survey assesses:

- **Knowledge**
- **Effectiveness of QI**
- **Communication**
- **Training Needs**
- **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
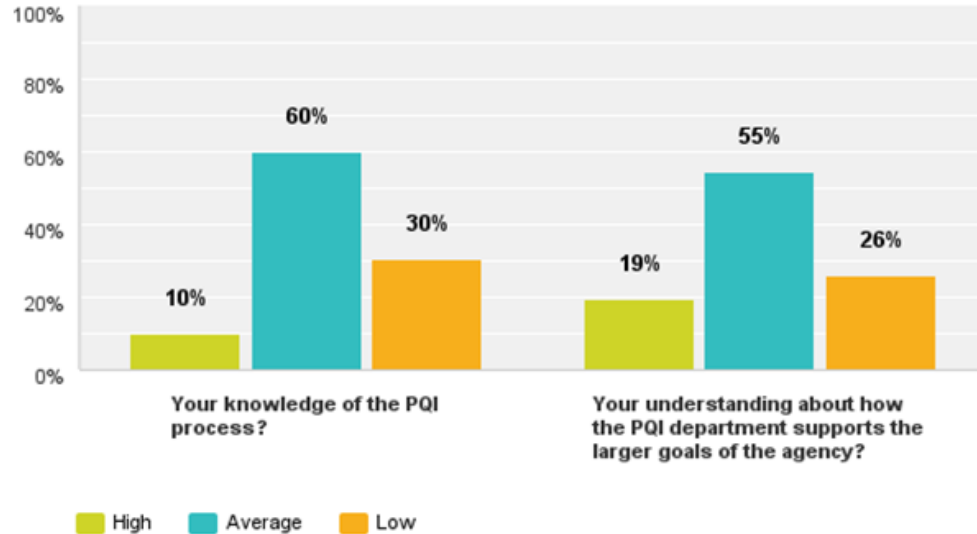
Q9 Please check the training and workshops that you would like to see the PQI department offer in the future (check all that apply):
Answered: 72   Skipped: 47
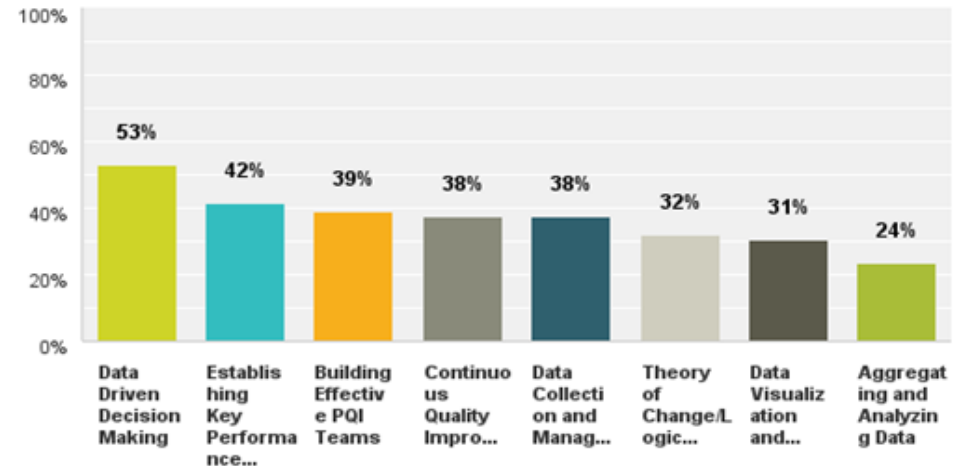
TIPS FOR A SUCCESSFUL QI MEETING

- **Decide duration: 60 to 120 minutes**

- **Monthly or Quarterly?**

- **SET AN AGENDA**

- **Materials sent 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**

- **Send out meeting notes within a week of the meeting**

- **Keep meeting notes simple and action focused**

SETTING THE AGENDA

What topics/data are included? How often? Who is responsible for setting the agenda?

- Program outcomes
- Service outputs
- Best practice or compliance indicators
- Client demographics
- Satisfaction survey data
- Staff retention data
- Improvement plan updates
- Risk management data
- External data reports

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

VIRTUAL ENGAGEMENT

- **Takes more planning!!**

- **Use simple icebreakers**

- **Poll Everywhere**

- **New Years PQI Resolutions: How do you see your quality improvement processes changing or evolving?**

- **Use a standard PowerPoint deck for the meetings**

POWERPOINT PRESENTATIONS

- **CQI concepts covered in our PQI Executive Committee virtual meetings over FY21: Data Literacy, Using Data, and Data Culture.**

- **Meeting on May 4, 2021…does anyone know the significance of this date?**

  - Theme: Star Wars/Data Culture

  - Icebreaker: If you could be any Star Wars character, what would you be?

