STD Management Coaching Evaluation: Evaluation and Program Improvement Capacity (EPIC) Project

NNPHI Evidence to Action Team

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STD Management Coaching Experience

• A community of practice approach equipping STD program staff with knowledge and skills in program improvement.

• 24 participating local health departments

• Activities include:
  • Coaching video conference sessions between sites and their assigned coach.
  • Peer video conference calls for all participating coaches.
  • In-person learning exchange for coaches and sites held in Atlanta, GA.
  • Ongoing coaching connections via electronic communications.
Participant Capacity

Pre-Survey Findings
Pre-Survey Findings

Strength and Personal Improvement (n=30)

I clearly understand areas of personal strength that allow me to effectively conduct evaluation and program improvement.

- Strongly Agree: 3%
- Agree: 67%
- Neither agree nor disagree: 20%
- Disagree: 10%

I clearly understand areas of personal improvement needed to more effectively conduct evaluation and program improvement.

- Strongly Agree: 7%
- Agree: 57%
- Neither agree nor disagree: 23%
- Disagree: 13%

0% 10% 20% 30% 40% 50% 60% 70% 80%

Strongly Agree • Agree • Neither agree nor disagree • Disagree
Pre-Survey Findings

Scientific Methods and Strategic Decisions (n=25)

Plan and use scientific methods to inform and assess program improvement efforts, including qualitative methods and quality improvement methods

- 24% can be successful now in using what I know.
- 16% need more experience to be good at using what I know.
- 16% need more guidance before I know how to use what I know.
- 4% are still unclear about what to do or why to do it.

- 56% need more experience to be good at using what I know.
- 4% are still unclear about what to do or why to do it.

Make strategic decisions about what to focus on for program improvement, including conducting comprehensive program reviews (i.e. data driven reviews)

- 24% can be successful now in using what I know.
- 16% need more experience to be good at using what I know.
- 16% need more guidance before I know how to use what I know.
- 4% are still unclear about what to do or why to do it.

- 56% need more experience to be good at using what I know.
- 4% are still unclear about what to do or why to do it.
Pre-Survey Findings

Engage Leaders and Use Findings (n=25)

Engage leadership and stakeholders to create and sustain a supportive environment for program inquiry and change, including effective facilitation and project management strategies:

- I can perform now at an expert level in using what I know: 4%
- I can be successful now in using what I know: 16%
- I need more experience to be good at using what I know: 20%
- I need more guidance before I know how to use what I know: 56%

Make use of any findings and insights, including the appropriate interpretation of data and the effective communication, discussion, and implementation of results:

- I can perform now at an expert level in using what I know: 4%
- I can be successful now in using what I know: 32%
- I need more experience to be good at using what I know: 24%
- I need more guidance before I know how to use what I know: 40%
Pre-Survey Findings

Knowledge in Key Areas (n=25)

- Leadership and Systems Thinking Skills
  - Expert Knowledge: 0%
  - Advanced Knowledge: 4%
  - Intermediate Knowledge: 28%
  - Some Knowledge: 32%
  - No Knowledge: 36%

- Evidence-Informed Program Planning Skills
  - Expert Knowledge: 0%
  - Advanced Knowledge: 4%
  - Intermediate Knowledge: 24%
  - Some Knowledge: 32%
  - No Knowledge: 40%

- Analytical/Assessment Skills
  - Expert Knowledge: 1%
  - Advanced Knowledge: 4%
  - Intermediate Knowledge: 16%
  - Some Knowledge: 28%
  - No Knowledge: 48%

- Program Improvement
  - Expert Knowledge: 0%
  - Advanced Knowledge: 4%
  - Intermediate Knowledge: 16%
  - Some Knowledge: 28%
  - No Knowledge: 52%

Legend:
- Green: Expert Knowledge
- Light Blue: Advanced Knowledge
- Purple: Intermediate Knowledge
- Dark Blue: Some Knowledge
- Blue: No Knowledge
Pre-Survey Findings

Confidence in Key Areas (n=25)

- **Leadership and Systems Thinking Skills**: 8% Really Confident, 28% Confident, 52% Unsure, 4% Not Confident, 4% Really Not Confident

- **Evidence-Informed Program Planning Skills**: 4% Really Confident, 8% Confident, 40% Unsure, 44% Not Confident, 4% Really Not Confident

- **Analytical/Assessment Skills**: 0% Really Confident, 16% Confident, 28% Unsure, 52% Not Confident, 4% Really Not Confident

- **Program Improvement**: 4% Really Confident, 16% Confident, 24% Unsure, 56% Not Confident, 4% Really Not Confident
Pre-Survey Findings

Managerial Skill in Key Areas (n=25)

