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The banner features a blue background with white and yellow text. On the left, it reads "POLICY ACADEMY FOR INNOVATIVE EMPLOYMENT STRATEGIES". In the center, it says "January 7-9, 2019" with a yellow arrow icon, followed by "Kickoff Meeting" and "Renaissance Arlington Capital View Hotel • Arlington, VA". On the right, there are two photographs: the Washington Monument and the Jefferson Memorial. Logos for the Administration for Children & Families and the Office of Family Assistance are also present.

OFFICE OF FAMILY ASSISTANCE  
An Office of the Administration for Children & Families

ADMINISTRATION FOR CHILDREN & FAMILIES

POLICY ACADEMY FOR INNOVATIVE EMPLOYMENT STRATEGIES

>> January 7-9, 2019

**Kickoff Meeting**

Renaissance Arlington Capital View Hotel • Arlington, VA

## Successfully Implementing Programmatic and Systems Change

**Michelle Derr**  
**Angela Rachidi**

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The banner features the Department of Health & Human Services logo on the left. To its right is the text 'ADMINISTRATION FOR CHILDREN & FAMILIES'. Further right is the 'OFFICE OF FAMILY ASSISTANCE' logo, with the subtitle 'An Office of the Administration for Children & Families'. The main text on the banner reads 'POLICY ACADEMY FOR INNOVATIVE EMPLOYMENT STRATEGIES' in a light blue box, followed by a yellow arrow icon and 'January 7-9, 2019'. Below this is a dotted line, then 'Kickoff Meeting' in large white text, and 'Renaissance Arlington Capital View Hotel • Arlington, VA' in smaller white text. On the right side of the banner are two photographs: the top one shows the Washington Monument at dusk, and the bottom one shows the Jefferson Memorial.

## Successfully Implementing Programmatic and Systems Change

**Damon Waters  
(Moderator)**

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# **Successfully Implementing Programmatic and Systems Change—Opportunities to IMPROVE**

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**Presentation to the Office of Family Assistance  
Policy Academy Grantees  
Tuesday, January 8, 2019**

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Michelle Derr • Angela Rachidi

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# What fuels people's passion...

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- Relationships with customers and our co-workers
- Own experiences growing up
- Racial equity and social justice
- Changing the client experience
- “Don’t teach people the process for coming in, teach them the process for leaving (successfully.)”
- Seeing families grow!

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# **Your experience with implementation...**

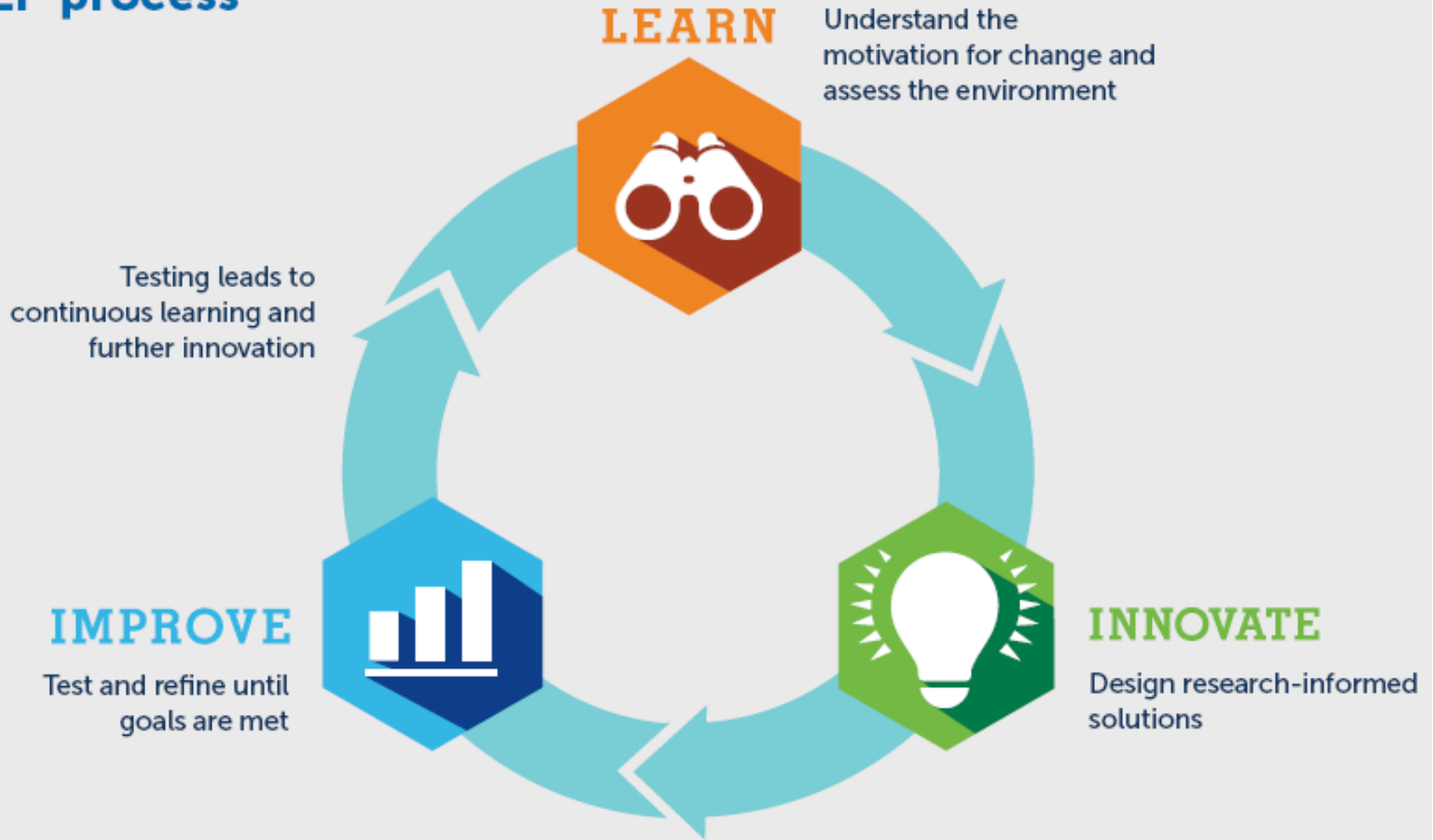
# What can go wrong with implementation?

