National Community Action Partnership

Rapid Cycle Learning Webinar
July 24, 2024

National Community Action Partnership
1020 19th Street NW, Suite 700
Washington, DC 20036

May 29, 2024



The Promise Of Community Action

Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

RAPID CYCLE LEARNING

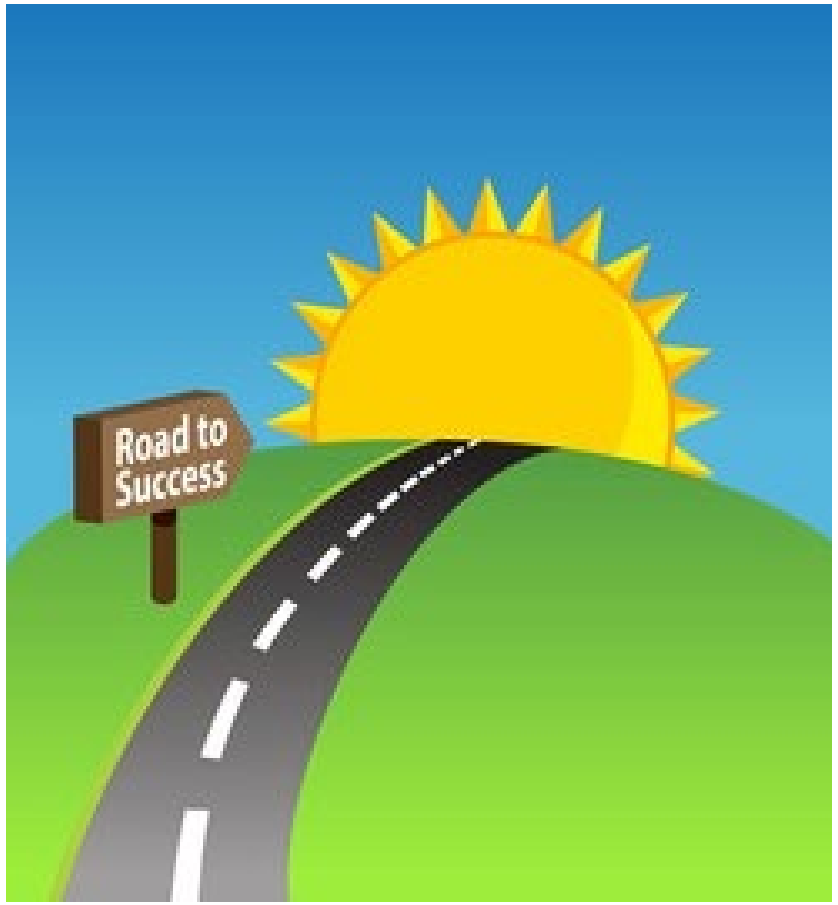
Using Rapid Cycle Learning techniques with ROMA principles and practices to improve data analysis skills.

July 24, 2024

Webinar Wednesdays

WORKSHOP OVERVIEW

Part 1



- What is performance management?
- What is Rapid Cycle Learning (RCL) and how it can be used?
  - *Understanding RCL will improve data analysis skills*
- Examples of RCL projects
  - Ideas for creating a RCL Project
  - Helpful tools for data analysis



DATA ANALYSIS

The area of skill building most requested by our network!



PERFORMANCE MANAGEMENT

Improvement and Maintenance of successful polices and services

PEAAK

Performance	Evaluation	Accountability	Accessibility	Knowledge
• Community Needs Assessment • ACSI • Organizational Standards • Accountability Measures* • ROMA Next Gen	• Organizational Standards • Accountability Measures • ROMA Next Gen • Monitoring • Oversight	• Monitoring • Oversight • CSBG State Plan • CSBG Annual Report	• Making the CSBG Story available ✓OCS Annual Report ✓Congressional Report ✓CSBG Performance Management website	• How well do you know your CSBG Story? ✓CSBG State Plan ✓CSBG Annual Report ✓CSBG Performance Management website

The National Community Action Network Theory of Change

Community Action Goals

Goal 1: Individuals and families with low incomes are stable and achieve economic security.

Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity.

Goal 3: People with low incomes are engaged and active in building opportunities in communities.



Services and Strategies

Employment

Education & Cognitive Development

Income, Infrastructure & Asset Building

Housing

Health/Social Behavioral Development

Civic Engagement & Community Involvement

Core Principles

- Recognize the complexity of the issues of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community level change
- Maximize involvement of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

Performance Management

How well does the network operate?

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System

What difference does the network make?

- Individual and Family National Performance Indicators
- Community National Performance Indicators

A national network of over 1,000 high performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.

This publication was created by NASCSP in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, Grant Number 90ET0451.

How well does the network operate?

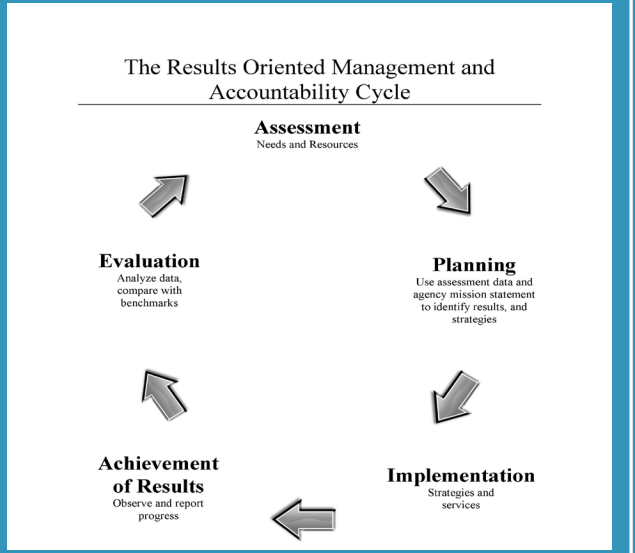
-- Local agencies meet Organizational Standards

-- CSBG offices and OCS meet state and federal Accountability Measures

-- The network understands and uses a comprehensive performance management system

AGENCY LEVEL NEEDS

To assure there is a reliable process for identifying specific issues in the lives of individuals and families with low income and the communities in which they live, and establishing activities to use CSBG and other leveraged funds to address the issues.



ORG STANDARDS AND ACCOUNTABILITY MEASURES

We think of these as guiding "the way things are done,"

but organizational culture is a critical factor behind the articulated processes of these guides.

How does your organizational culture view data analysis?

- Remember that organizational culture holds assumptions that might be based on past experiences that are no longer valid.
- Those assumptions still drive the way work gets done, and the general attitude toward things like data collection and analysis.
- Be sure to consider your organizational culture!



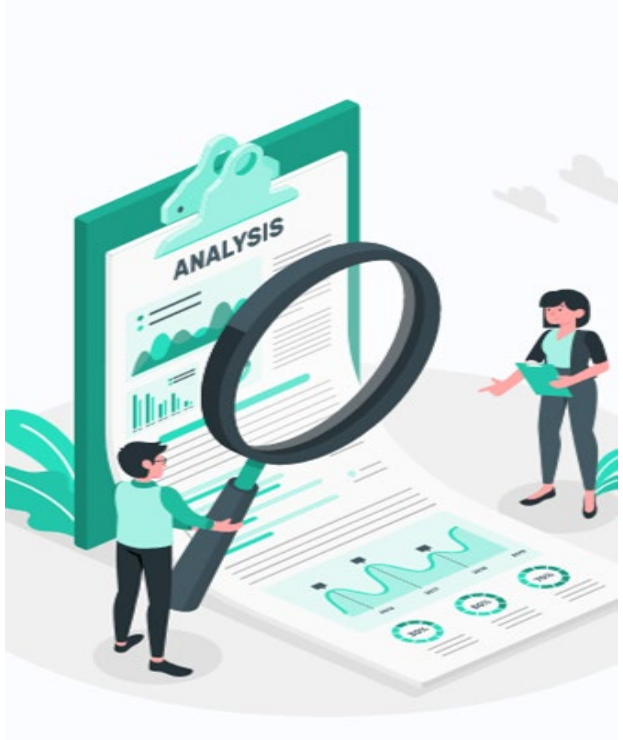
I don't know how it started,
I just know it is part of our corporate culture!

To help make data analysis a positive part of your organizational culture, be clear about the “what” and “why”

- WHAT do you want to know?

- WHY are you interested in the data?

  What can you LEARN from it?
  What you plan to USE your data for?



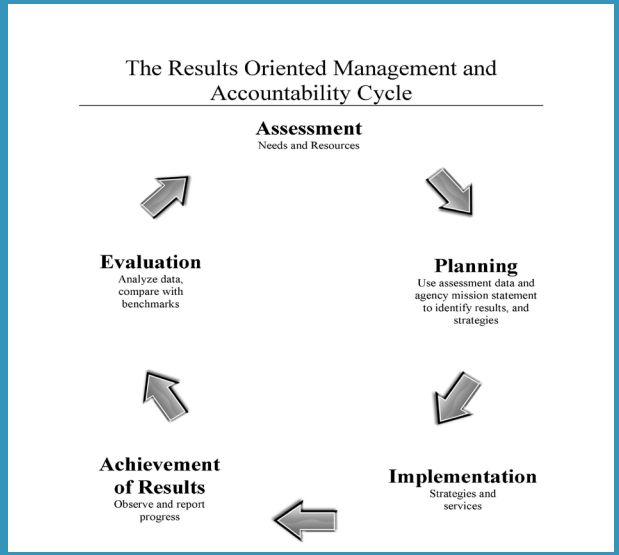
What difference does the network make?

