Tools to enhance your CQI work:

Applying a CQI approach to site recruitment challenges

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Plan for today’s session

• Review of CQI process: key takeaways from the fall webinar
• The challenge: site recruitment
• Understanding the problem
• Developing strategies
• Measuring the effectiveness of your strategy
• Questions
Who is on the call?

- Love Notes: 6
- Positive Prevention PLUS: 3
- Teen Outreach Program (TOP): 2
- Reducing the Risk: 1
- Other: 1
Poll: How comfortable are you with CQI?

• What’s CQI?
• I know of it, but I don’t think I’m doing it right and/or don’t know how to do it.
• I’ve lead or participated in CQI efforts, but I could use more information about how to do it effectively.
• I feel comfortable with it, but it always helps to learn more.
• I’m an expert in CQI!
Overview of the CQI process

• What is CQI?
• Program monitoring versus CQI
• CQI cycle
  • Create a team
• Plan
• Develop strategies
• Test
• Assess
• Implement
Poll: Where are you having site recruitment challenges?

- Schools
- Community-based organizations
- Faith-based organizations
- Other
- I’m not having site recruitment challenges. I’m here to contribute expertise!
What are the main barriers you’ve encountered in recruiting partners?

- Can't reach decision makers: 4
- Partner lacks capacity: 4
- COVID-related: 2
- District/state restrictions: 2
- Ideological barriers: 2
- Other: 2
Developing a specific aim

• **Challenge:** Site recruitment

• **Specific challenge:** We’re having trouble getting traction for the program in schools

• **Specific aim:** Develop agreements …. 
  - With at least two school districts (*achievable, realistic, measurable*)
  - In the five-county area (*specific*)
  - In the next six months (*time-bound*)
Understanding the problem

• In review: problem tree analysis
• A tool for documenting root causes, breaking down challenges
Understanding the problem

- Combating solutionitis
- Additional tools
  - Process map
  - Empathy interview
  - Root cause analysis tools
Tool for understanding the problem: Process maps

Example: What is the process for ordering a pizza with someone else?

1. Decide you want pizza
2. Decide on a pizza place
3. Decide on toppings
4. Agree?
   - Yes: Call the pizza place
   - No: Abandon the idea
5. Can you do half and half?
   - Yes: Pay for the pizza
   - No: Abandon the idea
6. Eat the pizza!
Process Map: Process for initial outreach to partners

1. Assemble your recruitment team
2. Conduct research to develop a list of schools, CBOs, health offices, faith-based sites, and so on
3. Initial contact:
   - Send an introductory letter about your program
   - Attend an event/meeting and distribute materials
4. Follow up with primary contact in one week
   - Interested?
     - Yes: Set meeting to discuss details
     - No: Gather feedback
Sample Questions:

- Are you focusing on all potential partners or just one subset (e.g., only public schools, only high schools)?
- Does your pitch explain how your program will help them to better serve students? Are you familiar with their needs? Have you identified the right decision maker?
- If you can’t reach the contact on follow-up, have you considered other stakeholders at the school who can help you? Are you reaching out at a convenient time to reach your contact?
- If the partnership doesn’t work out, do you have a process for gathering feedback about what didn’t work?

Process Map: Process for initial outreach to partners

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Conduct research to develop a list of schools, CBOs, health offices, faith-based sites, and so on

Initial contact:
- Send an introductory letter about your program
- Attend an event/meeting and distribute materials

If the partnership doesn’t work out, do you have a process for gathering feedback about what didn’t work?
Tool for understanding the problem: Empathy interviews

• **What?** Informal conversations to gather the perspectives of those involved with an issue

• **What makes an empathy interview different?**
  
  • Example: designing a better toothbrush
Tool for understanding the problem: Empathy interviews

- Think about whom you need to interview
  - In addition to typical users, think about the extremes
- Prepare for the interview
  - Although it’s an informal conversation, come prepared with a few questions
  - For a template, see an example from Stanford’s d.school
- Document key insights
  - What did you learn that provides useful information about the problem?
Understanding the problem: A few other tools

- Structured tools for digging into root causes
  - Fishbone diagram
  - The 5 “whys”
Understanding the problem: A few other tools

- Structured tools for digging into root causes
  - Fishbone diagram
  - The 5 “whys”

The 5 Whys

**Problem:** Can’t get in schools

1. **Why** - Lack buy-in
2. **Why** - Don’t feel it meets needs
3. **Why** - Leadership aren’t aware of extent of problem
4. **Why** - We haven’t communicated the extent of the need
5. **Why** - Add another if you need to go deeper
Discussion: Choose a tool

• Scenario #1: Statistics on teen pregnancy rates in your county demonstrate a need for teen pregnancy prevention programming. However, the prevailing attitude in the county is that you don’t talk about issues like teen pregnancy. What’s a tool we covered that you could use to inform improvement strategies?
Discussion: Choose a tool

- Scenario #2: Your team has trouble establishing partnerships. What tool might you use to strengthen your approach?
Developing strategies: Driver diagrams

Specific aim: Develop agreements to deliver programming in two school districts

Primary drivers:

- [Blank]
- [Blank]
- [Blank]

Strategies/change ideas:

- [Blank]
- [Blank]
- [Blank]

Adapted from Carnegie Foundation for the Advancement of Teaching
Developing strategies: Driver diagrams

Specific aim: Develop agreements to deliver programming in two school districts

Primary drivers:
- Trust and credibility
- Buy-in for specific programming
- Program flexible enough to adapt to partner's circumstances
- Effective outreach and messaging approach

Secondary drivers:

Strategies/change ideas:
Developing strategies: Driver diagrams

Specific aim: Develop agreements to deliver programming in two school districts

Primary drivers:
- Trust and credibility
- Buy-in for specific programming
- Program flexible enough to adapt to partner’s circumstances
- Effective outreach and messaging approach

Secondary drivers:
- Familiarity with organization and experience
- Common vision

Strategies/change ideas:
Developing solutions: Where to find ideas?

