



Strengthening Performance Measurement and Data Capacity

Improving Program Quality During the Pandemic and Beyond

January 26, 2021

About Root Cause

WHO WE ARE

Root Cause is a nonprofit consulting team that helps drive transformative social change.

WHAT WE DO

Since 2004, we've helped over 400 partners strengthen their 1) Strategy, Design, & Implementation, 2) Collective Action 3) Continuous Learning & Improvement, and 4) Facilitation & Convening.

WHY WE DO IT

Our mission is to be a transformative partner in building, improving, and sustaining social change initiatives that enable all people to thrive. We help nonprofits, public agencies, and philanthropies achieve their goals while advancing racial equity and justice.



Agenda

- Welcome
- Program Quality Roadmap
- Data and Measurement Best Practices
- Role of Continuous Quality Improvement
- Wrap Up



Program Quality Roadmap



FOUNDATIONAL CONDITIONS:

- Organizational Mission & Vision are driven by an authentic understanding of community needs and strengths.
- Organizational Commitment to Racial & Economic Equity.
- Alignment between Organizational Mission & Vision and Program Outcomes.
- Organizational & Leadership Supports supply tangible and intangible resources.

What is Data and Measurement Capacity?

Data and measurement capacity refers to an organization's ability to **track, analyze, and make meaning of important program and operational data**, which allows the team to learn about what is working and what can be improved to advance program goals.

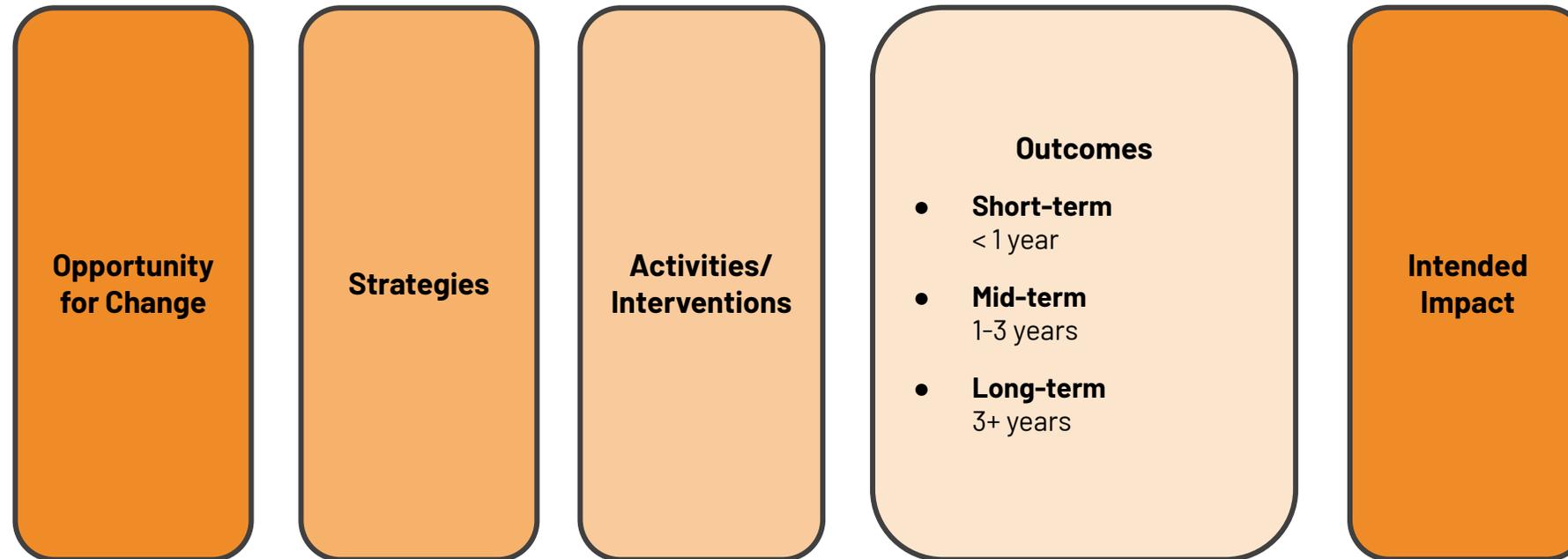
Measurement allows nonprofits, funders, and other agencies to:

- **Track progress** towards intended outcomes
- **Ensure programs** are being implemented as designed
- **Unearth** new areas and **avenues of improvement**
- **Communicate success and progress** to funders and partners, and
- **Gain new insights** over time about what works.