-- Individuals and families receive high quality services (SRV) and achieve outcomes (FNPIs)

-- The network engages in strategies (STR) with others to address community level issues (CNPIs)

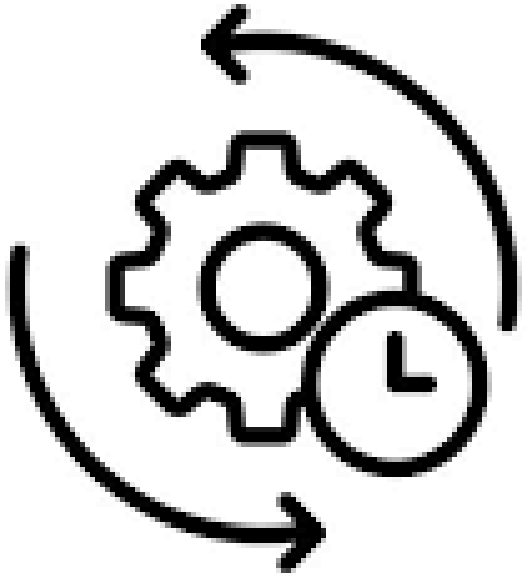
FAMILY AND COMMUNITY NEEDS

The ROMA Cycle guides us to collect data about our actions and their results, and to evaluate the data to help us improve.



DOES YOUR ORGANIZATION EXPERIENCE THESE?

- Living with low expectations. Doing what is has always been done even if results are not great rather than exploring creative responses.
- Focused on each little problem as it comes up – having a feeling that there is always something going wrong.
- Accepting the constraints that generated the problems in the first place! Not challenging "the way things are/have always been".



RAPID CYCLE LEARNING

What is it?

How can it be used?



TRADITIONAL EVALUATION PROJECTS

Timing **Scope** **Purpose**

Performance Management –Timing of Processes



Typical time frames for Assessment and Planning happen over 3-5 year periods.



Programs are implemented most often for a "program year" or "calendar year" or "fiscal year"



Reporting may be done monthly, quarterly, annually



Evaluation?? When is it done?

Traditional Evaluation Projects



Are about the "big picture" of the project:

- How it was implemented
- What happened



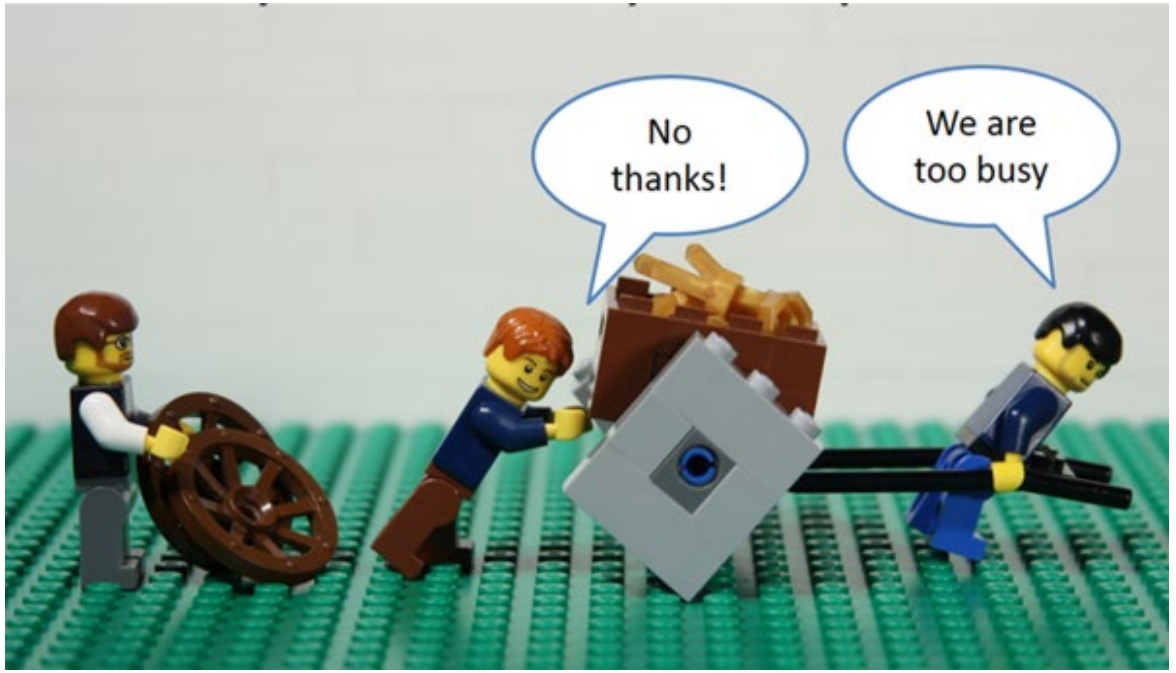
Provide a "look back" approach to compare projected and actual



TAKE TIME FOR LEARNING

RAPID LEARNING METHODS AND THEIR PURPOSE

Are you too busy to improve?



Changes to the needs, plans, and targets are likely to happen.

Effective agencies have a quick and easy process to allow for amendment to their plans that embraces a continuous learning process

- They develop a "check in" process to update the plan if needed.
- They respect the on-going nature of assessing needs while conducting routine business.



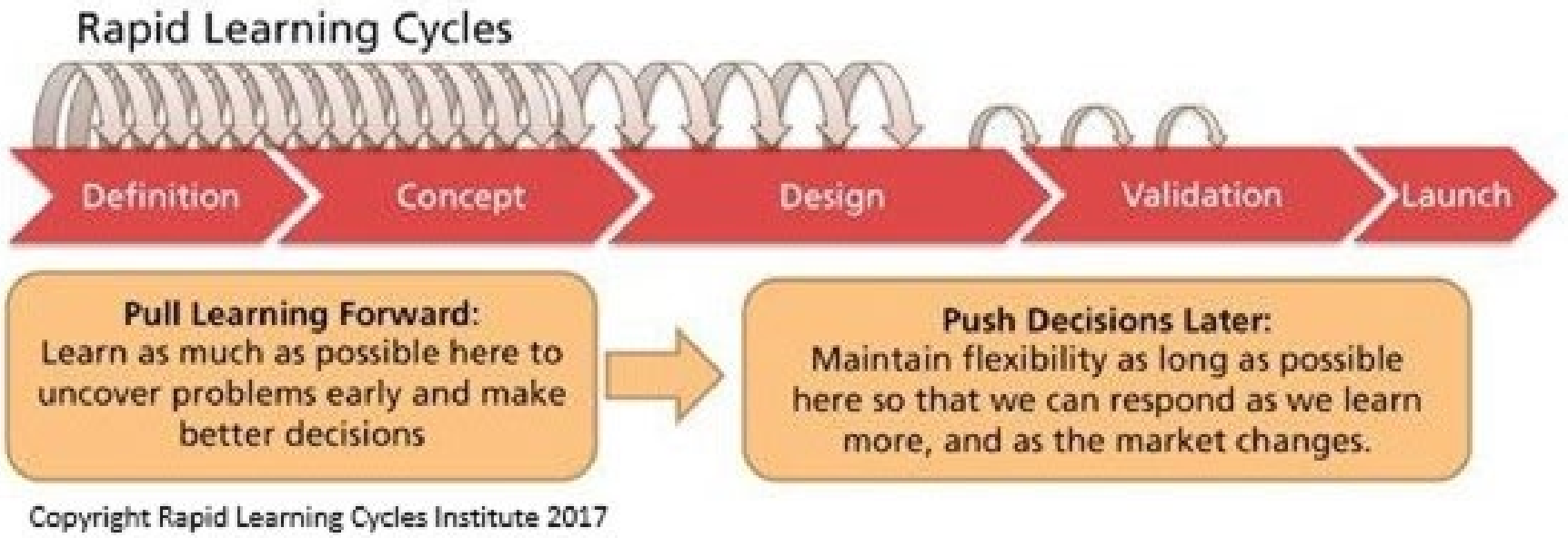
If something is “urgent,” that doesn’t mean that *ANY* quick solution is right!

- When they are confronted by urgent problems, human services professionals are often expected to implement quick solutions.
- But urgent problems are often complicated.
- Adopting a solution prematurely, increases the risk of not solving a problem, or worse, tackling the wrong problem.
- Thinking about the factors that make up a larger problem can be beneficial IF you then think strategically about how the factors influence the overall situation.

WHAT ARE RAPID LEARNING METHODS?

- Rapid learning methods intend to expedite program improvement and effectiveness.
- These methods support data-driven decision-making in the spirit of ongoing improvement.
- They use data to test a proposed change over a short period.
- Expect many cycles of learning in which findings are discussed and analyzed, and additional changes are tried out.

Rapid Learning Cycles in Product Development



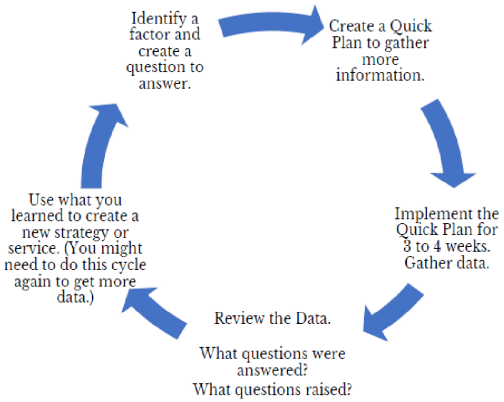
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Rapid Cycle Learning and Evaluation

- Focus on collecting data early and often in a planning phases.
- Use the data from one cycle to make decisions for the next cycle and continue to observe and test your assumptions as you move forward.
- Frequently evaluate the effectiveness of your actions.

