Adapting Service Delivery in Response to Crisis and Uncertainty

ROOT CAUSE WEBINAR SERIES FOR SERVICE PROVIDERS
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About Root Cause

Root Cause is a nonprofit consulting group that exists to enable more people and families to achieve lifelong success.

Since 2004 we have worked with over 200 organizations on strategy, measurement, learning and improvement, and collective action in areas including health and well-being, education, and youth development, and economic security.
Today’s presenters

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Logistics

Root Cause Webinar

Use if you are experiencing technical problems.

Ask questions for the speakers to answer.
Ask questions for the speakers to answer.
A follow up email with resources, tools, slides, and the recording of today’s webinar will be sent out tomorrow.

Upcoming Webinars:
- May 6 - Financial Sustainability: The Consolidation in a Time of Uncertainty
- May 13 - Program Design: Adapting Service Delivery in Response to Crisis & Change

Register for webinars at rootcause.org
Welcome! Here’s what we’ll be covering together today...

- Introductions and Logistics
- Themes & Trends: What we’re hearing from service providers about program adaptation
- Managing Service Adaptation
  - Framework for Adaptation
  - Monitoring Service Quality
  - Process for Iteration & Learning
- Q&A
- Resources & Tools

rootcause.org
Attempting to meet current needs when for some there’s an uptick in service demand and for others services can’t continue at all - and many are somewhere in between.

Organizations are making changes that they’ve wanted to do for a long time, and are in constant motion to adapt and keep up with shifting circumstances.

Seeking a balance between making short-term adaptations and attending to long-term implications, strategies, and mission alignment.

Navigating service participant engagement in a virtual delivery setting, and/or when virtual options are limited or unavailable

Approaches to engaging with and supporting specific populations during this time (e.g. elders, youth, students, domestic violence survivors, job-seekers, etc)

Strategies for supporting, inspiring, and reassuring staff and volunteers – both now and when in-person services ramp back up.
Key Considerations for Managing Service Adaptation

- Identify and support an evolving set of immediate needs of program participants, their families/communities, and program staff members.

- Make shifts that can serve both short- and long-term service goals.

- Invite contribution and feedback through creative means – none of us is the expert in these circumstances!

- Prioritize real-time feedback, data, and meaning-making.

- Create a simple, useful process for managing adaptation that allows for iteration, learning, and quality improvement over time.
Managing Service Adaptation

Framework for Adaptation
“In a non-linear process, everything is part of the learning, every step. That includes constructive criticism, it is part of the feedback loop -- experiment, gather feedback, experiment again. This is how we learn.”

adrienne maree brown, *Emergent Strategy*
A Framework for Adaptation

Process for Iteration & Learning

Needs
- Identify needs - new? Same? Both?
- Assess org’s ability to address needs
- Solicit input from partners and service participants to learn about needs

Service strategy/activities
- What services currently look like
- Ability to address needs through services
- Link to service goals
- Link to funder requirements
- Virtual service delivery

Measures
- Measures of progress towards service goals
- Data collection needs and methods
- Changes to accommodate virtual service delivery

Goals
- Service aims during COVID-19
- Relationship between current goals and target program outcomes
- Balancing short-term and long-term service goals

Long-term impact
- Implications of short-term service changes for achieving long-term impact
- Innovations that can be applied long-term to advance impact
- Communication with funders & partners for sustainability

Mission alignment!

In the follow-up materials, look for a handout called “Framework for Service Delivery Adaptation”
Managing Service Adaptation

Monitoring Service Quality
For overall service quality, consider:

**What is different now?**

**What needs the most attention from our team?**

**How are we delivering quality in this area with consistency under current conditions?**

**What can be improved in the short-term to bring us into greater alignment with our goals?**

### Monitoring Service Quality During Adaptation

<table>
<thead>
<tr>
<th>Category</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessibility</td>
<td>E.g. addressing barriers to services &amp; supports</td>
</tr>
<tr>
<td>Family Engagement</td>
<td>E.g. including clients (and/or their families) in shaping services</td>
</tr>
<tr>
<td>Referrals &amp; Partnership Management</td>
<td>E.g. referral practices and partnership/coordination across services</td>
</tr>
<tr>
<td>Staff Support &amp; Performance</td>
<td>E.g. practices &amp; policies that enable staff to do their best</td>
</tr>
<tr>
<td>Trauma-Informed Practice</td>
<td>E.g. integrating of trauma-informed care principles &amp; practices</td>
</tr>
<tr>
<td>Use of Evidence</td>
<td>E.g. incorporating research &amp; evidence-based models/approaches</td>
</tr>
<tr>
<td>Performance Measurement</td>
<td>E.g. systems and structure to collect data and monitor performance</td>
</tr>
</tbody>
</table>

In the follow-up materials, look for a handout called "Monitoring Service Quality During Adaptation"
Managing Service Adaptation

Process for Iteration & Learning
We’ve changed our service delivery approach (and we keep adjusting it) - now what?

1. Get clear on goals/aims
2. Collect relevant data
3. Take time to review the data
4. Make meaning of your information (what does our data tell us? What can we conclude?)
5. Adjust the approach based on our learning (then return to step 1!)

To Do This, We’ll Need:

- A group of team members to help out
- A common place to document aims, measures, and learnings
- Agreement on what data to collect and how
- Regular opportunities to review data and discuss next steps
Plan-Do-Study-Act (PDSA)

**PLAN:** Get a small team together and develop the approach
- What is our goal?
- How will we do it?
- How will we know if it worked?

**DO:** Implement the plan and collect the data you need in order to understand if it worked

**STUDY:** Look at the results together and make meaning of your data
- Did we achieve our goal?
- What did we learn?
- What worked? What didn’t?

**ACT:** Decide what to do next
- Continue this new way of working?
- Change it?
- Try something totally different?

Many of you might already be here!
Using Feedback and Data for Iteration

- Prioritize real-time feedback, data, and meaning-making
- Engage service recipients and staff in shaping service adaptation by actively seeking input and feedback – and strengthen relationships in the process
- Find the data and feedback that allows us to answer:
  - How do we know if this is working? What could be better?
  - What are we missing? Who are we missing?
  - If we change something about our services, how will we know if it is an improvement?
- Prepare to be able to tell the story of what we attempted, what we learned, which methods works, and what we want to keep doing
- Communicate this data-driven story to funders, partners, and other stakeholders to persuasively make the case for continuing to use/adapt innovations long-term
Gathering Real-time Feedback and Data

Identify practical, ready-to-implement approaches to getting feedback from both service recipients AND program staff:

- ex: Phone-friendly simple surveys, brief virtual focus groups, 1-2 questions to ask clients at the end of a regular call/email/text exchange, questions for staff in a regular team call

Choose questions that will help lead to tangible improvements, for example:

- [For service recipients] What is helpful about this new way of working together? What could be better?
- [For direct service staff] What is working and/or not work about delivering services in this new way?

Adjust approaches based on the population served

- consider access to and skills with using technology, comfort level with virtual options, availability of internet, and other factors

Determine and clearly communicate where to capture feedback and data in a common place for regular review and discussion by the team

- ex: shared google spreadsheet, accessible online database, spreadsheet in Dropbox or other cloud-based storage platform
Key Considerations for Managing Service Adaptation

- Identify and support an evolving set of immediate needs of program participants, their families/communities, and program staff members
- Make shifts that can serve both short- and long-term service goals
- Invite contribution and feedback through creative means – none of us is the expert in these circumstances!
- Prioritize real-time feedback, data, and meaning-making
- Create a simple, useful process for managing adaptation that allows for iteration, learning, and quality improvement over time
“Everything we attempt, everything we do, is either growing up as its roots go deeper, or it’s decomposing, leaving its lessons in the soil for the next attempt.”

adrienne maree brown, Emergent Strategy
Q&A
Resources

What is Quality? https://rootcause.org/insights/field_notes/what-is-quality/


Stay Connected!

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