- **Leadership and Systems Thinking Skills**
  - No Skill: 16%
  - Some Skill: 16%
  - Intermediate Skill: 16%
  - Advanced Skill: 28%
  - Expert Skill: 32%

- **Evidence-Informed Program Planning Skills**
  - No Skill: 16%
  - Some Skill: 16%
  - Intermediate Skill: 16%
  - Advanced Skill: 24%
  - Expert Skill: 32%

- **Analytical/Assessment Skills**
  - No Skill: 8%
  - Some Skill: 16%
  - Intermediate Skill: 24%
  - Advanced Skill: 24%
  - Expert Skill: 28%

- **Program Improvement**
  - No Skill: 16%
  - Some Skill: 20%
  - Intermediate Skill: 28%
  - Advanced Skill: 36%
  - Expert Skill: 36%
Pre-Survey Findings

Years of Experience in STD Programs or Services (n=25)

- 1 - 5 years: 52%
- 6 - 10 years: 8%
- 11 - 15 years: 20%
- More than 15 years: 20%
What Main Benefits Do You Seek to Gain From This Coaching Experience? (n=25)

- Gain/enhance ability to evaluate programs
- Increase knowledge and confidence to implement program improvement and quality improvement
- Refresh previously acquired skills
- Gain skills to bring back to employees/team members
- Build skills as a new member of the public health workforce
Participant Capacity

Learning Session Findings
Session 1 – Program Planning

To what extent did this virtual learning session increase your ability to (n=17):

- Identify resources that can help facilitate improvement project development and implementation
  - To a great extent: 6%
  - To a moderate extent: 29%
  - To some extent: 53%
  - To no extent: 12%

- Describe strategies for the early stage of an improvement project
  - To a great extent: 0%
  - To a moderate extent: 24%
  - To some extent: 24%
  - To no extent: 53%

- Distinguish between quality improvement, quality assurance, and evaluation
  - To a great extent: 6%
  - To a moderate extent: 24%
  - To some extent: 71%
  - To no extent: 0%
Session 1 – Program Planning

To what extent did this virtual learning session increase your confidence to carry out a function(s) of a program improvement project? (n=17)

- To a great extent: 12%
- To a moderate extent: 53%
- To some extent: 24%
- To no extent: 12%
Please rate your level of agreement with the following statements (n=17):

- I was satisfied with this session overall.
  - Strongly Agree: 29%
  - Agree: 71%

- My understanding of the subject matter has improved as a result of this session.
  - Strongly Agree: 24%
  - Agree: 59%

- There were enough opportunities for questions and discussion.
  - Strongly Agree: 6%
  - Agree: 53%

- The material was presented in an engaging way.
  - Strongly Agree: 41%
  - Agree: 59%

- The information was presented in ways I could clearly understand.
  - Strongly Agree: 47%
  - Agree: 53%

- The presenter(s) was knowledgeable about the subject matter.
  - Strongly Agree: 41%
  - Agree: 59%

The presenter(s) was knowledgeable about the subject matter.
Session 2 – Getting the most out of coaching

To what extent did this virtual learning session increase your ability to (n=13):

Identify tips for getting the most out of a coaching session
- To a great extent: 15%
- To a moderate extent: 38%
- To some extent: 23%
- To no extent: 8%

Identify quality improvement tools
- To a great extent: 15%
- To a moderate extent: 38%
- To some extent: 23%
- To no extent: 23%

0% 5% 10% 15% 20% 25% 30% 35% 40%

To a great extent  To a moderate extent  To some extent  To no extent
Session 2 – Getting the most out of coaching

To what extent did this virtual learning session increase your confidence to carry out a function(s) of a program improvement project? (n=13)
The presenter(s) was knowledgeable about the subject matter.
The information was presented in ways I could clearly understand.
The material was presented in an engaging way.
There were enough opportunities for questions and discussion.
My understanding of the subject matter has improved as a result of this session.
I was satisfied with this session overall.

Please rate your level of agreement with the following statements (n=13):

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Session 2 – Getting the most out of coaching
To what extent did this virtual learning session expose you to new evaluation approaches? (n=9)

- To a great extent: 33%
- To a moderate extent: 22%
- To some extent: 44%
- To no extent: 0%
To what extent did this virtual learning session increase your confidence to carry out a function(s) of a program improvement project? (n=9)

- To a great extent: 22%
- To a moderate extent: 33%
- To some extent: 44%
- To no extent: 0%
Session 3 – Non-Traditional Evaluation

Please rate your level of agreement with the following statements (n=9):

- I was satisfied with this session overall.
  - Strongly Agree: 11%
  - Agree: 44%
  - Neutral: 44%

- My understanding of the subject matter has improved as a result of this session.
  - Strongly Agree: 11%
  - Agree: 44%
  - Neutral: 44%