Rapid Cycle Learning

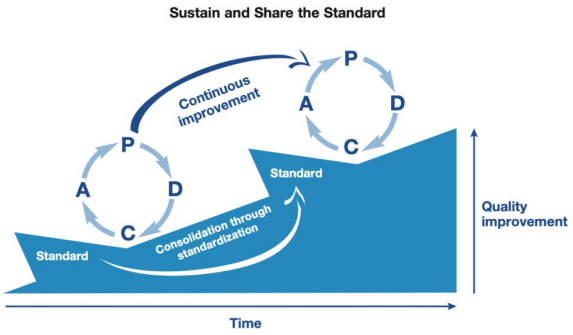










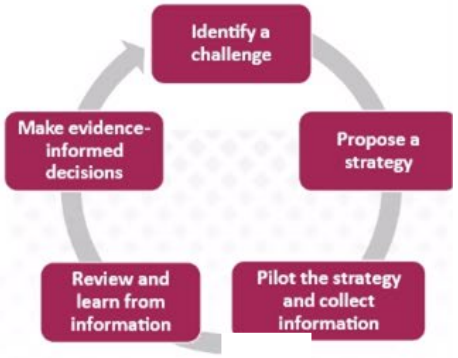


RCL supports ROMA!

ROMA framework



RCL framework



Graphic from:

Helping People. Changing Lives. community Action PARTNERSHIP AMERICA'S POVERTY FIGHTING NETWORK

ADMINISTRATION FOR CHILDREN & FAMILIES Office of Community Services

CSBG Community Services Block Grant

How does RCL support ROMA?

ROMA:

Planning step



How RCL can support:

- Overcome decision paralysis.
- Start small by piloting before rollout.

ROMA:

Implementation step



How RCL can support:

- Identify implementation barriers.
- Pilot supports to address barriers.

ROMA:

Results and evaluation steps



How RCL can support:

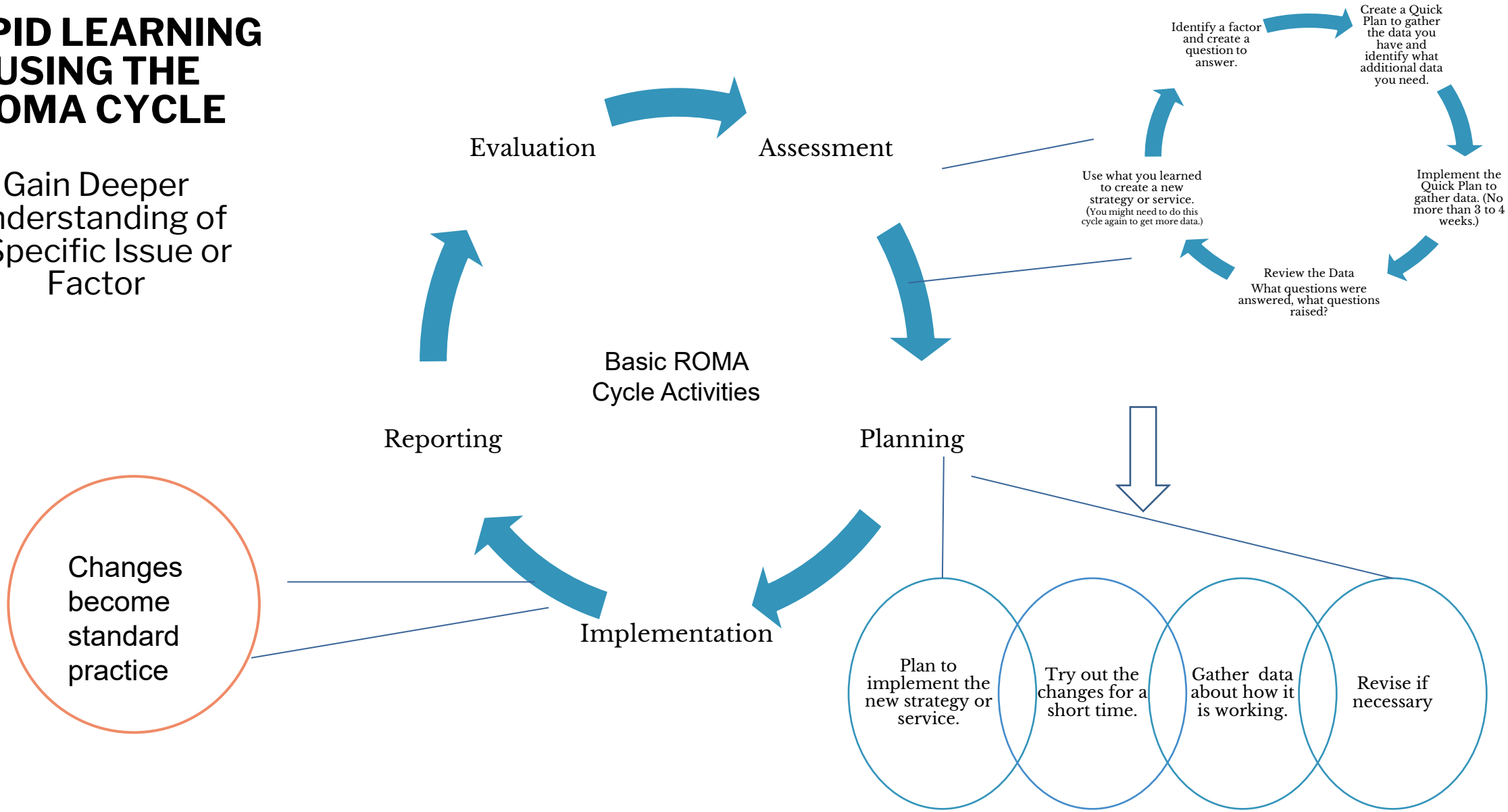
- Respond to missed benchmarks.
- Develop strategies to address challenges.

ADMINISTRATION FOR CHILDREN & FAMILIES
Office of Community Services

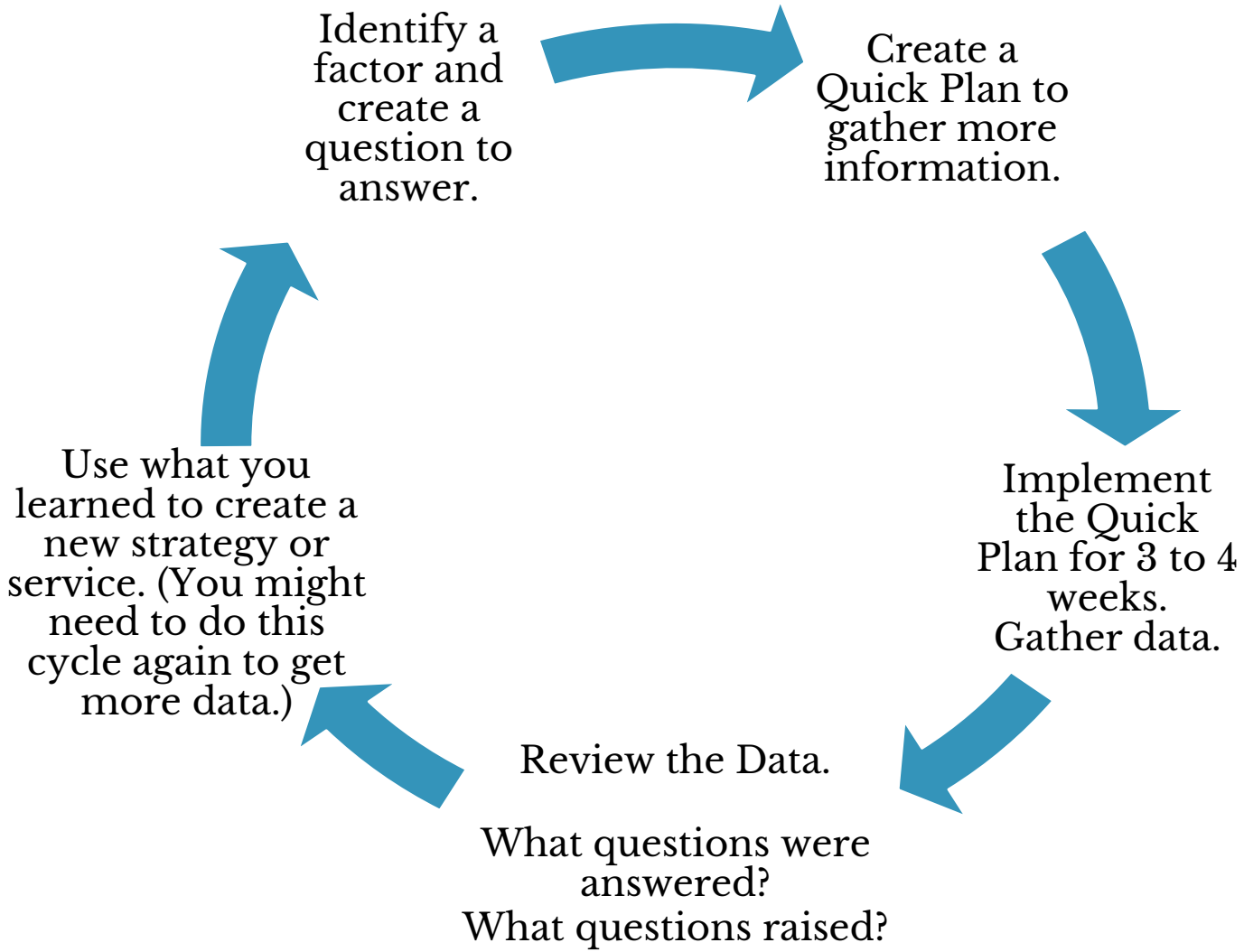
CSBG
Community Services Block Grant

RAPID LEARNING USING THE ROMA CYCLE

Gain Deeper Understanding of a Specific Issue or Factor



Association of Nationally Certified ROMA Professionals


Identify a factor and create a question to answer.
Create a Quick Plan to gather more information.
Implement the Quick Plan for 3 to 4 weeks. Gather data.
Review the Data.
What questions were answered?
What questions raised?
Use what you learned to create a new strategy or service. (You might need to do this cycle again to get more data.)



WHAT IS YOUR AGENCY'S APPROACH TO DATA ANALYSIS?

Avoiding analysis paralysis

For all data analysis processes, you must first clearly state *what* you want to know.