- Consult the literature/field
  - Check out Google Scholar, HHS.gov OPA TPP resource site, or the TPP19 toolkit
  - See [this resource](#) for tips on how to conduct effective literature searches
- Your staff
- Other practitioners/TPP grantees
Discussion: Practice developing drivers

Specific aim

Develop partnership agreements

Primary drivers

- Trust and credibility
- Buy-in for specific programming
- Program flexible enough to adapt to partner’s circumstances
- Effective outreach and messaging approach

Secondary drivers

Strategies/change ideas
Discussion: Practice developing drivers

Primary drivers

Secondary drivers

Strategies/change ideas

Buy-in for specific programming
## Measuring success: The four types of measures

<table>
<thead>
<tr>
<th>Type of measure</th>
<th>What they tell you</th>
<th>When to track</th>
<th>Walking through an example: Develop tailored talking points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process measures</td>
<td>Was the strategy implemented as intended?</td>
<td>While implementing your strategy</td>
<td># of site meetings in which staff came prepare with site-specific talking points</td>
</tr>
<tr>
<td>Primary driver measures</td>
<td>Are the process changes linked to interim outcomes?</td>
<td>Immediately after implementing strategy</td>
<td># of schools in which the team has cultivated at least one supporter/champion (building buy-in driver)</td>
</tr>
<tr>
<td>Outcome measures</td>
<td>Are we reaching our ultimate aim?</td>
<td>Post-strategy</td>
<td># of MOUs developed with school partners</td>
</tr>
<tr>
<td>Balancing measures</td>
<td>Did the strategy lead to any unintended impacts?</td>
<td>While implementing post-strategy</td>
<td>Interviews to reveal that creating talking points tailored to each site is labor intensive and takes away from other tasks</td>
</tr>
</tbody>
</table>

Adapted from Carnegie Foundation for the Advancement of Teaching
Discussion: Process measures

- **Challenge #1**: Potential partners lack openness to the idea of teen pregnancy prevention programming
- **Strategy #1**: Record former participants speaking to how they benefited from the program and share the video as part of your outreach materials.

**Primary driver**: Building buy-in

**Definition reminder**: Is the strategy being implemented as intended?

**Questions**:
- How will we know whether this strategy is being implemented as planned? What can we track?
Discussion: Primary driver measures

- **Challenge #1**: Potential partners lack openness to the idea of teen pregnancy prevention programming
- **Strategy #1**: Record former participants speaking to how they benefited from the program and share the video as part of your outreach materials.
- **Primary driver**: Building buy-in
- **Definition reminder**: Has our strategy helped us to make progress toward the primary driver that we’re targeting?
- **Questions**:
  - How will we know whether we’re building buy-in with potential partners?
  - Are there data we already have or new data we can collect to understand whether we’re building buy-in?
Discussion: Outcome measures

- **Challenge #2**: Potential partners often say they’re interested but don’t have the time
- **Strategy #2**: Shorten the length of sessions but increase the total number of weeks to implement in order to better fit a partner’s availability
- **Primary driver**: Flexibility in adapting to partner needs
- **Definition reminder**: Did we reaching our specific aim?
- **Questions**:
  - What should we measure to determine whether we reached our aim?
Discussion: Balancing measures

- **Challenge #2**: Potential partners often say they’re interested but don’t have the time
- **Strategy #2**: Shorten the length of sessions but increase the total number of weeks to implement in order to better fit a partner’s availability
- **Primary driver**: Flexibility in adapting to partner needs
- **Definition reminder**: Did the strategy lead to any unintended impacts?

**Questions**:
- What other parts of the program may be impacted by this strategy?
- What could we track to determine whether other parts of the program are being impacted?
Resources: CQI tools

The overall process
• Though focused on education, this free course from the University of Michigan and the Carnegie Foundation is broadly applicable and goes more deeply into improvement science techniques

Investigating the problem
• Empathy interviews
• Process maps: An overview
• More on design thinking (e.g., additional useful activities for brainstorming strategies and facilitating conversations about root causes):
  • Fishbone diagram template
  • 5 Whys template
Resources: CQI tools (cont.)

Developing strategies
- Driver diagram information and template

Measuring success
- Exit tickets primer
- Example of a PDSA sheet
Resources: Site recruitment

- Recruiting and retaining districts
- Recruiting and retaining schools
Tools: Online facilitation and process maps

- Facilitation
  - Mural
  - Miro
- Process maps
  - PowerPoint, Creatly, Lucid Chart
For more information

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Thank you!