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- Programs entrenched in a transactional, compliance-driven approach are resistant to change
- Policies, procedures, and performance measures are not well-aligned with the change, creating mixed messages for staff and customers
- Complicated business processes consume staff resources and complicate service delivery
- Reactive rather than intentional program leadership

# Learn, Innovate, Improve (LI<sup>2</sup>) Framework

## The LI<sup>2</sup> process



# Why use this approach?

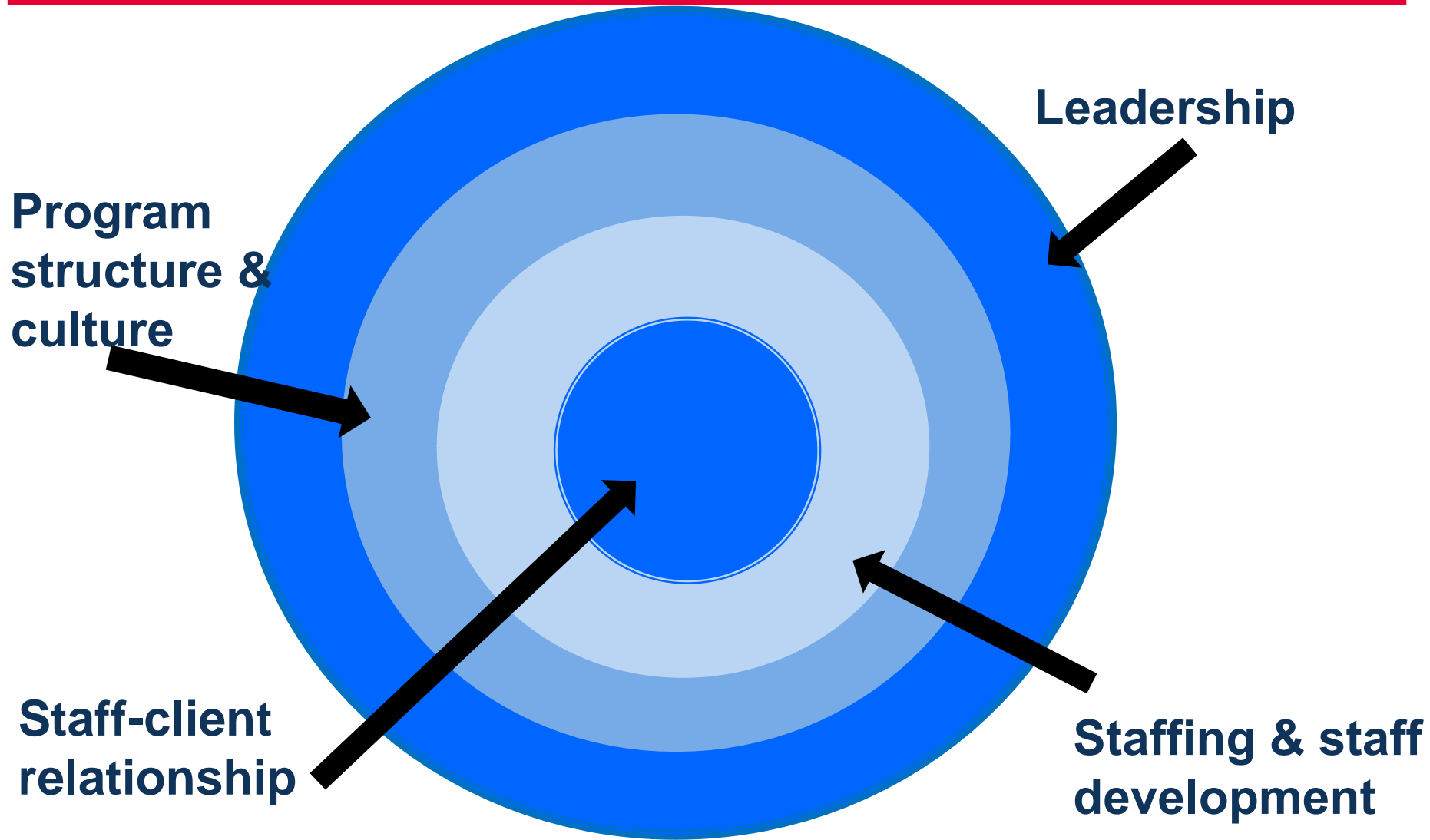
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- The ultimate value of using these methods is to test and build evidence for practitioners to make everyday decisions
- Many of these methods can and have been used by practitioners as a continuous quality improvement strategy
- With time, these efforts will help provide Evidence for the field
  - For example, Jefferson County, CO, TANF program is being include in a randomized controlled trial



# Holistic approach to implementation

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# Preparing for the Improve stage: Learn

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- **Create a common understanding of the problem to be solved and the motivation for change**
- **Assess the program's readiness for change, including factors that could drive or inhibit change**
- **Who are your key stakeholders and what role(s) might they play**

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## **Reflecting on your organizational assessment:**

- 1) What problem(s) are you trying to solve?**
- 2) How ready is your organization for change (structurally and emotionally)?**

# Preparing for the Improve stage: Innovate

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- Define the targeted change(s) in detail
- Articulate the causal links between the desired program change(s) and corresponding outcomes
- Innovation requires...
  - Time to think
  - Space to try
  - Safety to fail

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# Defining your “Innovation” strategies and targeted outcomes