- Do you have questions about agency procedures or policies?
- Was there something on the last report that you wanted to find out more about?
  - For example:
  - A sharp decrease in number of customers served or units of service provided or outcomes reported
  - A budget item that was much higher than prior report have shown
  - An increase in a specific population that received services (more seniors requesting housing assistance)
- Did a staff or board member tell you a story about something they observed in the community that you want to find out more about?

Once you establish **what** you want to know, consider *why* you want to know!

- Is this driven by internal or external factors?
- Are you interested in validation of your Mission or Local Theory of Change?
- Do you think something could be working better?
- Do you want to know if you should strengthen or abandon something that is not producing outcomes?
- Are you not meeting the requirements of a specific funding source?
- Are your reports consistently late or difficult to compile?

Steps to addressing a big problem

Big overwhelming problem (like reduction of poverty) can paralyze the person experiencing it so no activity can be done.

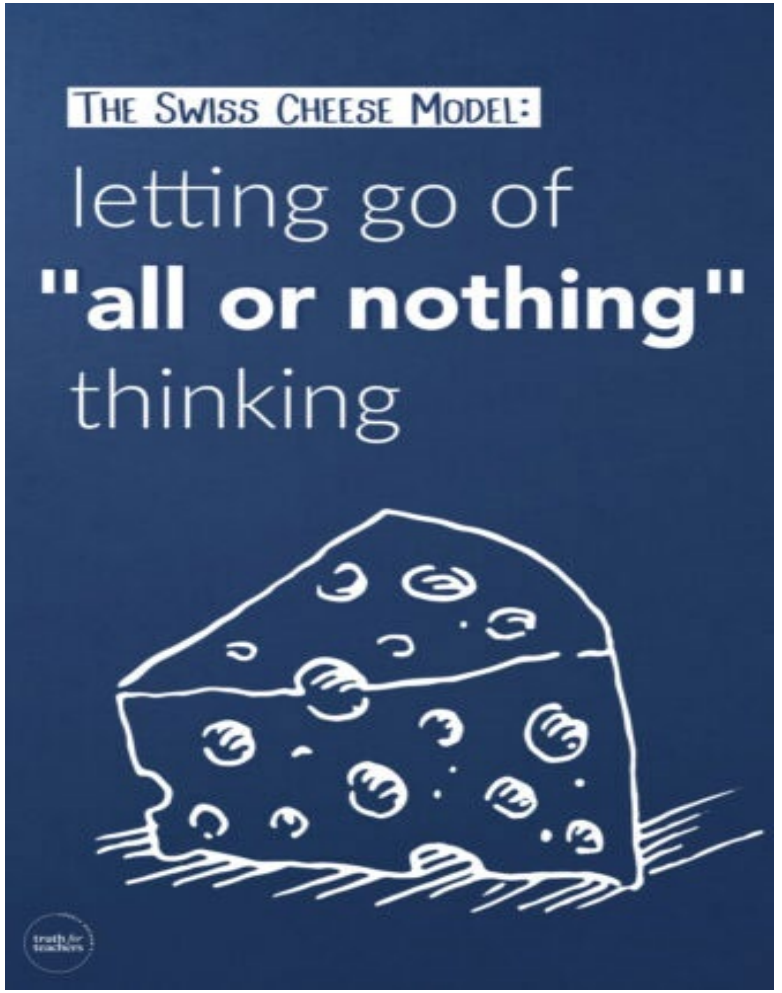
A technique to help address these big problems is called “swiss cheesing”

Stop waiting for the one big fix that will solve all the problems

e.g.: a new data base system.

Think in terms of multiple smaller solutions rather than finding that one big perfect thing that fixes it all forever.

1. Make a list of all the factors that you want to learn about in this problem.
2. Prioritize your list with the biggest and most important factors at the top of the list.
3. "Drill holes" in your big top items.




EXAMPLES

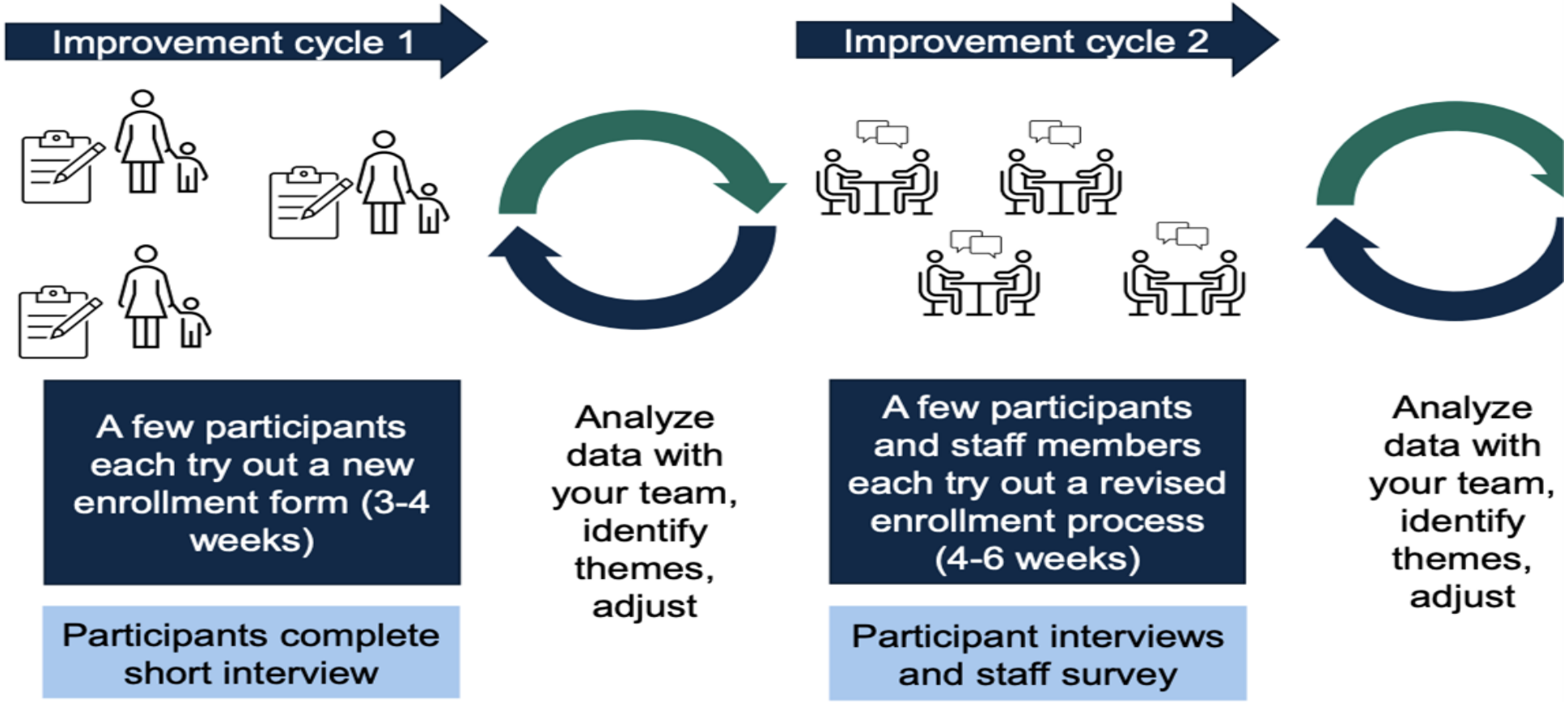
Identified Problem

An agency Parenting Skill Development program has a new population of parents who have Spanish as their first language. We have been successful in recruiting the mothers but not the fathers.

Our question: How might the agency recruit more men who primarily speak Spanish to participate in programming with their partners?

MATHEMATICA/OPRE EXAMPLE

Rapid cycle learning example



Initial rapid-cycle learning plan: Family Service Agency of Santa Barbara

Learning Cycle 1 (September 2021)	**Goal of cycle** Conduct partnership development training and monitor overall success of and skill gains from training.	**Data collection methods** • Pre- and post-training survey with grantee staff • Qualitative feedback from staff
Learning Cycle 2 (September to November 2021)	**Goal of cycle** Assess the success of strategies to increase the number and quality of referral partnerships. Examine whether the number of enrollments increased over time.	**Data collection methods** • Qualitative data from recruitment staff on the use of strategies for developing and maintaining referral partnerships • Qualitative data from partner staff on partnership quality and referral process • Qualitative data from participants on referral process • nFORM data on enrollment
Learning Cycle 3 (November 2021)	**Goal of cycle** Conduct direct outreach, passive recruitment, and word-of-mouth training and monitor overall success of and skill gains from training.	**Data collection methods** • Pre- and post-training survey with grantee staff • Qualitative feedback from staff



SETTING UP A RAPID ROMA PROJECT

What do you want to know?

Creating the Conditions for your project



ENGAGE OTHERS WHO ARE INTERESTED IN THE TOPIC.



BE SURE TO HAVE ORGANIZATIONAL SUPPORT.



CREATE A SENSE OF URGENCY AROUND THE TOPIC TO BE EXPLORED.



Core Team Members and Supporters

Who is with you?

You don’t want to do this kind of project alone!

How do you decide what to do?

- Pick something that isn't going to damage your current programing.
  - For instance, don't start with closing a service site to see what kind of impact that will have.
  - Rather, consider a test that will help you find out what would happen if the site was closed by using some interviews and other explorative activities – before you do anything drastic. Important!

***** Be sure to pick something that is in your control, or that you have influence over changing! *****

Some topic areas for this kind of data analysis

- Implementation challenges in areas such as recruitment, participation, and program completion.
- Areas related to data collection, storage and retrieval.
- Processes related to intake and delivery of services
- Time frame for follow up (or lack of it)
- Tools and processes for measuring success



A SAMPLING OF QUESTIONS YOU MIGHT WANT TO ANSWER WITH YOUR DATA

- Did we do what we thought we would do?
- Did we serve the population we thought we would serve?
- Did we make an impact on the identified needs?
- Can we tell what services (or set of services) produced the best opportunity for results?
- Are some populations achieving outcomes at different rates than others?
- Did we recruit and enroll sufficient numbers to allow us to achieve our target outcomes?
- Do we need additional resources?
- Was there something unexpected that influenced the outcomes?

