**Planning Guide for Closing Continuous Quality Improvement (CQI) Projects**

# Purpose

This planning guide was developed for MIECHV Program awardee teams who recently participated in the Home Visiting Collaborative Improvement and Innovation Network (HV CoIIN) or the MIECHV Technical Assistance Resource Center (TARC) CQI Practicum. The guide is designed to support awardee teams to **(1) summarize progress and planning** for the next steps with currently participating local implementing agencies (LIAs) and **(2) plan for scaling** with additional LIAs. We recommend engaging your HV CoIIN improvement advisor or TARC TA specialist to provide real-time support as you complete this guide.

# Introduction

This planner is divided into three parts:

* **Part 1, *At a Glance Information to Inform Next Steps***, provides space to summarize results to help inform dissemination and planning next steps.
* **Part 2, *Next Steps for Participating LIA Teams****,* provides space to explore your next steps for sustaining the gains and continuing to support current teams.
* **Part 3, *Scaling with Additional LIAs***, will help your team identify the next steps for bringing tested interventions to a new cohort of LIAs.

# Part 1: At-A-Glance Information to Inform Next Steps

## Section A. Assessing Current Progress

Use the tables below to summarize team engagement in HV CoIIN or the CQI Practicum and key data results.

### *Engagement in the Learning System*

|  |  |
| --- | --- |
| **Statistic** | **Responses for your State** |
| *Current # of Teams Engaged in HV CoIIN / CQI Practicum* |  |
| *Total # of MIECHV LIAs* |  |
| *Average N and % of teams reporting data monthly*  |  |
| *Average number and % of teams submitting PDSAs monthly*  |  |

### *Data Results*

|  |  |  |  |
| --- | --- | --- | --- |
| **Measure**  | **Baseline median of participating LIAs** | **Shifted median of participating LIAs if improvement over time** | **N and % of teams meeting the aim for this measure**  |
| 1.  |   |   |   |
| 2.  |   |   |   |
| 3.  |   |   |   |
| 4.  |   |   |   |
| 5.  |   |   |   |
| 6.  |   |   |   |
| 7.  |   |   |   |
| 8.  |   |   |   |

### Reflections

Do you have confidence in your data results and quality (most teams reporting, few data errors, etc.)?

Are you satisfied with this progress? If not, where would you like teams to be?

Are there drivers where deeper testing and work is needed? If yes, where is testing needed?

## Section B. Disseminating Your Results

Consider the following questions to help your team plan what project results you might share and what activities you might use to disseminate your learning.

What are your top results/lessons that you want to disseminate? What are your key messages?

Who do you want to disseminate your results to? *Think about who you are trying to build will with as well as who could benefit from key lessons or change. Consider home visiting participants and staff, department or agency leaders, community collaborators, state/territory task forces, or early childhood councils.*

What activities do you intend to engage in to disseminate results?

[ ]  Inclusion of results in newsletters to local teams and/or partners

[ ]  Training for local teams

[ ]  Inclusion of your plans and outcomes in your annual MIECHV CQI report

[ ]  Final report or fact sheet

[ ]  Publication(s) to a journal(s)

[ ]  Conference presentation(s)

[ ]  Other:

# Part 2: Sustainability and Next Steps for Participating LIA Teams

## Section A. Next Steps for Current Teams

After the conclusion of HV CoIIN or the CQI Practicum, you may consider continued work on your topic, either with a subset of teams or on a focused set of drivers/changes. You can continue to include your HV CoIIN or CQI Practicum work in your MIECHV CQI Plan.

Are there teams that need to improve the quality of their data? What supports would facilitate their continued work to improve data collection and reporting?

Are there teams that are close to meeting the HV CoIIN or Practicum aims who would benefit from continued work? What support would facilitate their continued work to meet the aims? For drivers where more work is needed, how can your team support continued testing and learning?

|  |  |  |
| --- | --- | --- |
| **List teams who are close to meeting aims** | **List drivers where you are not yet meeting the aims** | **What support might your team offer to continue the work?** |
|  |  | [ ]  Continue monthly data & PDSA submission[ ]  1:1 coaching calls with teams[ ]  Peer to peer calls [ ]  Office Hours [ ]  Support teams to become peer mentors[ ]  Connection to local faculty who can provide content support[ ]  Other ideas:  |

## Section B. Supporting Sustainability

This section provides questions and planning space for steps your awardee team should take to support the sustainability of outcomes.

