

Project IMPROVE: How the LI² Process Can Help Your TANF Program Improve Outcomes for Low-Income Families

October 26, 2017
1:00 – 2:30 PM EST



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Welcome

□ Carol Mizoguchi, Office of Family Assistance



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Learning Objectives

- ❑ Provide an overview of the LI² process
- ❑ Highlight innovations that have emerged from TANF programs using this process
- ❑ Consider how LI² might be a helpful approach to you and your program



Roadmap for the Webinar

- ❑ Overview of the LI² process
- ❑ WOOP: Implementing proven interventions with new or different populations
- ❑ Executive function-informed goal achievement: Creating new interventions by translating science into practice
- ❑ Colorado Works Innovation Initiative: Inspiring and supporting innovation through state and local learning communities
- ❑ LI² in Larimer County, Colorado and San Francisco, California



Presenters

- ❑ *Michelle Derr*, Senior Researcher, Mathematica Policy Research
- ❑ *Dena Jardine*, Associate Director, Larimer County Workforce Center
- ❑ *Noelle Simmons*, Deputy Director, Economic Support & Self-Sufficiency Programs, San Francisco Human Services Agency



Poll Question #1

To what extent do you use research and evidence to make decisions about how to improve services for the populations you serve?

- Never
- Rarely
- Often
- Almost always



Why LI²?

- ❑ Often a disconnect between research and practice communities
 - Are practitioners using the science and research evidence?
 - Are researchers studying what practitioners need?
- ❑ Fewer program resources and higher expectations for achieving targeted outcomes
- ❑ Need to increase program capacity to make evidence-informed decisions and test them out



Learn, Innovate, Improve (LI²)



Key Features of LI²

- ❑ Close collaboration between the TA team and program staff
 - Co-creative process
- ❑ Strong evidence and analytic approaches at every stage
- ❑ Capacity building to institutionalize the improvement process



Learn

- ❑ Objective: Assess program environment and clarify the reason for making a program change
 - Problem to be solved
 - Desire to innovate
- ❑ Methods: TA team conducts qualitative assessments of the program environment
- ❑ Results:
 - Common understanding of the motivation for change
 - Assessment of program's readiness for change, including factors that could drive or inhibit change



Innovate

- ❑ Objective: Explore and design evidence-informed solutions that satisfy the motivation for change
- ❑ Methods:
 - Strategic planning with program leadership and staff
 - Analyze existing evidence and other resources to make informed design choices
- ❑ Results: A “road map for change”:
 - defines the intervention in detail
 - specifies the desired program changes and corresponding outcomes
 - articulates the causal links between them



Tips for the Innovate Stage

- ❑ Innovation requires...
 - Time to think
 - Space to try
 - Safety to fail
- ❑ Drawing upon the best available
 - Research evidence
 - Science of human behavior
 - Practice wisdom
- ❑ Get the right mix of people involved and in the room
 - Program administrators and managers
 - Supervisors and mid-level experienced staff
 - Direct service staff



Improve

❑ Objectives:

- Execute a series of small-scale, analytic piloting processes
- Build the program staff's capacity to collect, analyze, and use data for everyday decisions and continuous improvement

❑ Methods: Iterative testing uses a variety of methods

❑ Results: Identify promising practices and suggest adjustments to strengthen the intervention and/or its implementation

❑ Then test again...and again...