Is it good?

Clarify what you are looking for

If we assisted 100 people to secure employment, is that good?

- Define what we mean by “assisted.”
- How is “employment” defined?
- What do other agencies who have employment as an outcome achieve?
  - Are our populations similar?
  - How might differences in population impact differences in outcomes?
- What kind of services are provided by others? How do these compare with ours? How might the services impact differences in outcomes?



COLLECTING DATA

Once you have identified what you want to know more about, it is time to collect data to help you understand the issue.

Create a Plan

Be sure to include

- who will be involved in collecting and analyzing the data,
- what resources you need,
- action steps for data collection,
- the time frame you will set aside to collect data.

Gathering Data



Don’t assume you know what all is involved in the situation you have identified.



Consider developing a list of the kinds of data **you have** available that could shed light on the situation.



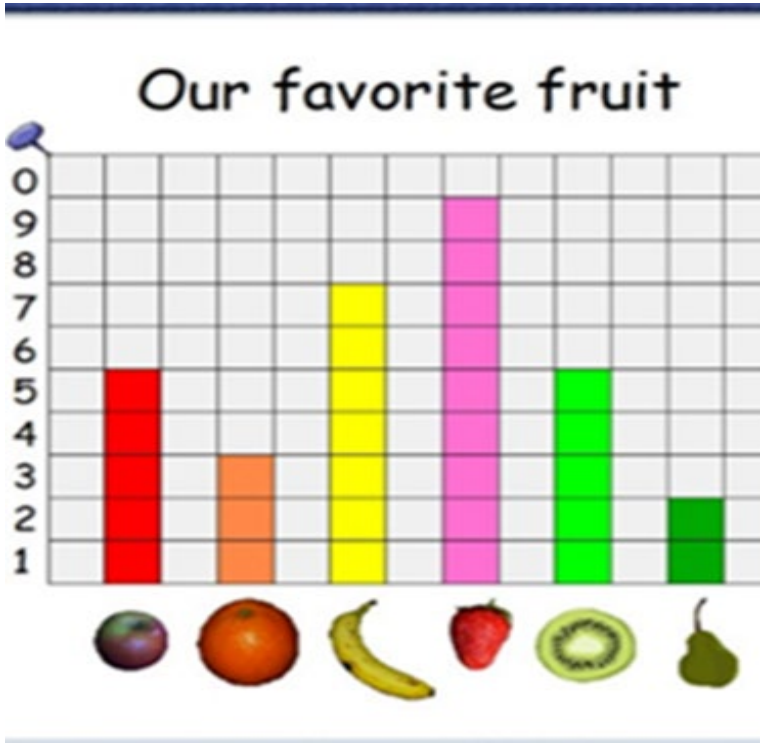
Think about the data that you **don’t have** that would be useful

USE AVAILABLE DATA

- Quantitative data in CSBG Annual Report
- Other Quantitative data
  - agency data
  - Census data, etc.
- Qualitative data
- Understanding measurement tools and processes

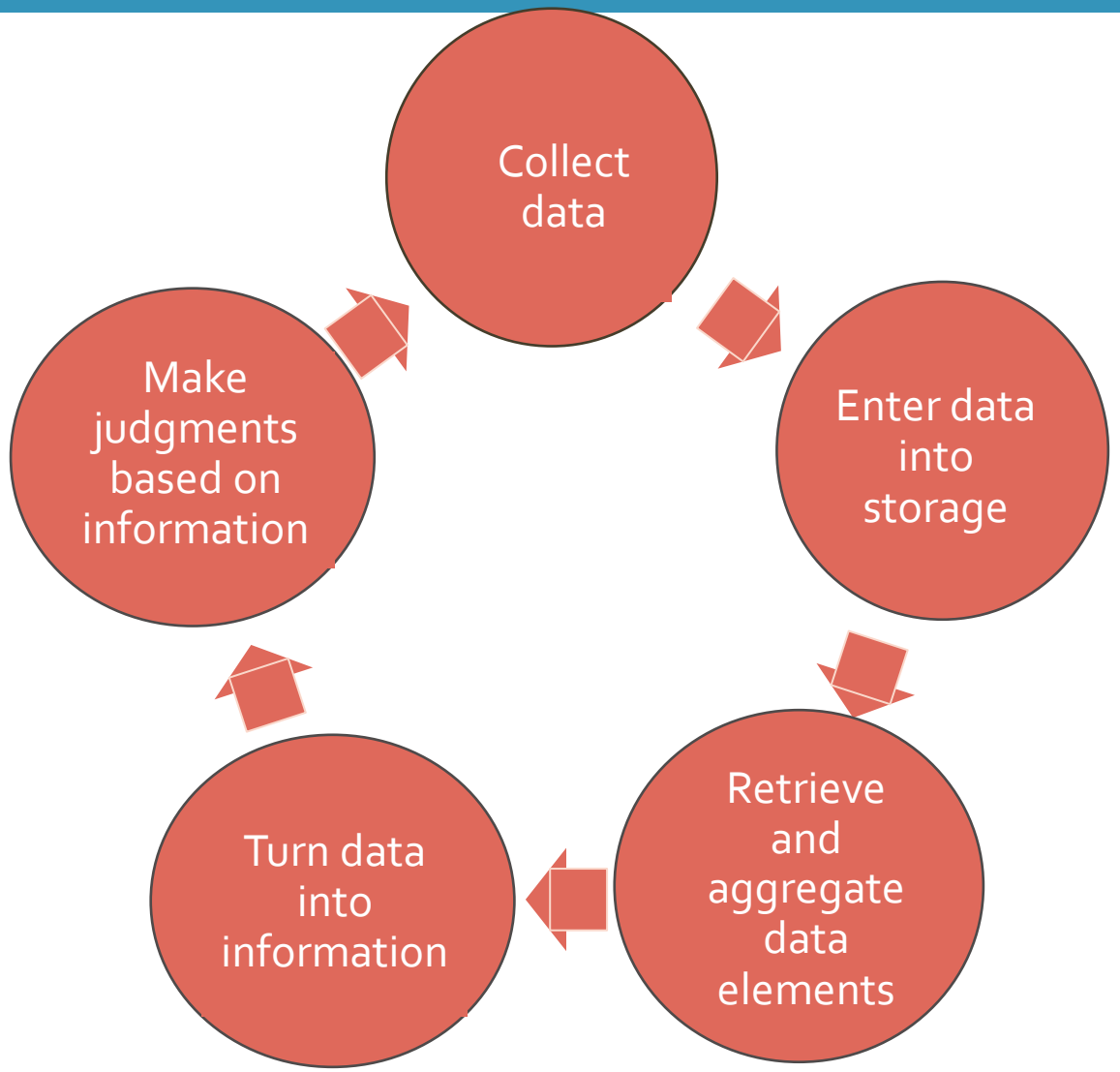
Preparing the data for analysis

- Aggregate data to find out what is happening most often.
- What are the factors that contribute to the happening?



Why Analyze Data?

- Remove outliers or obvious errors
- Question missing data
- Define, clarify the context
- Make comparisons
- Create a visualization of the data



ERRORS CAN HAPPEN ALL ALONG THE LIFE CYCLE OF DATA

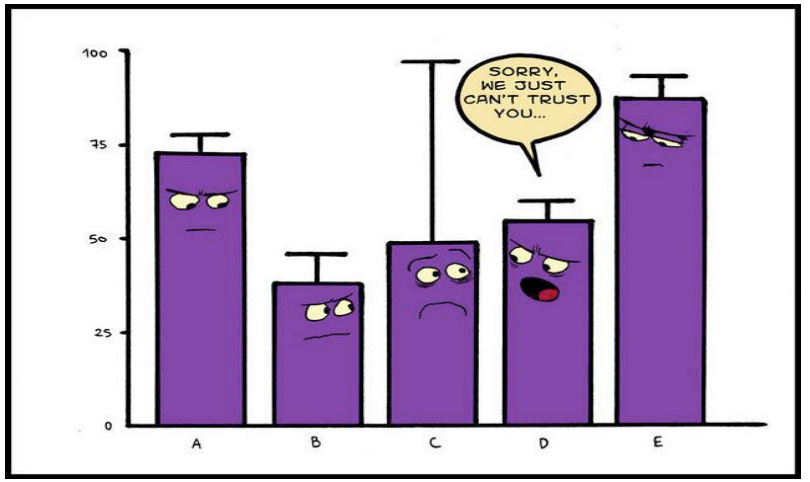
If the data is not accurate or complete, the information we derive from the data is not accurate.

- We cannot make reliable judgments or develop reliable knowledge from the information.
- And if we try to use the knowledge, errors will appear as soon as it is tested.

Bad data costs time and effort, gives false impressions, results in poor forecasts and devalues everything else in the data life cycle.

If you take action based on faulty data, you have made a poor decision, and you will suffer the consequence later!

WHAT IF THE DATA IS FLAWED?



USE YOUR KNOWLEDGE TO LOOK BEYOND BASIC DATA TO SEE RELATIONSHIPS

Examine elements to determine how or if they are related.

- Multiple variables can be observed to find patterns.
- For example: How are income, education and occupation associated with socioeconomic status? Which factors most influence socioeconomic status?

Examine the influence of underlying causes and conditions.

- Relationship among the effects may be the result of the same factors influencing the situation.
- Unrelated factors can be discounted as the root cause of the effect.

After you have gathered data and made meaning out of it, you will design an action to test.

The action is something that you feel will improve the situation you are tackling.