Establishing Data and Measurement Capacity

- **Develop a framework** which articulates the organization's goals and vision of success, what activities and operations it currently performs, and a cycle of measurement, learning, reporting, and improving



Establishing Data and Measurement Capacity

- **Increase data management, analytic, and evaluative capacity** by investing in staff capacity.
 - **Be clear** about staff data responsibilities and provide training.
 - **Build staff knowledge and skills** to locate, appraise, and interpret research evidence.
 - **Invest in the team and systems you need**, including human, fiscal, and structural capacity in order to implement the intervention with fidelity.
 - **Assess data quality and processes** on a regular basis. Systems, training, and quality reports are not a one-time investment.



Establishing Data and Measurement Capacity

- **Establish an organizational culture of learning** embraced by leadership that prioritizes time and resources to reflect on and use data, and include staff at every level.
 - **Determine right data to be monitoring** beyond meeting compliance requirements or funder expectations
 - **Develop the reporting tools that benefit multiple stakeholders** including program staff, leadership, external audiences
 - **Disaggregate data** by race, ethnicity, and income to reveal disparities that may be hidden by aggregate data, and support solutions targeted at reducing those disparities.
 - **Monitor** the success of the intervention and adjust when needed.



Continuous Quality Improvement (CQI) Cycle

- Propose "experiment" & hypothesis
- Identify roles & resources
- Define time frame & measures of success



- Prepare to implement plan
- Implement the plan
- Collect documentation & data

- Adopt successful practices
- Make adjustments
- Determine what more needs to be done and/or learned

- Track, analyze, share results
- Identify adjustments
- Identify & celebrate learnings & successes

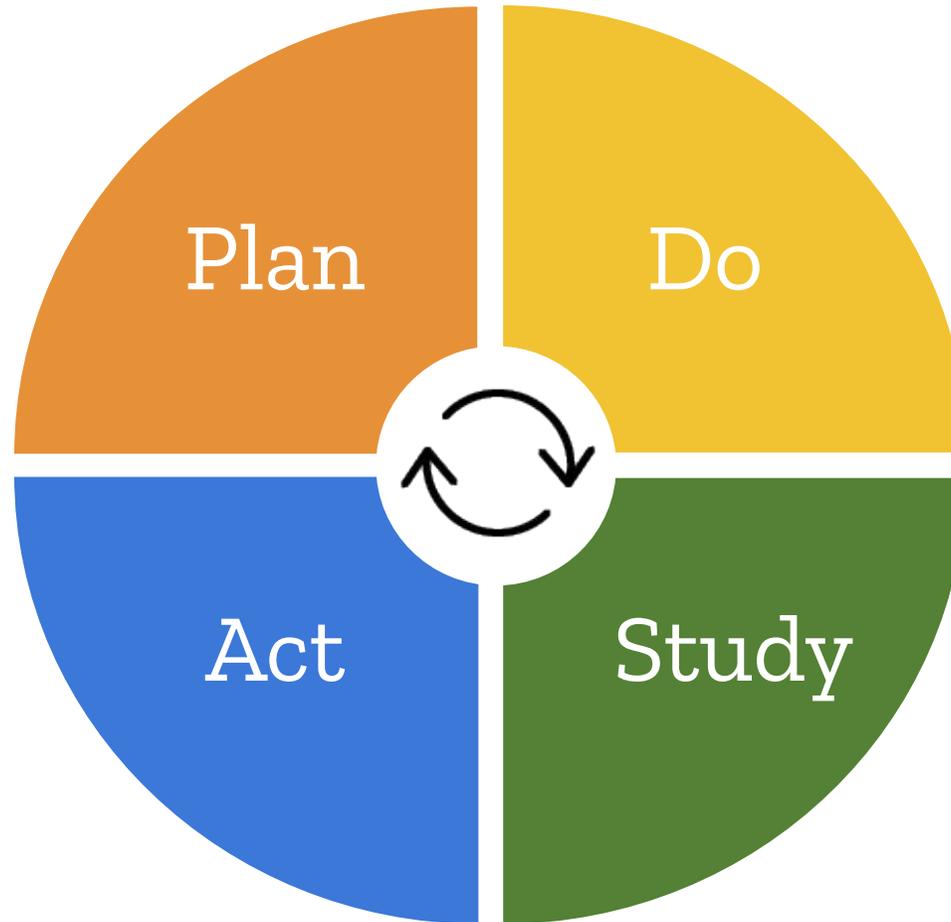
Referrals & Partnerships: CQI Goal

Understand the effectiveness of referrals to community resources by learning whether students take action on the referrals given, what actions the receiving organizations take to engage students, whether students enrolled in services, and their satisfaction with services or their reasons for choosing not to participate.