  - Quote: "Good intentions aren't enough. They're not meaningless, but that is where we have to start, not where we end." Princess Leia

  - Create your own memes!

Watching the team freak out over something the data said would be a problem months go

Create your Own Meme for your Theme

CAN'T GO FROM INSIGHTS TO ACTIONS...

IF YOU DON'T HAVE A DATA-DRIVEN CULTURE.

DATA LITERACY

Definition

"Data literacy is the ability to read, work with, analyze and communicate with data. ... It's a skill that empowers all levels of workers to ask the right questions of data, build knowledge, make decisions, and communicate meaning to others."

QI PLAYBOOK: SUPPORTING QI TEAMS

♟ **Piece J: QI Survey Questions**

♟ **Piece K: Sample QI Meeting Agendas-Execs and Teams**

♟ **Piece L: Definitions of Data Literacy, Data Use and Data Culture**

♟ **Piece M: Sample Improvement Plan**

KNOW THE VALUE OF THE PIECES

COMMUNICATING RESULTS

COMMUNICATIONS AND REPORTING: QI SHAREPOINT SITE

QI SHAREPOINT SITE

Libraries:

- **Reports Library**

- **Annual Reports**

- **Logic Models**

- **PQI Forms and Policies**

- **Survey Results**

- **Meeting Minutes**

- **Reference Library**

STANDARDIZE PQI DATA DASHBOARDS

- **Measures: Outcomes, Outputs and Process/Compliance**

- **Improvement Plan**

- **Youth and Families Served plus Demographic Breakdowns**

- **Discharge Data**

- **Youth, Family and Program Success Stories**

- **Annual Narrative Questions**

  - Provide a brief summary of one the program's outcomes and how performance showed an evidence of change for youth and/or families.
  - Share one example of actions taken or improvements that have been made in response to data generated by your program over FY 22.
  - **How was tracking performance measures and outcomes affected by COVID 19?**
  - Describe at least 1 areas that you are currently targeting for improvement in FY 23.

ANNUAL PQI OUTCOME REPORT

How this report supports engagement with our stakeholders:

- This report is presented to our full Board annually.
- It is emailed to all staff.
- The full report plus each individual program page is uploaded to our PQI SharePoint site.
- This past year, I did 2 virtual meetings to present the report: one for supervisors and leaders, and one for all staff.
- The goal of doing these virtual presentations was to increase staff data literacy, promote a data culture and to celebrate our successes as an agency for FY20.

ANNUAL PQI OUTCOME REPORT

HOPE, HEALING, RESILIENCE

FY 2020

Lawrence Hall's mission and vision is to promote hope, healing and resiliency for children. In FY 2020, with the help of the PQI Executive Committee and the Think Trauma Training Team, we developed mission and vision driven questions to add to our youth satisfaction surveys. Unfortunately, COVID-19 became a reality shortly after we developed the questions and we were unable to get surveys out to all youth in programs in the 4th quarter. But, we were able to roll out these questions for the CFTC, OAP and TDS*.

HOPE

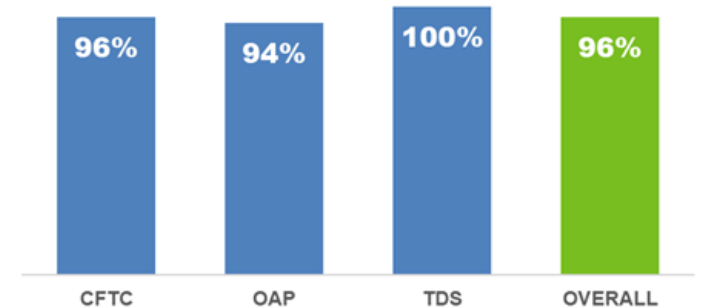**As a result of being at Lawrence Hall, I believe I will have a successful future.**

CFTC	OAP	TDS	OVERALL
96%	88%	88%	90%
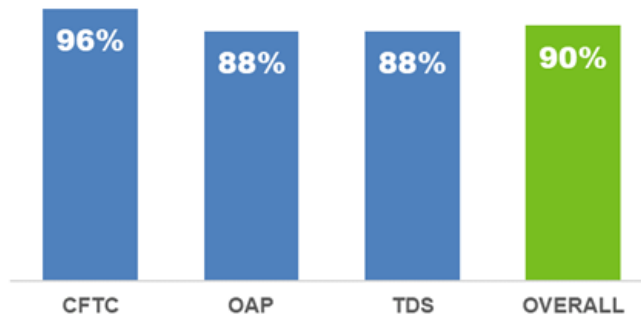
"Lawrence Hall has helped me with the confidence in order to progress in life."