### *What does your awardee team need to be put into place to ensure outcomes are sustained? Review the table below for steps your team could consider.*

|  |  |  |
| --- | --- | --- |
| **Key component of sustainability** | **Potential Steps** | **What next steps will your awardee team take?** |
| **Hardwiring the Change** | [ ]  Update state/territory policies, procedures, and protocols to ensure new process is clear​[ ]  Incorporate successful changes into state/territory training and PD​[ ]  Build time for implementation planning into the improvement work​[ ]  Secure resources to help sustain change |  |
| **Increasing Staff Readiness** | [ ]  Publicly support the change and share results​[ ]  Leadership training for supervisors​[ ]  Help manage change fatigue​[ ]  Offer content on implementation at various events (state/territory trainings, team meetings, supervision)​[ ]  Facilitate peer sharing on implementation​[ ]  Offer 1:1 coaching on implementation |  |
| **Monitoring Results Over Time** | [ ]  Periodic check-ins with LIA on data and status of past projects​[ ]  Add data elements to data systems for easy tracking and reports​[ ]  Offer quick summaries and updates on past projects via newsletter or at state/territory-wide events[ ]  Ask teams to continue to collect data for 6 months |  |

What measures will your awardee team continue to collect/monitor to sustain the gains? How often will the data be collected and reviewed?

How would you rate your local teams’ level of confidence and learning of CQI methods? Are there gaps in learning that you still need to address? *Consider: data reporting, using data to drive testing, etc.*

Who are your new CQI champions and how can they share their knowledge / experiences with other teams? *For example, they might lead a PDSA simulation at your state/territory CQI training or talk about building their CQI culture on a webinar / all-LIA meeting.*

What skills, tools and/or new processes does your awardee team now have in place for supporting CQI work moving forward?How can you adopt these in your future CQI projects? *Consider:* *running coaching calls, providing PDSA reviews, reviewing data quality, etc.*

# Part 3: Scaling with Additional LIAs

The HV CoIIN uses the Breakthrough Series (BTS) Collaborative as their method for scale. Should you want to scale this work to a new cohort of LIAs using a similar approach, this section provides details on the infrastructure that is needed for running a BTS. Please note that there are several other [methods for scaling](https://ssir.org/articles/entry/many_ways_to_many) outcomes. If another method is more appropriate for your context, please reach out to your HV CoIIN improvement advisor or TARC TA specialist for support.

## Section A. Scope and Future Participants

How many new sites do you want to scale with? *A general rule of thumb for spread is to increase by multiples of 5. For example, start with one site, spread to five, then to 25, then to 175.*

How will you decide which sites to include in future efforts? *For example, you might consider sites with gaps in their data, or those with high will.*

How will you leverage the teams currently participating to support future participants. *For example, you might ask them to share or present PDSA cycles or engage them as peer coaches*.

## Section B: Infrastructure for running a Breakthrough Series Collaborative

The following table lists conditions that are important for the success of a Breakthrough Series (BTS) Collaborative. Consider the state of your current infrastructure for each of the conditions. What are the next steps that you can take to get each condition in place? Are there subsequent implications for any of the conditions to inform your next steps (e.g. staff turnover may lead you to take a break before kicking off a new BTS series, if several conditions are not possible, is another scale method more appropriate)?

| **Condition** | **Self-assessment (met, somewhat, not possible)** | **What are your next steps for moving forward or meeting this condition?** | **By when?** | **Who is responsible?** | **What T/TA support do you need?** |
| --- | --- | --- | --- | --- | --- |
| *Leadership is in place and committed to continued scale efforts* |  |  |  |  |  |
| *Six or more local teams with high will and gaps in their outcomes are available to participate*  |  |  |  |  |  |
| *Cumulative CQI staff time equals a minimum of 2-4 days per month to support the BTS model* |  |  |  |  |  |
| *Day-to-day lead can dedicate a minimum of 4 days per month for coordination and follow-up to the state and local teams* |  |  |  |  |  |
| *Content expert(s) available to support ongoing coaching in content as warranted (e.g., expert from community mental health)* |  |  |  |  |  |
| *CQI expert(s) available to review team’s data and PDSAs monthly and train participating LIA teams in the Model for Improvement*  |  |  |  |  |  |
| *Ability to host virtual,* ***monthly*** *topic calls* |  |  |  |  |  |
| *Ability to host 3 in-person or virtual learning sessions annually*  |  |  |  |  |  |
| *Local teams could participate in learnings sessions without undue burden (e.g., could happen as part of an already occurring quarterly meeting)* |  |  |  |  |  |

# Resources to Support the Implementation of a Breakthrough Series (BTS) Collaborative

* The [Breakthrough Series Virtual curriculum](https://hv-coiin.edc.org/bts-college/) offers MIECHV Program awardee teams participating in the Home Visiting Collaborative Improvement and Innovation Network (HV CoIIN) to access to the same content offered during the 3-day, in-person BTS College.
* [Scale timeline](https://hv-coiin.edc.org/scale-timeline/preparing-scale) outlines key activities in running a BTS, along with sample resources.