# Improve

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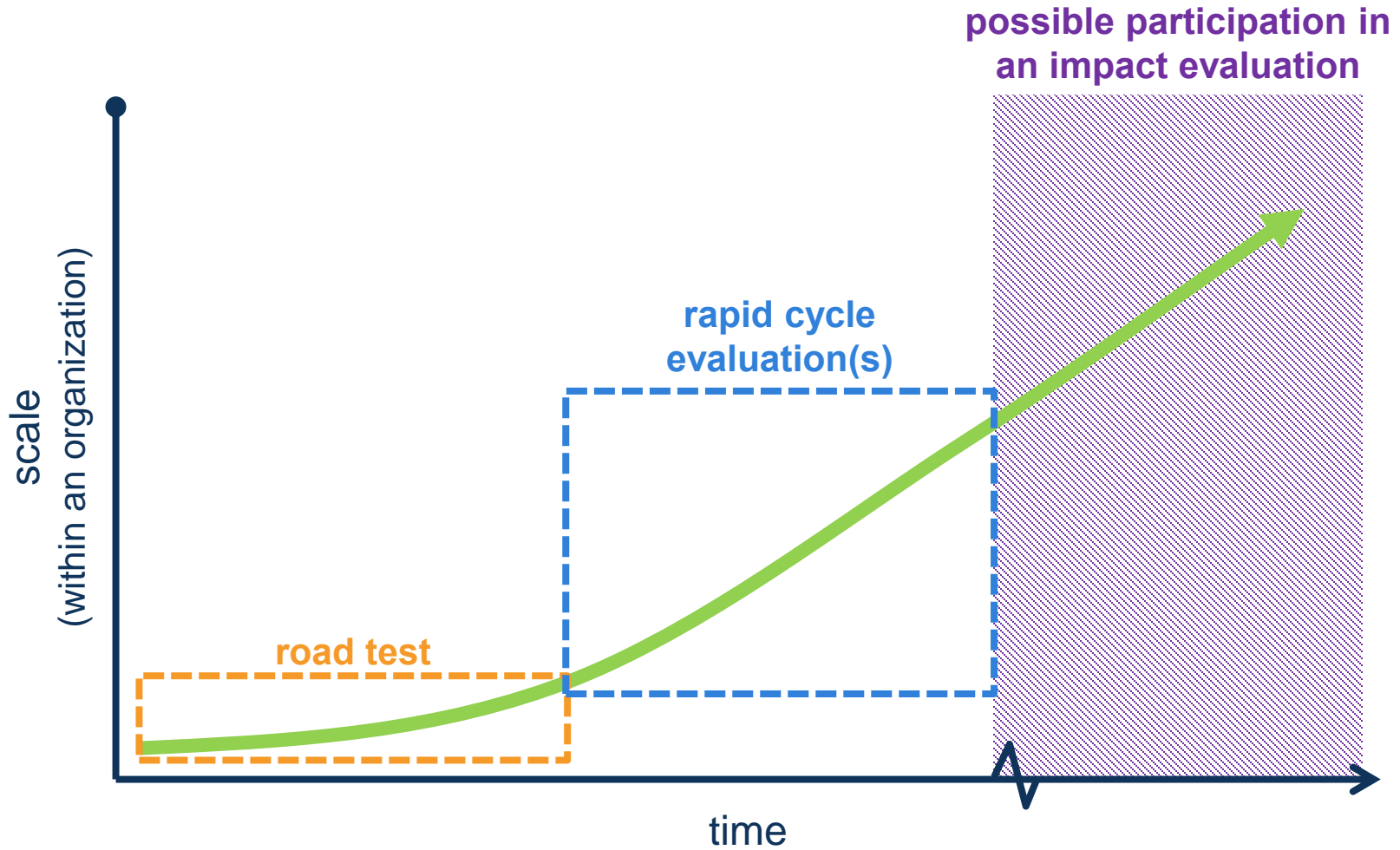
- **Test and refine innovations on a small scale**
- **Determine the conditions for successful implementation and scale-up**
- **Build program staff's capacity to collect, analyze, and use data for everyday decisions and continuous improvement**
- **Build evidence for the program and for the broader field**

# Improve

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- **Possible methods:**
  - Road tests to gather feedback and refine the innovation and its implementation
  - Rapid cycle evaluations to test effectiveness of innovation
    - Uses existing program administrative data and a random assignment design on a short time horizon
- **Results: Identify promising practices and suggest adjustments to strengthen the intervention**
- **Then test again...and again...**

# Road test improves intervention and prepares for rigorous testing—Does it really work??





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# **Opportunities to improve implementation...**