Young Adult in the Older Adolescent Program

HEALING

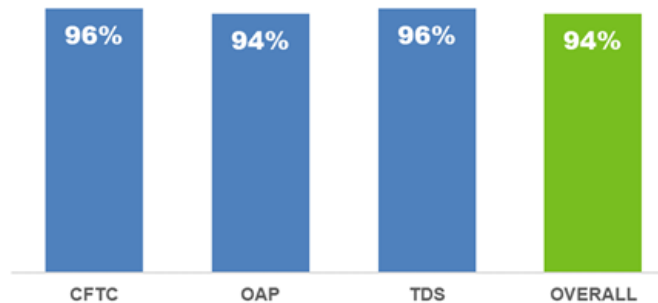**As a result of being at Lawrence Hall, I feel stronger and better able to tackle challenges.**

CFTC	OAP	TDS	OVERALL
96%	94%	100%	96%

RESILIENCE

As a result of being at Lawrence Hall, I have a better understanding how to manage the effects of challenges I experienced prior to being here.

CFTC	OAP	TDS	OVERALL
96%	94%	96%	94%

"Lawrence Hall has made a positive impact in my life by me learning how to use coping skills and to advocate for myself."

Youth in the Child and Family Treatment Center

"Lawrence Hall school helped me by changing my negative thoughts."

Student in the Therapeutic Day School

*85 youth/young adults filled out these questions in FY2020.

ANNUAL PQI OUTCOME REPORT

CHILD AND FAMILY TREATMENT CENTER FY 2020

Lawrence Hall's Child and Family Treatment Center (CFTC) provides care to adolescents traumatized by abuse and neglect. Youth and their families receive intensive therapeutic treatment that is strengths-based, family-focused, and outcomes-driven. There are three different programs in the CFTC: Behavior Disordered (BD), Sexual Behavior Problem (SBP) and Interim Care Coordination (ICC).
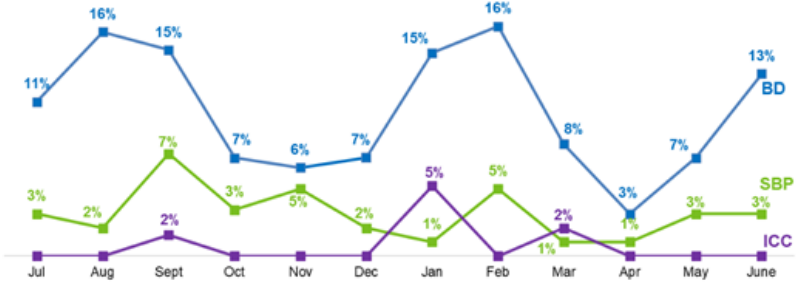
Youth Served

FY18	FY19	FY20
68	61	65
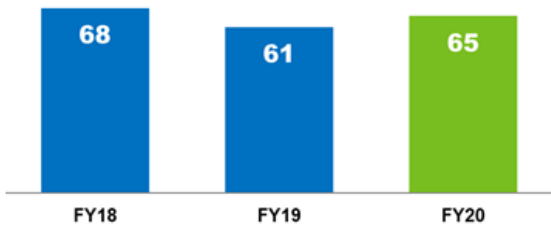
Placement Stability

77% of the Behavioral Disordered (BD) youth and **89%** of the Sexual Behavior Problem (SBP) program youth remained in placement on a daily basis.

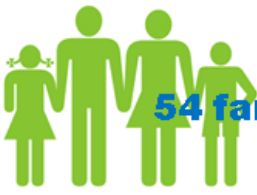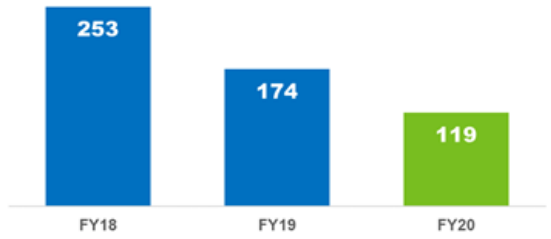|	FY18	FY19	FY20
SBP	98%	96%	89%
BD	86%	85%	77%
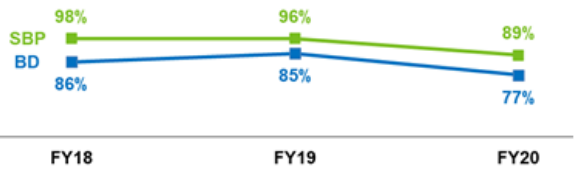
Placement Stability

Youth Elopement Rates in the Behavioral Disordered (BD) contract fluctuated, but stayed below the 41% high that the program started with in the beginning of FY18. Youth Elopement Rates in the Sexual Behavior Problem (SBP) and the Interim Care Coordination (ICC) program remained low.