- Who will design the improvements to be tested?
- What outputs or outcomes will be monitored?
- What comparisons will be used to identify the value of the test improvements?

Why test?



Testing changes helps you build your knowledge about what works in your system, and why. The most important thing about testing is that you have a theory. Each time you do a test you need to make a prediction about what will happen. If the prediction is wrong, then you need to adjust your theory. Simply trying changes without a prediction is not testing and does not help build knowledge.



As you build your knowledge about a change you will want to test it under different conditions to see if your theory still holds with different people, shifts, or circumstances. As you build your testing you will get more confident in your predictions, develop the change within your context and increase your degree of belief in the change.

The ROMA cycle is shorthand for testing a change

- By identifying a specific change, planning it, trying it, observing the results, and acting on what is learned you are engaged in "the scientific method," used for action-oriented learning.
- Using the ROMA cycle on this level involves testing new change ideas on a small scale and building knowledge iteratively.
- A test does not equate to a change idea. You will likely need several cycles of tests about each change idea to really understand whether and why it works.
- It is important to reflect on your tests and record your reflections so that the learning is not lost.

IMPLEMENT THE PROPOSED SOLUTION

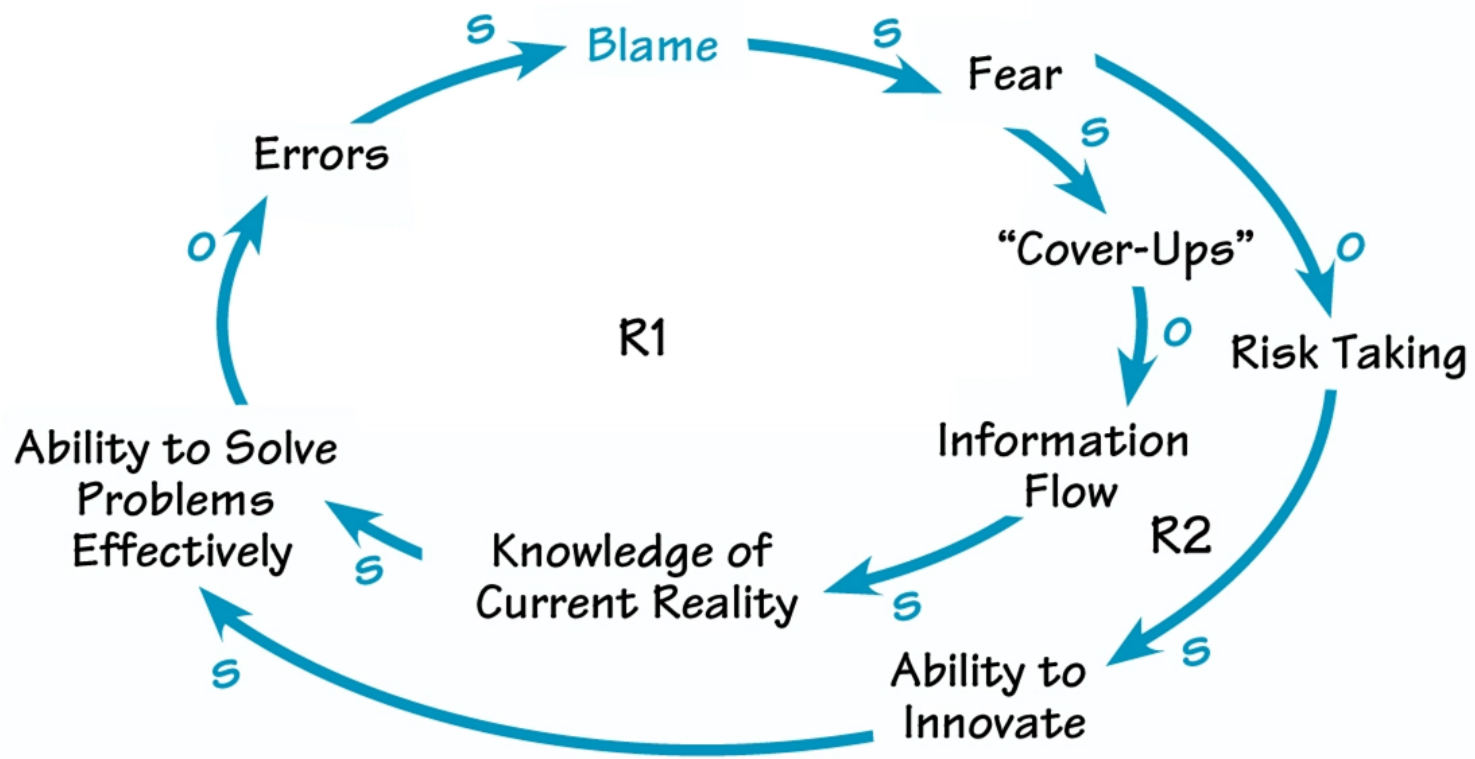
Once you have a proposed action to address the item you have identified, you have to **move that action into reality**.

Sometimes there is a "fear factor" related to the proposed solution.

Sometimes the solution requires approval before it can be tried, and that can lead to delays in the project.

YOU MUST OVERCOME THE BARRIERS OF MOVING FROM PLANNING TO ACTION





Failure to Act

Fear of failure
Lack of support/approval
Disrupting the Status Quo

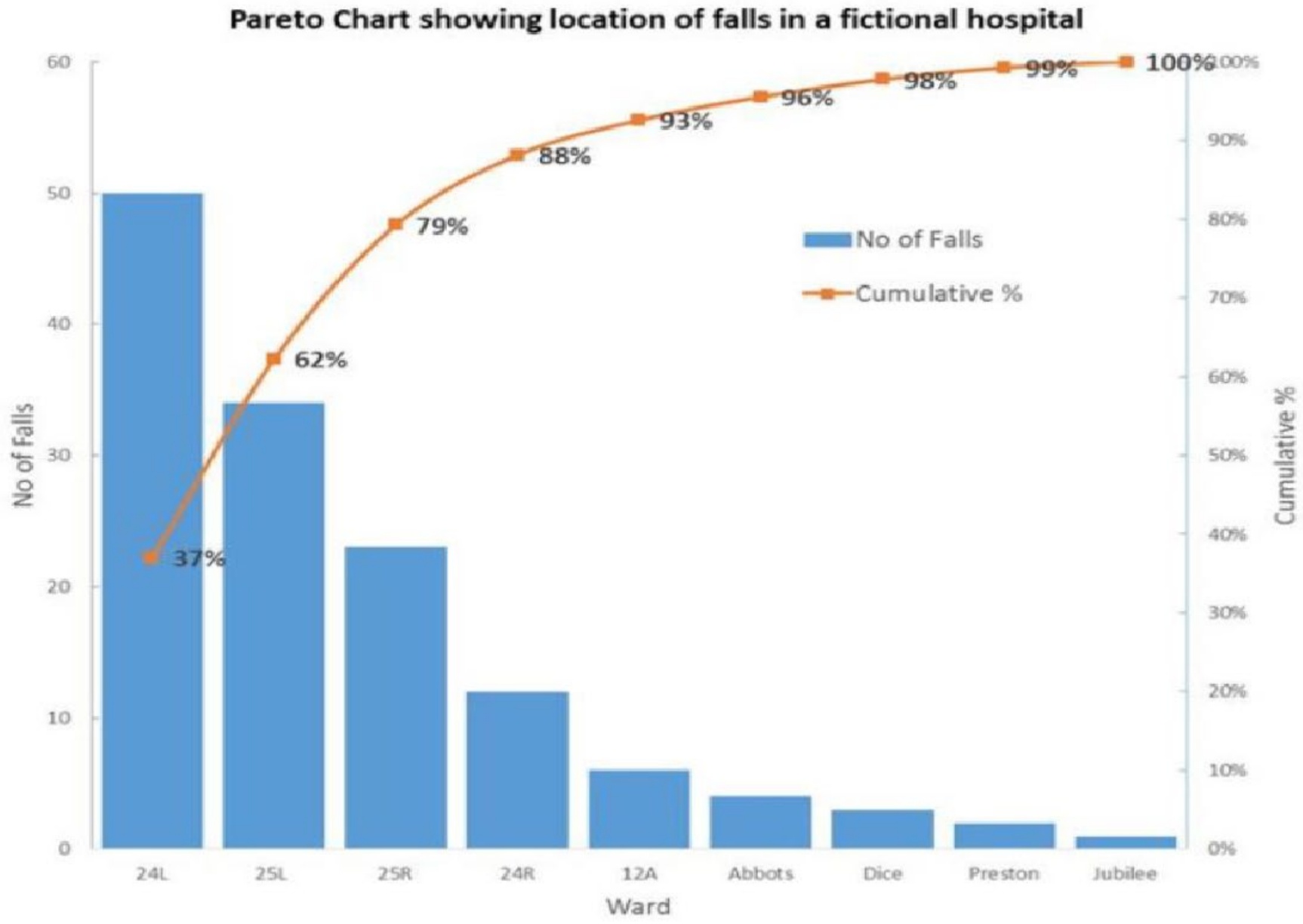


TOOLS TO HELP YOU IDENTIFY YOUR FOCUS

Charts and tables and lists, oh my!