Referrals & Partnerships: CQI Process

- Developed referral follow-up protocol and data tracking sheet to learn about referrals from both students and referral partners.
- Decided to 1) engage leading referral partners to identify how to work together more effectively and 2) develop and test use of an "after-visit summary" in the next cycle to connect more quickly with students.



- Collected data on all referrals made over a three-month period via phone calls/texts with students and the corresponding agencies that received the referrals.
- Analyzed data to match responses from students with the receiving service provider to understand "both sides of the story." Identified the primary reasons referrals didn't result in enrollments.

Trauma Informed Approach (TIA): CQI Goal

Ensure all organization staff have a consistent base of knowledge about the impact of trauma on brain development in order to improve interactions with students/families and that management has an understanding of what additional trauma TIA training and/or resources staff need.



Trauma Informed Approach: CQI Process

- Provide training on TIA so all staff have a consistent base of knowledge; understand need for additional training and resources.

- Based on feedback from staff, TIA training will be formally integrated into staff onboarding processes and staff will receive in-depth training from external experts in Cycle 2.



- Delivered training on TIA for 66 program staff. Developed pre- and post-program surveys to gauge increase in knowledge & need for additional resources.

- Post-training surveys showed an increase in knowledge about TIA, as well as a desire for more in-depth training specifically how to apply practices when working with students/families.

Why Do Continuous Quality Improvement?

*“The reality for most programs is that they need to balance a desire for self-determination with a very real need to comply with the standards of their funding or accrediting entity. **Adopting a CQI approach signals a shift** from a focus on simply complying with standards imposed by external systems to **an internally motivated culture of reflection, curiosity, ongoing learning, and commitment to high quality.**”*

*At the heart of organizations that successfully embrace CQI are **transformational leaders** who practice change management skills such as inclusive communication, team approaches, and using data to inform goals and quality improvement plans.”*

Source: BUILD Initiative. *Continuous Quality Improvement in Early Childhood and School Age Programs: An Update from the Field.* June 2017.

Adjusting During Challenging Times

- **Revisit and set realistic outcomes and targets** which may be focused on sustaining or just engagement.
- **Plan short cycles** to collect specific data to understand quickly what changes are working and what needs to be adjusted.
- **Gather feedback from those you serve** regularly with a few questions in various formats (in-person, during check-in meetings, text); this is different than an annual stakeholder survey or post-event surveys you conduct.
- **Use data as well as specific examples/stories** to be transparent with individuals, funders, partners about the adjustments that have been made and how great the challenges continue to be during the pandemic.
- **Assess whether changes to programming should be adopted**, using data and stakeholder feedback, because they improve the quality and ease of services



Wrap up

- Visit rootcause.org to access the Performance Measurement research briefs, case studies, and resources
- Connect with **Root Cause** at rootcause.org/contact-us
- Connect with our Moderators:
 - **Erin Rodriguez** (erodriguez@rootcause.org)
 - **Colette Stanzler** (cstanzler@rootcause.org)

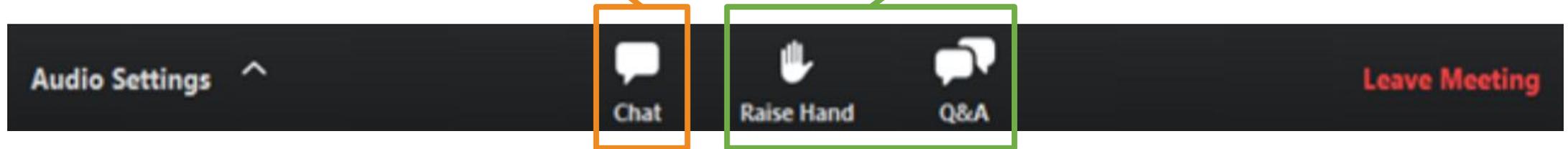


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Thank you!

Webinar Logistics

- **Share your name, pronouns** (*if comfortable*), **organization, and city in the chat.**
- Use the chat if you are experiencing any tech issues.
- Share thoughts and comments about the discussion!
- **Type questions** in the the Q&A during the webinar.
- **Raise your hand** during the Q&A sessions to ask your question out loud to the group.



Welcome & Introductions



Erin Rodrigues
Executive Director, Root Cause
she/her/hers



Colette Stanzler
Principal, Root Cause
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All of you!