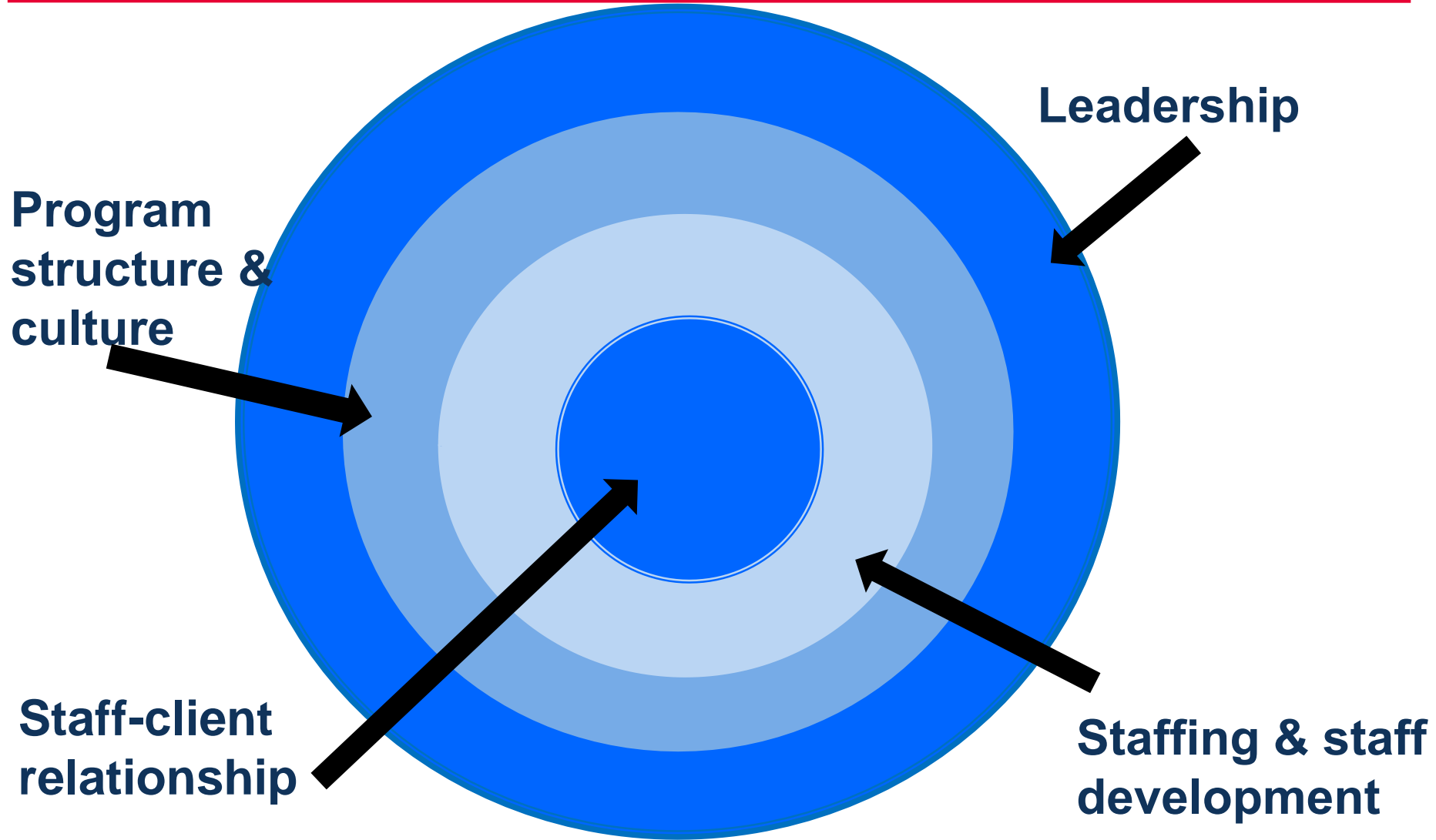
# A few tips for good implementation

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- Pay attention to implementation at all levels
- Streamline business processes
- Implement, integrate, and iterate with precision and intentionality...road test!

# Pay attention to implementation at all levels

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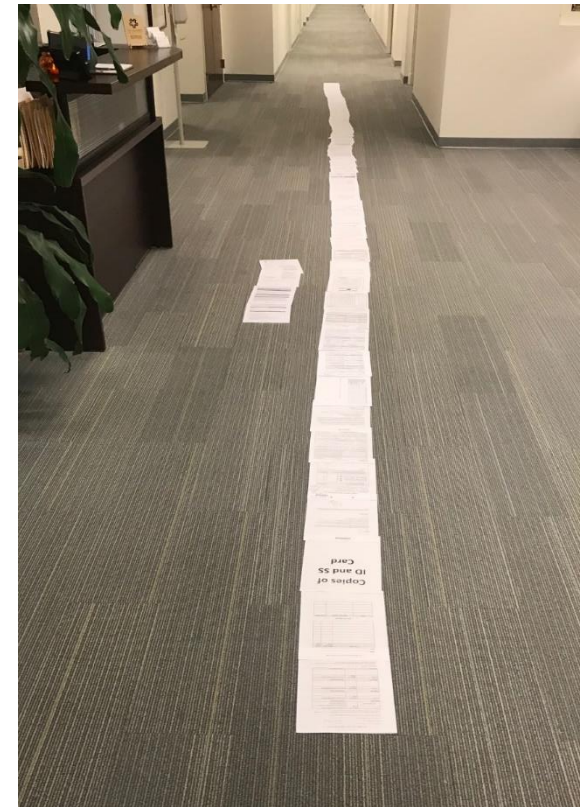
# Example: what we learned from Goal4 It!

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# Streamline business processes

- Examine all facets of a process, such as
  - the process flow
  - who is involved in the process, at what points
  - what information is exchanged
  - what requirements need to be met
- Results in a set of recommendations to improve efficiency, which you can then strategically reinvest
- Example: Paperwork
  - before LI<sup>2</sup> (right)
  - after LI<sup>2</sup> (left)
  - approximately 20,000 hours per year of client and staff time saved



# Streamline business processes

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- **Example: Client flow map**

- work with program staff, supervisors, and managers to develop a visual representation of an ideal client flow through services
- reduce unnecessary client handoffs across staff
- eliminate unnecessary activities
- revamp and streamline activities that could be done more efficiently

→ design efficient internal (not customer facing) processes that support the client flow and set the stage for successful implementation

# Implement, integrate, and iterate with precision and intentionality...road test!

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**Select direct service staff**

*working with*



**A select number of clients each**

*try out*



**Coaching Model or Career Pathways Model**

*and provide*



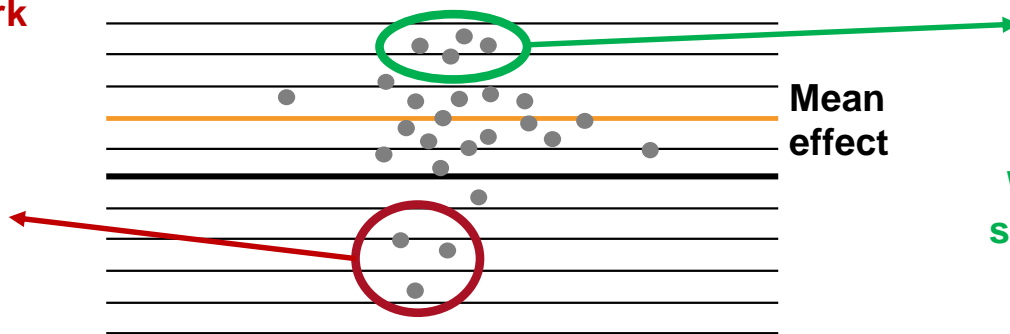
**Targeted feedback about implementation**

# Precision with the “road test”

What works...for whom? Under what circumstances?

- Think about the various subgroups served
  - Why might **X** work well for this particular group?
  - Why might **X** not work as well for this particular group?
  - What could be done differently?