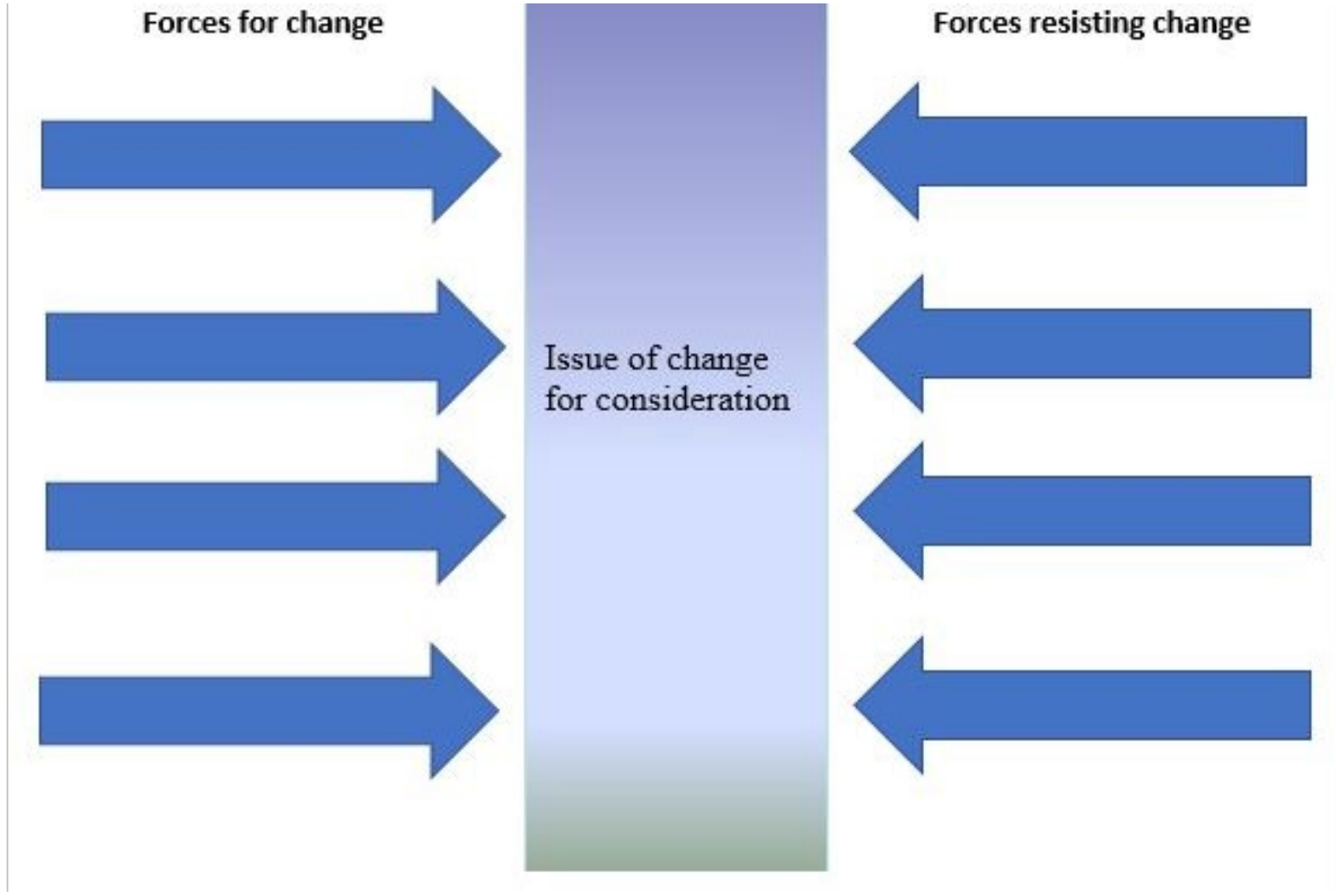
What is the most frequent occurrence related to the issue?

- Using a Pareto chart helps a team concentrate its improvement efforts on the factors that have the greatest impact. It also helps a team communicate the rationale for focusing on certain areas.
- For example, you might want to look at
  - Type of incidents that occur
  - Causes of a specific type of problem
  - Reasons for a specific situation (cancellation, no engagement)
- They are a useful tool not only when identifying opportunities for improvement, but also in drilling down to understand the reasons for special causes on graphs showing counts, percentages and rates.


Pareto Chart showing location of falls in a fictional hospital
No of Falls
Cumulative %
37%
62%
79%
88%
93%
96%
98%
99%
100%
60
50
40
30
20
10
0
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
24L
25L
25R
24R
12A
Abbots
Dice
Preston
Jubilee
Ward

Force Field Analysis

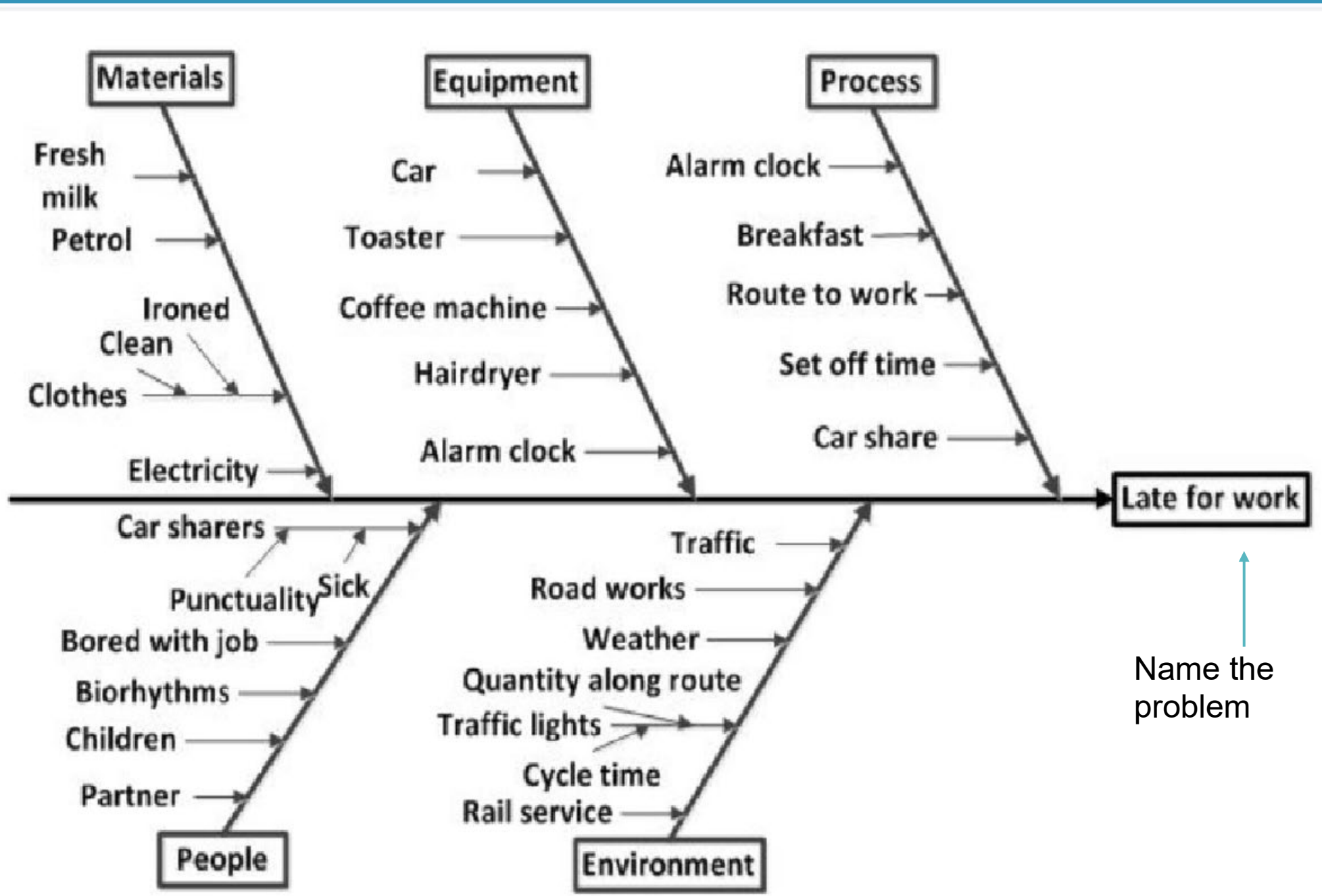
- This process frames problems in terms of factors or pressures that support the status quo (restraining forces) and those pressures that support change in the desired direction (driving forces).
- The driving forces must be strengthened, or the resisting forces weakened for the change to take effect.
- Example of factors can be people, resources, attitudes, traditions, regulations, values, needs, desires, etc.
- As a tool for managing change, Force Field Analysis helps identify those factors that must be addressed and monitored if change is to be successful.