- There were enough opportunities for questions and discussion.
  - Strongly Agree: 22%
  - Agree: 22%
  - Neutral: 56%

- The material was presented in an engaging way.
  - Strongly Agree: 22%
  - Agree: 33%
  - Neutral: 44%

- The information was presented in ways I could clearly understand.
  - Strongly Agree: 11%
  - Agree: 44%
  - Neutral: 44%

- The presenter(s) was knowledgeable about the subject matter.
  - Strongly Agree: 11%
  - Agree: 44%
  - Neutral: 44%
To what extent did this virtual learning session expose you to new evaluation approaches? (n=12)

- To a great extent: 17%
- To a moderate extent: 33%
- To some extent: 17%
- To no extent: 33%
To what extent did this virtual learning session increase your confidence to carry out a function(s) of a program improvement project? (n=12)
The presenter(s) was knowledgeable about the subject matter.

My understanding of the subject matter has improved as a result of this session.

There were enough opportunities for questions and discussion.

The material was presented in an engaging way.

The information was presented in ways I could clearly understand.

The presenter(s) was knowledgeable about the subject matter.

Please rate your level of agreement with the following statements (n=6)

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Session 4 – Health Department Panel
To what extent did this virtual learning session increase your confidence to carry out a function(s) of a program improvement project? (n=10)

- To a great extent: 30%
- To a moderate extent: 30%
- To some extent: 30%
- To no extent: 10%
Session 5 - Maintaining QI Momentum

Please rate your level of agreement with the following statements (n=10)

- I was satisfied with this session overall.
  - Strongly Agree: 0%
  - Agree: 50%
  - Neutral: 50%

- My understanding of the subject matter has improved as a result of this session.
  - Strongly Agree: 0%
  - Agree: 40%
  - Neutral: 50%
  - Disagree: 10%

- There were enough opportunities for questions and discussion.
  - Strongly Agree: 0%
  - Agree: 40%
  - Neutral: 50%
  - Disagree: 10%

- The material was presented in an engaging way.
  - Strongly Agree: 0%
  - Agree: 60%
  - Neutral: 40%

- The information was presented in ways I could clearly understand.
  - Strongly Agree: 0%
  - Agree: 30%
  - Neutral: 70%

- The presenter(s) was knowledgeable about the subject matter.
  - Strongly Agree: 0%
  - Agree: 60%
  - Neutral: 40%
Participant Capacity

Post-Survey Findings
I clearly understand areas of personal strength that allow me to effectively do my job.

- 50% Strongly Agree
- 42% Agree
- 8% Neither agree nor disagree

I clearly understand areas of personal improvement needed to more effectively do my job.

- 33% Strongly Agree
- 58% Agree
- 8% Neither agree nor disagree
Post-Survey Findings

Scientific Method and Strategic Decisions (n=12)

Plan and use scientific methods to inform and assess program improvement efforts, including qualitative methods and quality improvement methods

- 58% can be successful now in using what they know.
- 33% need more experience to be good at using what they know.
- 8% need more guidance before they know how to use what they know.

Make strategic decisions about what to focus on for program improvement, including conducting comprehensive program reviews (i.e. data driven reviews)

- 75% can be successful now in using what they know.
- 25% need more experience to be good at using what they know.
- 8% need more guidance before they know how to use what they know.
Post-Survey Findings

Engage Leaders and Use Findings (n=12)

Engage leadership and stakeholders to create and sustain a supportive environment for program inquiry and change, including effective facilitation and project management strategies.

Make use of any findings and insights, including the appropriate interpretation of data and the effective communication, discussion, and implementation of results.

- I can perform now at an expert level in using what I know. 75%
- I can be successful now in using what I know. 42%
- I need more guidance to be good at using what I know. 25%
Post-Survey Findings

Knowledge in Key Areas (n=12)

Change Management Skills
- Expert Knowledge: 0%
- Advanced Knowledge: 8%
- Intermediate Knowledge: 17%
- Some Knowledge: 25%
- Total: 50%

Evidence-Informed Program Planning Skills
- Expert Knowledge: 0%
- Advanced Knowledge: 8%
- Intermediate Knowledge: 25%
- Some Knowledge: 67%

Analytical/Assessment Skills
- Expert Knowledge: 0%
- Advanced Knowledge: 8%
- Intermediate Knowledge: 17%
- Some Knowledge: 67%

Program Improvement
- Expert Knowledge: 0%
- Advanced Knowledge: 8%
- Intermediate Knowledge: 25%
- Some Knowledge: 67%
Post-Survey Findings

Confidence in Key Areas (n=12)