A Typical Road Test

A subset of frontline staff (5 – 10)

working with

A few clients per staff (5 – 10)

trying out

Select strategies of the innovation project

providing

Targeted feedback about implementation



Road Test Case Study: Ramsey County, MN

- ❑ **Lifelong Learning Initiative:** coaching + tools/resources/supports + program orientation
- ❑ **Cohort/road test cycle 1:** 6 counselors serving 5 families each for 4 weeks
- ❑ **Cohort/road test cycle 2:** 11 counselors serving 5 families each for 6 weeks
- ❑ **Cohort/road test cycle 3:** 15 counselors serving 5 families each for 6 weeks
- ❑ In between each cohort: analyze feedback, revise tools and supports, and refine the process



Examples of Using LI²

- ❑ Implementing proven interventions with new or different populations
 - Mental Contrasting with Implementation Intentions
- ❑ Creating new interventions by translating science into practice
 - Executive function-informed goal achievement
- ❑ Inspiring and supporting innovation through state and local learning communities
 - Colorado Works Innovation Initiative



Poll Question #2

- What challenges are the highest priority for you to address in your program environment?

(For example, engaging more clients, achieving better employment outcomes, reducing staff workloads)





WOOP

Implementing proven interventions with new or different populations



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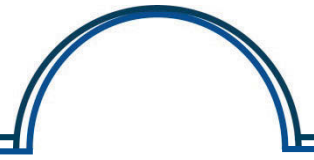
Background on WOOP

- ❑ Twenty years of research showing success with helping people achieve goals related to health, career/academics, and interpersonal relationships
- ❑ Active process for fully engaging in life; process emphasizes discovery not performance
- ❑ Helps a person explore their Wish, Outcome, Obstacle, and Plan without judgement



Use of LI²

- ❑ Three communities: Larimer County, CO; Linn County, OR; JEVS in Philadelphia, PA
- ❑ Assessment site visits to explore how WOOP might be used in TANF programs
- ❑ Road map for change specific to TANF settings
- ❑ Training of WOOP sites
- ❑ Two rounds of road tests in each of the sites
- ❑ Main discovery: Start by using WOOP with staff, rather than clients!



Executive Function- Informed Goal Achievement

Creating new interventions by translating science into practice



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Background on executive-function informed goal achievement

- ❑ Substantial room for improvement in serving low-income individuals and families
- ❑ New understanding of the impact of poverty on adult success (e.g., cognitive ‘bandwidth tax’ and development of executive function) and implications for service delivery
- ❑ Interest in implementing more evidence-based practices and in co-creating new promising practices



Goal Achievement Process

- ❑ GOAL – something you want to accomplish
 - Aim for something you truly care about and that is challenging, but within your reach
 - Imagine what it would feel like to accomplish your goal
- ❑ PLAN – how to get from here to there
 - Specific, small steps
 - Identify potholes and detours for addressing obstacles that are within your control
- ❑ DO – put the plan into action
 - You will need to use several self-regulation skills: Get started, manage your time, stay organized, stick with it
- ❑ REVIEW your progress and REVISE based on what you learned
 - What worked well? What got in your way? What can you do differently?



Poll Question #3

- What are some potential roadblocks that could get in the way of implementing a new strategy to address your priority challenge(s)?





Colorado Works Innovation Initiative

Inspiring and supporting innovation through state and local learning communities



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Background on the Initiative

- ❑ Partnership between CDHS and Mathematica
- ❑ 19 counties joined the Initiative and nearly all completed
- ❑ Walked county teams through the LI² process
 - Three in person convenings
 - Individualized coaching
 - “Ask the Expert” webinar series
 - Road tests with at least one learning cycle
- ❑ Encouraged collaboration within and across sites
- ❑ September 2016 launch; culminated with June 2017 Innovation Conference



Select Innovations

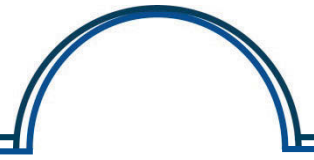
- ❑ Jefferson: simple, inspiring orientation and streamlined assessment process that reportedly improved engagement and changed the program “vibe”
- ❑ La Plata: taking coaching “on the road” and using a “success board” to highlight client achievement
- ❑ Pueblo: reducing staff stress and strengthening internal relationships (NO MORE EMAILS WITH ALL CAPS)
- ❑ Weld: using behavioral insights to improve marketing and outreach materials to increase client engagement