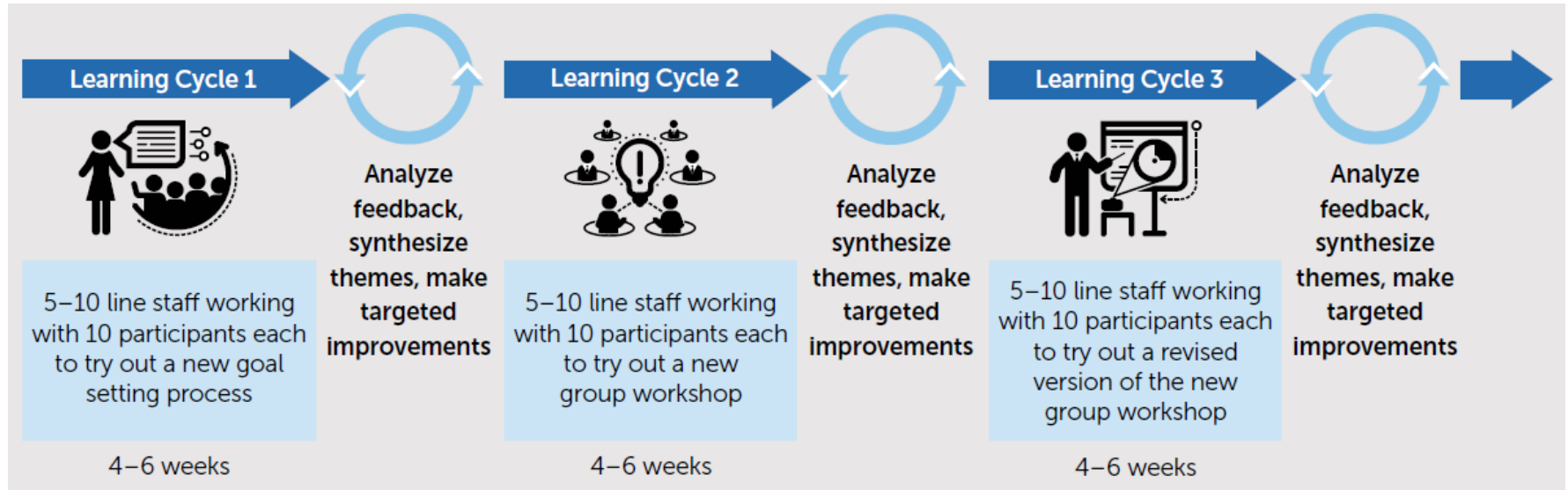
Why did things work so poorly for this group?



Why did things work so well for this group?



# An example road test



- Iterative adaptation and expansion of the strategy
- Feedback should be gathered and disseminated timely

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**Begins with a learning agenda...**

# Example: Coaching intervention

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- Determine how program staff are using the coaching approach and tools
- Identify needed supports for staff to improve implementation
- To what extent does the coaching approach improve the interactions between staff and clients
- Document select implementation successes and challenges

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# **Designing a learning agenda— Team activity**

# Methods: Data Collection and Analysis

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- **What is the process for collecting feedback?**
  - Who will we gather feedback from? (e.g., supervisors, staff, program participants)
  - How will we gather the feedback? (e.g., online surveys, discussion groups, interviews, administrative data)
  - When will we gather feedback? For how long?
- **How will the data be analyzed?**

# Examples: Online Survey

## Stark County Road Test Survey A

Thank you for participating in the April 2018 Goal4 It! road test. Please take a few minutes to answer this survey based on your experience using the Goal4 It! process and tools today. Please complete the survey before close of business every day during the road test period.

\* Required

Did you use any of the Goal4 It! processes or tools today? \*

Yes

No

NEXT

Never submit passwords through Google Forms.

# Discussion Group

- Supervisors led a twice weekly focus group using guiding questions
- Supervisors sent a meeting summary email to designated staff who were collecting the data

STARK COUNTY, OH MATHEMATICA POLICY RESEARCH

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**Stark County Goal4 It!™ April 2018  
Road Test  
Guidance for Supervisors**

**Background**

In collaboration with Mathematica Policy Research, Stark County CCMEP began piloting a customer-focused goal achievement coaching approach with its case managers after the training on March 15 and 16, 2018. Participants of the training included employees from numerous CCMEP vendors, including Goodwill, Next Level Employment, United Way Financial Prosperity Center, Workforce Initiative Association, Tri-County Jobs for Ohio Graduates (JOGS), Project ReBuild, Coleman Professional Services, and HARCATUS. The training introduced CCMEP employees to the Goal4 It!™ model and gave them a chance to practice the use of some of the Goal4 It!™ tools.

**Road test structure and schedule**

The March 15th and 16th training will be followed by a 10-day road test during which (a) daily feedback will be gathered from case managers through an online survey; and (b) biweekly feedback will be gathered through in-person focus groups facilitated by CCMEP supervisors.

The road test will take place over the course of 10 days—from **Monday, April 2nd through Friday, April 13th, 2018**.

Participants, those previously identified by you, will be emailed a survey to fill out before close of business every day during the road test period.

You are in charge of facilitating the biweekly focus groups meetings with the Goal4 It!™ road test participants in your agency. Please plan to meet with the participants for 30 minutes twice a week during the road test period. Use the following questions to guide your conversations. After the meeting, please email a summary of the meeting (including key take-aways) to Rhonda at [rchiurco@omjwork.com](mailto:rchiurco@omjwork.com) and cc Rebecca Dunn at [RDunn@mathematica-mpr.com](mailto:RDunn@mathematica-mpr.com).

**Meeting guiding questions**

The biweekly meetings allow Stark County and Mathematica to gather qualitative feedback about how Goal4 It!™ is being implemented across CCMEP providers. Use the questions below as a guide for conversations, but let the conversation flow naturally to topics that the participants would like to discuss.

**General experiences**

1. What has been your experience with using the Goal4 It! approach and tools so far or since we last met?
  - a. What has worked well?
  - b. What are some of the challenges? How did you address those challenges?