BD: Jul 11%, Aug 16%, Sept 15%, Oct 7%, Nov 6%, Dec 7%, Jan 15%, Feb 16%, Mar 8%, Apr 3%, May 7%, June 13%

SBP: Jul 3%, Aug 2%, Sept 7%, Oct 3%, Nov 5%, Dec 2%, Jan 1%, Feb 5%, Mar 2%, Apr 1%, May 3%, June 3%

ICC: Sept 2%, Jan 5%, Feb 1%, Apr 1%

Restraint Reduction

Total number of restraints in the CFTC.
Over the past 3 years, the CFTC program has decreased the incidents of restraints by **53%**.

FY18	FY19	FY20
253	174	119

54 families served

Educational Progress

63% of youth made progress in their education by earning credits while living in the program.

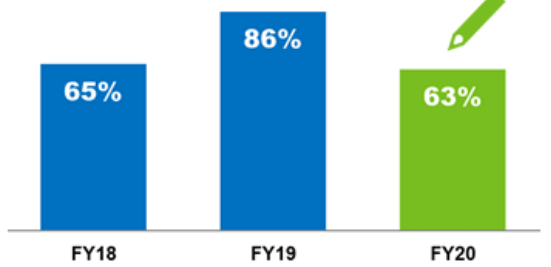| FY18	FY19	FY20
65%	86%	63%

Family Engagement

48% of youth maintained connections to family or a supportive network in the community. This was impacted by the COVID-19 shelter-in-place and as a result of both Lawrence Hall and DCFS implementing sysytem-wide restrictions on visitations.

FY18	FY19	FY20
56%	70%	48%
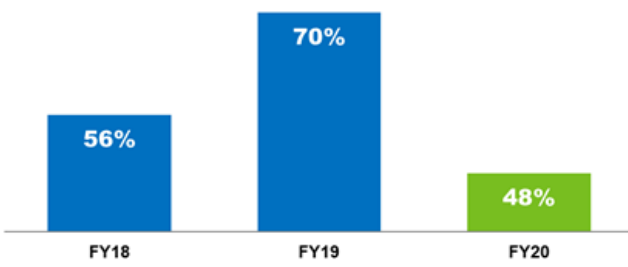
"They helped me better understand myself. I have developed a lot of skills such as being able to express myself and resolve conflict properly without anyone physically getting involved."
Residential Youth

Youth Satisfaction

90% of youth in Residential Services were satisfied with the overall care and quality.

FY18	FY19	FY20
85%	70%	90%

QI PLAYBOOK: COMMUNICATING RESULTS

♟ **Piece N: Sample Excel Dashboard**

♟ **Piece O: Annual Report Sample Page**

♟ **Piece P: Creating an Annual Report Tip Sheet**

<u>Fun fact:</u> there are 16 pieces on a chess board…I have added 16 pieces to your playbooks!

SPOILER ALERT!!

TEAM WORK MAKES THE DREAMS WORK

LEARN THE VALUE OF PATIENCE

- This work can be **TOUGH.**

- **QI staff** must be a magical combination of being relators, analyzers, creative problem solvers, communicators, counselors, and have infinite amount of patience while inspiring others to like math.

- **Sometimes, you can't play the plan, you have to play the board.** Recognize what is in front of you. Find the champions. Use the 2-4-2 Rule.

- **Don't rush to make a move, there may be a better one.** Step back and regroup. Assess your QI process. What can you control today?

- When I am having a frustrating QI moment, I remember one of my favorite quotes: ***"I put my head down and I let the work speak for itself." Michelle Obama***

MY FAVORITE QI RESOURCES

Ann Emery

https://depictdatastudio.com/

Poll Everwhere

https://www.polleverywhere.com/

Data Playbook

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

Icons for Everything

https://thenounproject.com/

KaiNexus

https://www.kainexus.com/

Data Therapy

https://datatherapy.org/

Survey Monkey

https://www.surveymonkey.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

Chess inspiration article: https://nairametrics.com/2020/02/15/12-lessons-on-business-strategy-from-the-game-of-chess/

THANK YOU!!

Melissa Curtis

Lawrence Hall

Chicago, IL

mcurtis@lawrencehall.org

*Coming together is a **beginning**.*
*Keeping together is **progress**.*
*Working together is **success**.*

Henry Ford