Sustained Engagement and Capacity Building

- ❑ Ongoing county involvement in nine sites
 - Federal projects (e.g., GOALS, AWESOMER, IMPROVE)
 - Presented and/or attended national research conferences
 - Invitations to present at national meetings or in other states
- ❑ Videos, resources, and tools shared nationwide
- ❑ Continuing contract to develop and test behavioral science strategies for increasing initial client engagement





LI²: Strengthening the Testing, Implementation, and Integration of Program Changes

Dena Jardine, Associate Director, Larimer County Workforce Center



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About the Larimer County Workforce Center

- ❑ Larimer County is in Northern Colorado, encompasses 2,640 square miles, and has an estimated population of 333,577.
- ❑ The Workforce Center provides all Temporary Assistance for Needy Families (TANF) related program services with emphasis on employment.
- ❑ County caseload averages 650 per month.
- ❑ Have been working with Mathematica and key partners for two years to implement evidence-based practices into our everyday work.



The LI² Process in Larimer County

- ❑ LI² has been useful in three ways
 - An “Innovate” strategic planning workshop (November 2015) related to supporting an online coaching/participant success platform into the daily service delivery model (aka: My Journey to Success).
 - Two distinct series of road tests to formatively test and improve program enhancements regarding the online platform and WOOP.
 - A rapid cycle evaluation that tested messaging strategies design to improve timely submission of monthly timesheets by TANF participants, informed by behavioral science.



Strategic Planning Workshop: My Journey to Success

- ❑ My Journey to Success is an accessible, 24/7, mobile-friendly, two-way facing technology that scaffolds six major life areas with pre-existing “action steps” to build goal-achievement skills and reduce staff workload; customers are also able to design personalized goals.
 - Six major life areas: Family Stability, Well-Being, Financial Health & Legal, Education & Training, Job Search & Employment, and Supporting My Goals (Executive Functioning skills).
- ❑ The “Innovate” strategic planning workshop identified ways to incorporate insights from the behavioral sciences regarding the successful use of goal-oriented skills.



Road Test #1

- ❑ Conducted an initial “Prototype Test” with a select number of participants to collect feedback (from coaches and customers) about what worked well and what could be improved regarding basic functionality, usability, and the overall user experience

Road Test #1 operated for 5 weeks:
June 27 – August 5, 2016



Road Test #2

- ❑ Gathered feedback from coaches and customers about the implementation, functionality, and user experience following [enhancements and expanded content](#) as a result of Road Test #1
- ❑ Road Test #2 explored:
 - How are coaches using MJTS during in-person meetings with customers?
 - How and when are customers using MJTS outside of the Workforce Center setting?
 - In what ways does MJTS affect coaches' administrative responsibilities?
 - In what ways does MJTS affect customers' access to services and supports?
- ❑ Road Test #2 operated for 6 weeks: January 17 – February 24, 2017



Road Test #3

- ❑ Created a compelling reason for both coach and customer to use My Journey to Success with the focus on implementing the online Monthly Time Sheet (MTS). The MTS documents the work activities required for the Work Participation Rate (WPR).
- ❑ Road Test #3 explored:
 - Does the MTS functionality in MJTS make it easier for customers to submit their required monthly timesheet in a timely manner?
 - Does the MTS functionality in MJTS reduce staff administrative burden associated with timely MTS submission compliance and verification?
- ❑ Initiated random drawing/incentive for a Kindle and five \$50 pre-paid debit cards for customers that submitted an online MTS and voluntarily completed a feedback survey.



Road Test #3 (continued)

❑ What Happened:

- 381 customers initiated an online MTS – 327 customers successfully completed.
- Of the 327 successful MTS submitters, 123 customers provided 153 responses.
- 67% reported the online MTS was easier to use; 9% reported it was harder.
- 70% reported the online MTS would make them more likely to complete and submit on time.
- 60% of the caseload transitioned to the online MTS in the month of May.