**Thinking about a specific customer**

2. Which goal achievement tools did you use with a customer in the last two days? (*Think about an example of a specific customer.*)

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03/2018 1

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# **Example: Road test and select findings**



# Example: Road test

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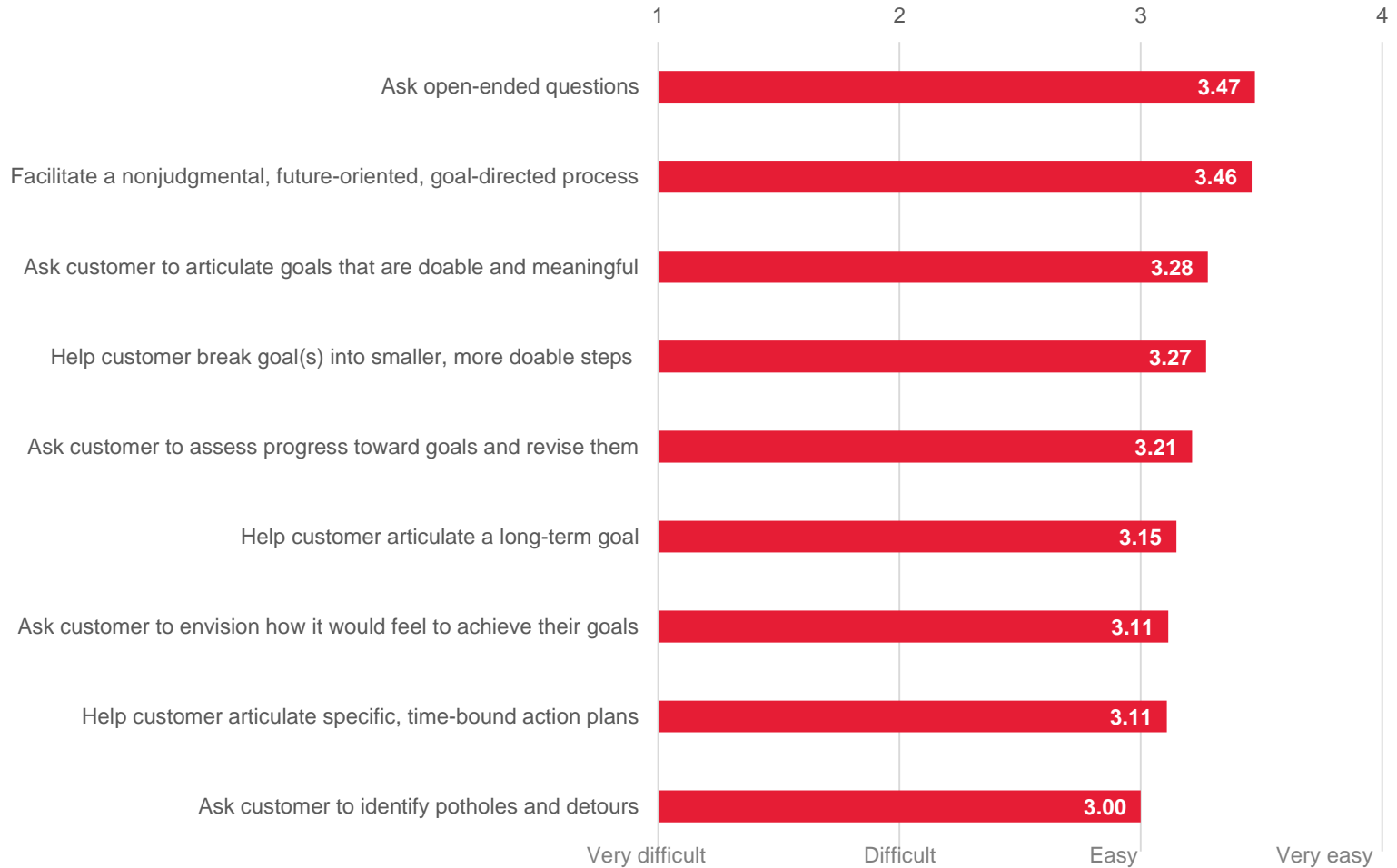
- **Monday, August 13th through Friday September 7<sup>th</sup>**
- **Staff survey distributed every Friday (4 times)**
- **Bi-weekly staff discussion groups (2 times)**
- **Customer surveys administered after each interaction involving coaching approach (103 responses)**

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# Staff feedback

# Coaching skills

## Self-Reported Rating of Coaching Skills



# Feedback on the quality of interactions

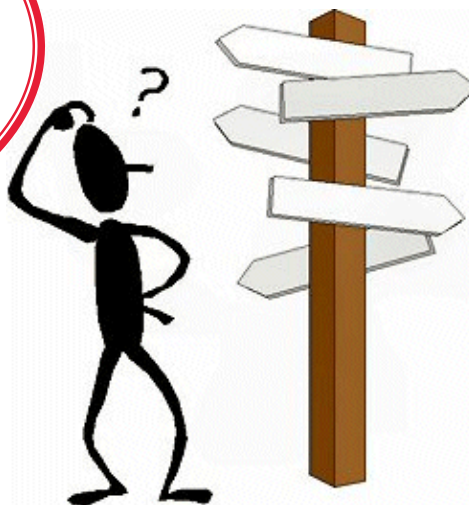
“The quality of interactions improves simply because the tools are **user-friendly and easy to navigate**. The tools allow flexibility but have a specific focus that I think the clients appreciate.” – Provider 1

“It **made the goal planning clear for the client** to see it written out on the pathway plan. It also got the client to see what a goal would look like for a three month plan.” – Provider 1