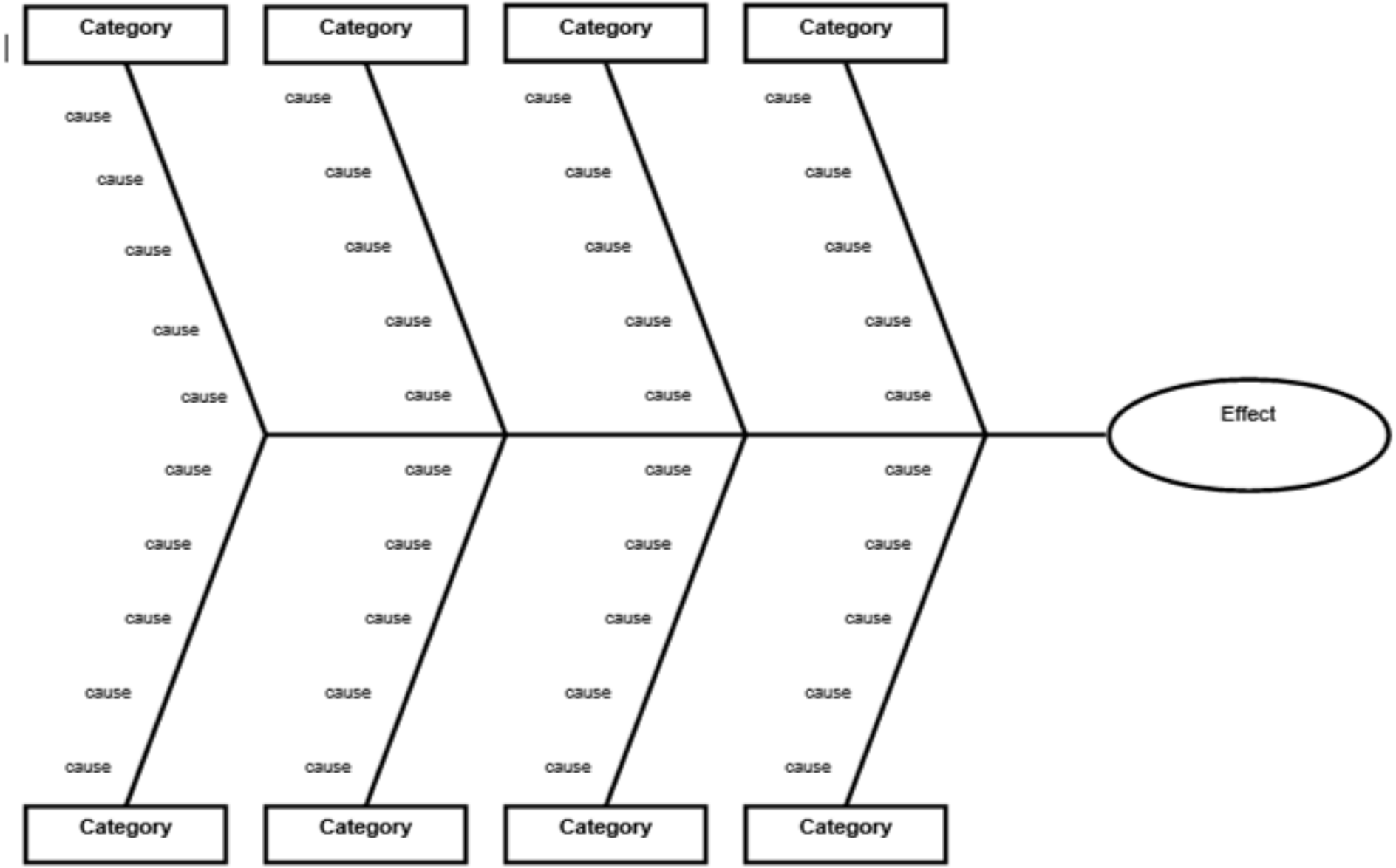

Forces for change
Forces resisting change
Issue of change for consideration

Cause and Effect diagram

A visual display that includes:

- The name of the problem stated a way that does not pre-judge its causes.
- Major cause areas / categories for the causes of the problem, for example materials, processes, people, environment and equipment
- The reasons and root causes associated with each category / cause area
- Possible solutions for each root cause
- A cause and effect diagram is sometimes called a fishbone diagram after its resemblance to the bones of a fish or an Ishikawa diagram after its creator


Materials
Fresh milk
Petrol
Ironed
Clean
Clothes
Electricity
Equipment
Car
Toaster
Coffee machine
Hairdryer
Alarm clock
Process
Alarm clock
Breakfast
Route to work
Set off time
Car share
Late for work
Car sharers
Punctuality
Sick
Bored with job
Biorhythms
Children
Partner
People
Traffic
Road works
Weather
Quantity along route
Traffic lights
Cycle time
Rail service
Environment
Name the problem


Category
Category
Category
Category
cause
Effect
Category
Category
Category
Category

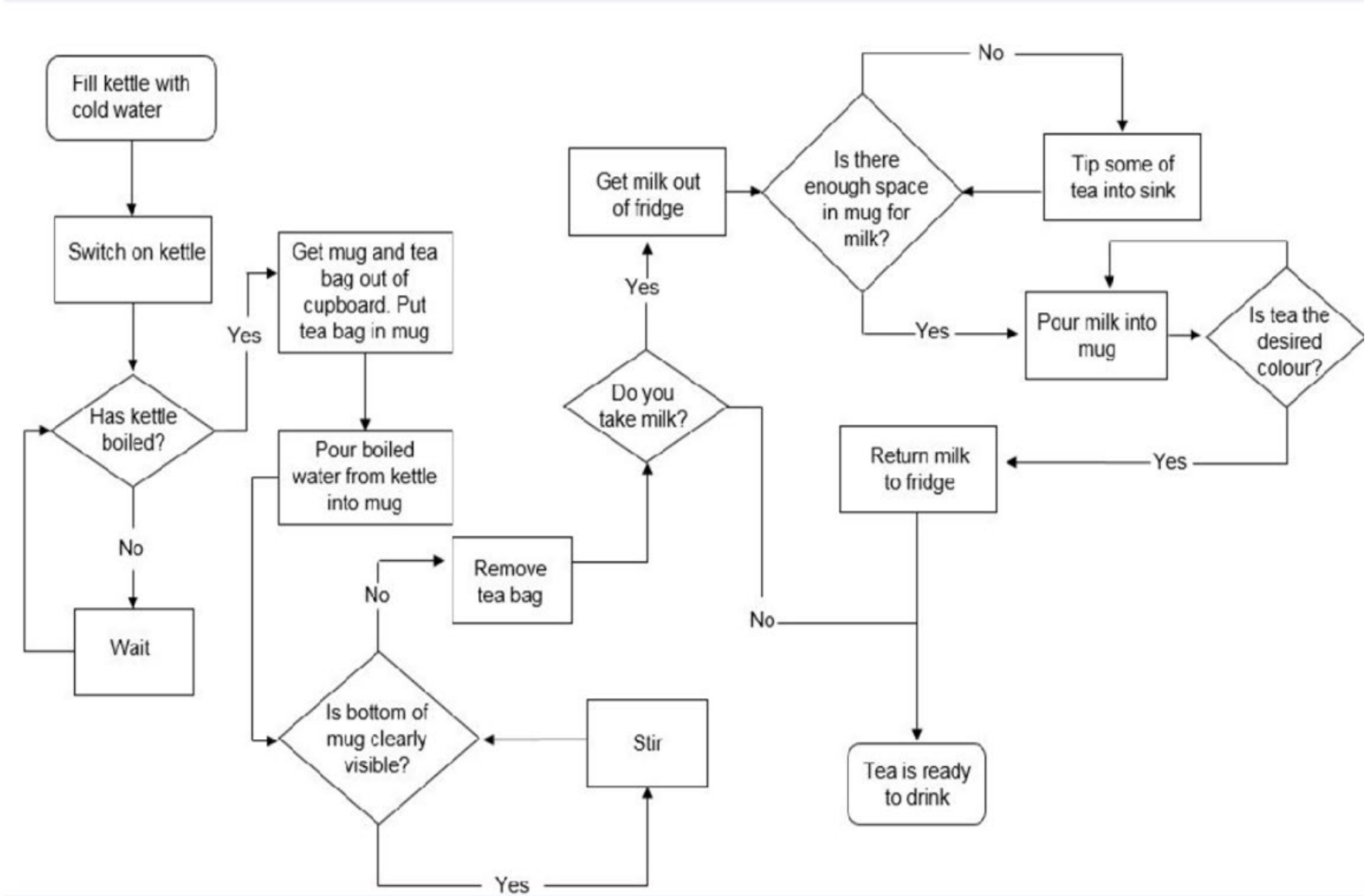
Understanding your system

- If you want different outcomes, you need to understand how the system is **currently working**. Use this knowledge to help them identify the right improvements to make changes where they are needed.

- "**Policies and systems**," rules that govern how services are delivered and tools or methods used to deliver services.
  - For example, eligibility criteria for programs, screening or intake tools, shift hours at a major employer that conflict with when childcare is available, etc.

- "**Resources**," financial and other resources that are needed not just to launch your changes but to sustain them over time.
  - For example, statewide TANF waiver that could bring in some dollars for your organization/partnership, or figuring out some way to borrow executives from a local company to get your systems up and running, or how to qualify for and recruit AmeriCorps volunteers to supplement your staff – etc.!

Journey Mapping



Process map example - Making a cup of Tea

RAPID ROMA TIME-TABLE



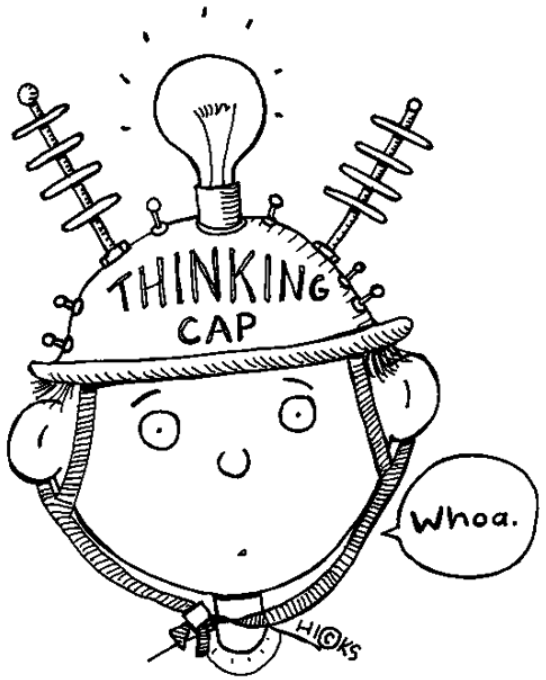
- Assessment – what do you have documented about the past 100 days? Does something need to change?
- Planning – Do plans need to be adjusted?
- Implementation – Even though the implementation period could be 1 year or even 2 years, you could identify a small portion of implementation to review.
- Reporting – internal reporting monthly will give you the data you need to assure you are on the right path.
- Analysis of data – are you doing what you expect to do? Are you reaching the right people? Have you made any difference?
- Re-assessment – asking new questions will deepen understanding.

Rapid Cycle Learning



NEXT STEPS

- **Identify something you want to explore**
- Create your data collection plan (including a timetable)
- Conduct your first cycle of data collection and analysis
- Based on your analysis, identify a change that you could try out to address the issue.
- Try out the change and collect more data!



CLOSING THOUGHTS

For more information

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