❑ Road Test #3 operated for four weeks: April 2017



Upcoming Road Test #4

- ❑ Gathering feedback from coaches and customers about the functionality and user experience of the online Roadmap (i.e., the Individual Responsibility Contract).
- ❑ We are flying solo on this road test!



Road Test: WOOP (Wish, Outcome, Obstacle, Plan)

- ❑ A road test involving two facilitated learning cycles to formatively test and improve the use of WOOP within the TANF program.



Rapid Cycle Evaluation: Improving Monthly Time Sheet Submission Rates

- ❑ Larimer County rigorously tested a set of messaging strategies designed to improve timely submission of monthly timesheets among TANF participants, informed by behavioral science.
- ❑ The rapid cycle experiments informed future decisions regarding the continuation of the strategies.



And the Learning Continues...

- ❑ As a result of LI², Larimer County has become more analytic in planning program changes and using research methods to improve implementation and program outcomes.
 - Continued use of road test methodology = supports analytic thinking and anticipatory problem-solving as new services/strategies unfold.
 - Techniques allow for intentional inclusion and engagement of staff and customers.
 - Strategies assisted with managing change fatigue for staff and customers.





How the LI² process can help your TANF program improve outcomes for low-income families

Noelle Simmons, Deputy Director, San Francisco Human Services Agency



Background on the initiative

- ❑ TANF programs are county-administered in California
- ❑ The Economic Support & Self-Sufficiency Division of the San Francisco Human Services Agency (SFHSA) administers TANF, Medicaid, SNAP, and General Assistance
- ❑ Project 500 (P500) is a local initiative that seeks to disrupt the transmission of intergenerational poverty while improving outcomes for parents and children

Use of LI² Process

❑ What are we testing?

- A package of tools intended to help low-income families set meaningful near-term goals for themselves, come up with a plan to accomplish them, anticipate and plan for potential challenges, and reflect on their experience

❑ Who is testing the tools?

- Seven P500 Mentors and one supervisor
- P500 clients



LI² Learning Objectives

1. What is the experience of staff in using the goal achievement tools?
2. What are P500 staffs' perceptions of the parents' reactions to using the tools?
3. What types of goals are parents setting with P500 staff?
4. What are the strengths and limitations of the goal achievement process—GoalLearn, GoalPlan, and GoalReview?
5. What recommendations do P500 staff have for revising the goal achievement tools and/or process?



LI²: The Opportunity

- ❑ Free technical assistance from knowledgeable TA providers
- ❑ Structured, time-limited process accelerates the learning process
- ❑ Captures both worker and client experience
- ❑ Creates an opportunity for peer-to-peer learning, troubleshooting and identification of what works best



LI²: The Challenges

- ❑ Direct service staff may be unaccustomed to the innovation process or not view it as their role
- ❑ Competing priorities for staff time
- ❑ LI² helps you improve your service delivery process and provides insight into client and worker experience, but it's not an outcome evaluation



Lessons Learned & Considerations

- ❑ Be clear about what you are trying to learn
- ❑ Consider using LI² during the formative stage of a new program or process
- ❑ Set expectations with staff; clarify their role and consider requiring participation
- ❑ Staff preferred more intensive “boot camp” approach to road testing
- ❑ Consider a facilitation guide for the supervisor(s) who work with participating staff
- ❑ A successful LI² process could affirm the direction you’re headed . . . or could require you to pivot



Open Time for Your Questions



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Additional Information

- ❑ Michelle Derr
 - MDerr@mathematica-mpr.com
- ❑ Scott Baumgartner
 - SBaumgartner@mathematica-mpr.com
- ❑ OFA PeerTA website (<http://peerta.acf.hhs.gov>)
- ❑ Webinar transcript and recording
- ❑ Future webinar topics (peerta@icf.com)



Webinar Feedback

- Please remember to provide your feedback using the brief survey that will launch when the webinar ends.