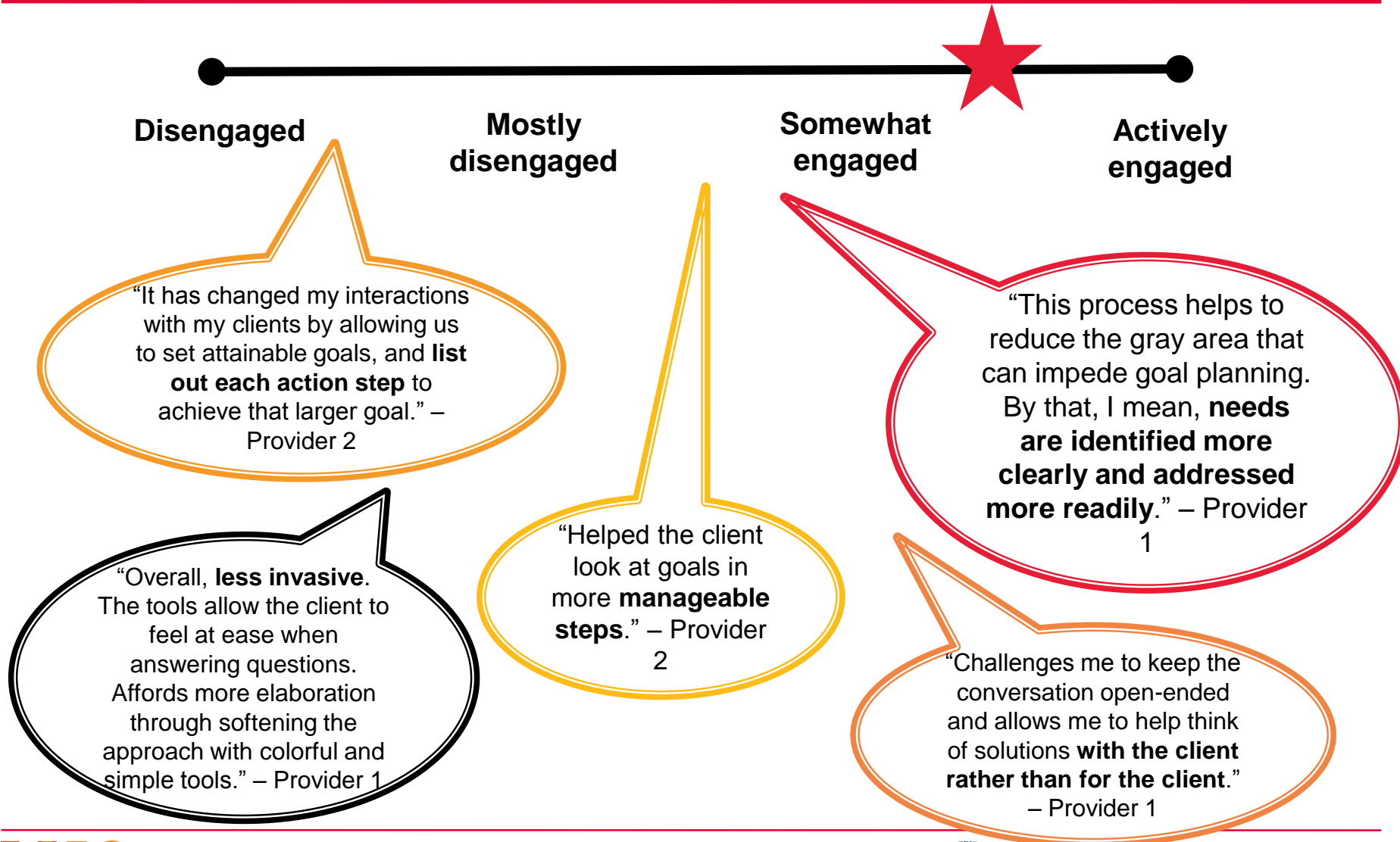
“I think Goal4 It! helps keep the participants **focused on their different need areas and provides the structure to help have meaningful conversation** around what actions they think they can take to help improve the need areas they have identified...” – Provider 2

“**Significantly**” – Provider 3

“Goal4 It! gives the option of starting a **meaningful conversation** and to discuss the **steps of planning**.” – Provider 4



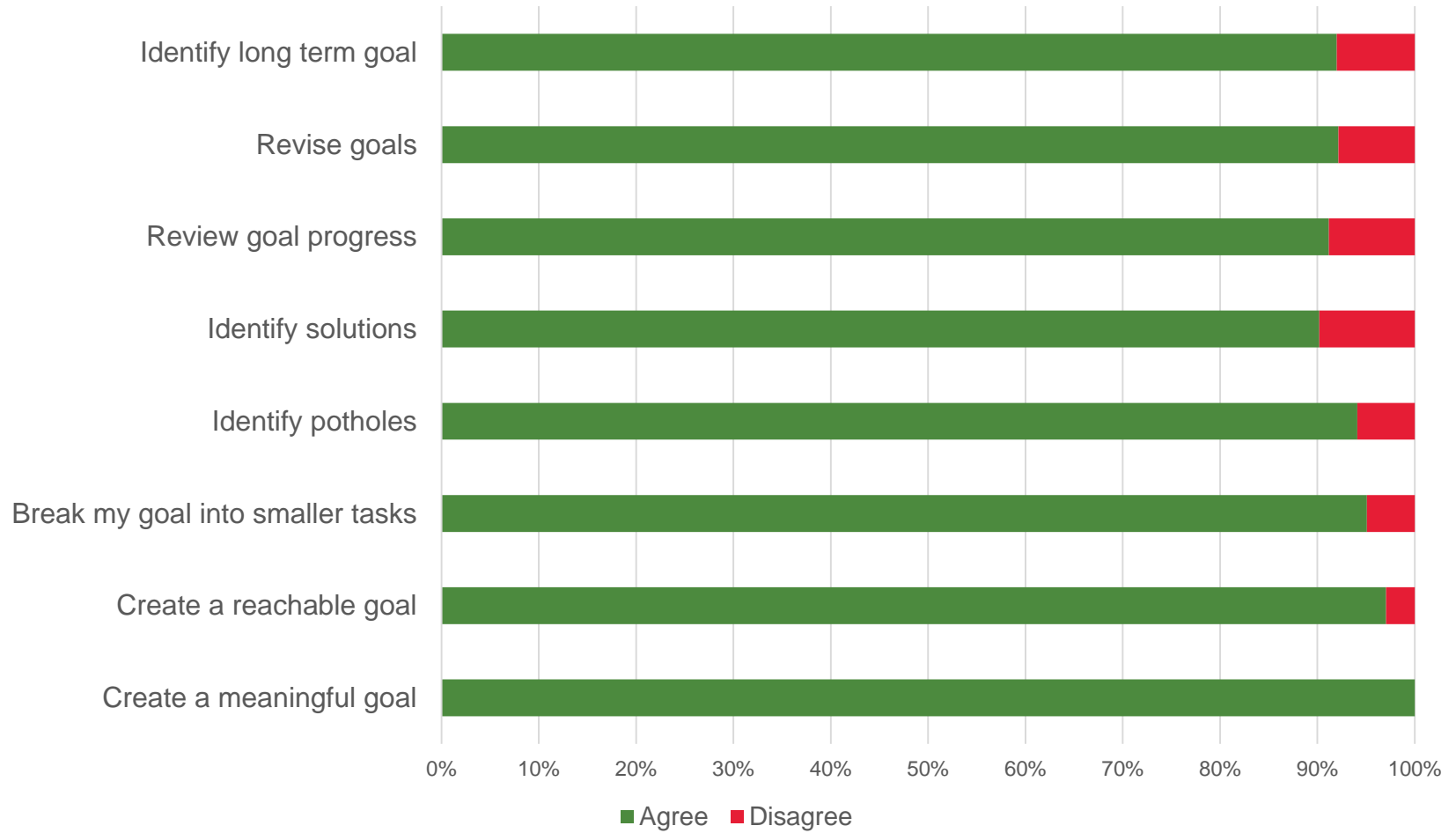
# Customer engagement while using approach



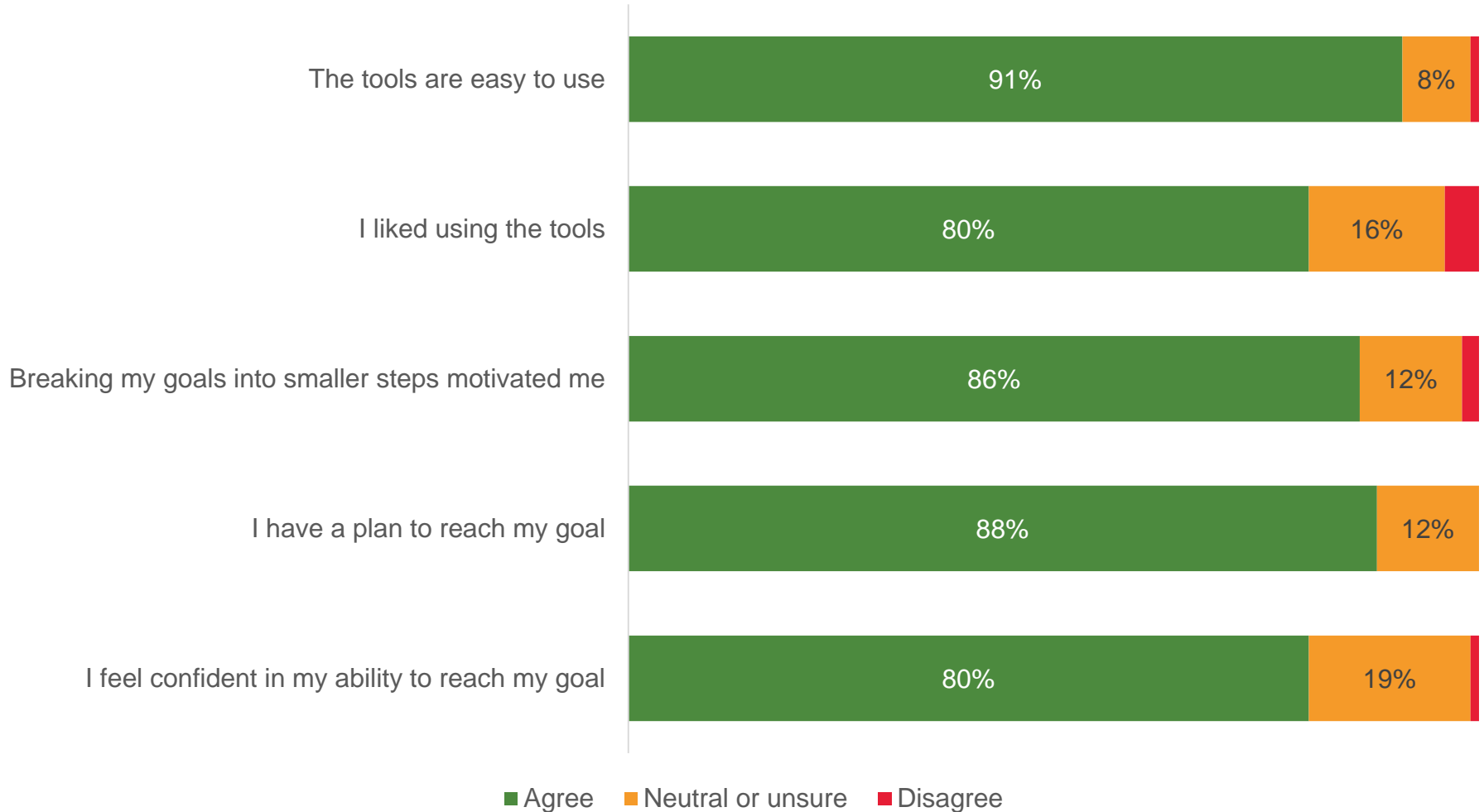
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# Customer Survey Results

# Customer feedback



# Customer feedback





# What did customers find helpful?

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- Break down my goal into smaller steps
- Define a clear short or long term goal
- Made my goals visual; it helped to write everything down
- Gave me a chance to think about my goals
- Allowed me to gain technical knowledge about child care, employment, financial health
- Staff/instructors were helpful
- Other

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# Goals for implementation and road testing...

# For more information

- Check out our practice briefs on road testing and the LI<sup>2</sup> framework

[mathematica-mpr.com/toolkits/li-squared](http://mathematica-mpr.com/toolkits/li-squared)

- Watch our [public webinar](#)
- Contact us directly
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  - [ARachidi@mathematica-mpr.com](mailto:ARachidi@mathematica-mpr.com)