- **Change Management Skills**: 8% Some Confidence, 17% Intermediate Confidence, 33% Advanced Confidence, 42% Expert Confidence
- **Evidence-Informed Program Planning Skills**: 0% Some Confidence, 17% Intermediate Confidence, 17% Advanced Confidence, 67% Expert Confidence
- **Analytical/Assessment Skills**: 8% Some Confidence, 8% Intermediate Confidence, 25% Advanced Confidence, 58% Expert Confidence
- **Program Improvement**: 8% Some Confidence, 17% Intermediate Confidence, 67% Advanced Confidence, 67% Expert Confidence
Post-Survey Findings

Managerial Skills in Key Areas (n=12)

- **Change Management Skills**
  - Not relevant to my position: 0%
  - Some Skill: 8%
  - Intermediate Skill: 17%
  - Advanced Skill: 25%
  - Expert Skill: 50%

- **Evidence-Informed Program Planning Skills**
  - Not relevant to my position: 0%
  - Some Skill: 8%
  - Intermediate Skill: 17%
  - Advanced Skill: 25%
  - Expert Skill: 58%

- **Analytical/Assessment Skills**
  - Not relevant to my position: 0%
  - Some Skill: 8%
  - Intermediate Skill: 8%
  - Advanced Skill: 8%
  - Expert Skill: 8%

- **Program Improvement**
  - Not relevant to my position: 0%
  - Some Skill: 8%
  - Intermediate Skill: 25%
  - Advanced Skill: 50%
  - Expert Skill: 50%
Post-Survey Findings

Which statements are true about your experience in this project? (n=28)

- 39%: I offered to share a resource from my coaching experience with a peer.
- 32%: I shared insights from my job/coaching experience with a peer.
- 21%: I used social media (e.g. Basecamp) to share or connect with peers.
- 4%: I experienced meaningful peer interaction in another way.
- 4%: I did not have meaningful peer interaction.
What were the primary benefits that you gained from this project overall? (n=35)

- Just being able to talk through issues with my coach (31%)
- How to apply tools provided by my coach or other coaches (14%)
- Advice from my coach about how to tackle particular challenges or issues (20%)
- Learning from/connecting with other health departments (6%)
- How this project brought together my team or colleagues in my health department (3%)
- We were able to make real progress on a program improvement or evaluation (26%)
Post-Survey Findings

Years of Experience in STD Programs or Services (n=12)

- 1-5 years: 58%
- 6-10 years: 33%
- 11-15 years: 8%
- More than 15 years: 0%
“I found the instruction from the webinars to be very beneficial. As someone with very little program improvement/evaluation experience, I appreciated the instruction and actually wish more time was devoted to that.”

“Our coach was extremely helpful in making us think about aspects we had not considered and connecting us with other states that had done similar assessments.”

“Activities in the grant related to the program improvement goal.”

“The coaching helped in that we were able to work through an evolving project definition as the contracting process was taking shape, allowing for real time discuss and problem solving as the project evolved.”

“Just learning about things I didn’t know I didn’t know.”
Model Practices Observed

• Positive rapport with participants at the sites.

• Interactive engagement and high energy throughout the sessions.

• One coach leveraged evidence-informed visual QI tools (e.g. QI software, prioritization matrices, fishbone diagrams).

• Actionable next steps offered at the end of the session.
Model Practices Observed

• Offers to send articles after the session.
• Celebrating short-term successes.
• Reflexive learning and effective question probing.
• Organic discussion and integrated QI concepts reflected.
Note: Totals represent a summary of the coaching experience from March 2019 through December 2019. At least one coach ended sessions in October; at least one coach began sessions in April. Hours include preparation, scheduling, contract and administrative, and coaching sessions. Connections are defined as the number of instances of coaching that took place across all communication forms. Video/web connection percentage represents the percentage of all 377 connections made. 36% of connections made were e-mail, and 6% were by phone, 3% indicated as Other.
Learning Exchange

Cohort 1 - Event Evaluation Findings
Learning Exchange – Participants

Types of Participants (n=38)

- Site Participant: 84%
- Coach: 11%
- CDC/NNPHI/RMPHTC Staff: 3%
- Other: 3%
Types of Organizations (n=38)

- State/Territory Health Department: 84%
- Local Health Department: 11%
- Federal government: 3%
- Academia: 3%
- Nonprofit: 0%
- Independent Consultant: 3%
- Other: 0%
Readiness to Apply What Was Learned (n=37)

- 41% I can perform now at an expert level in using what I learned.
- 14% I can be successful now in using what I learned.
- 3% I need more experience to be good at using what I learned.
- 43% I need more guidance before I know how to use what I learned.
I was able to both share and learn from peers.
Most of my interactions were focused on sharing lessons I learned with others.
Most of my interactions were focused on learning from peers during the event.
Cohort 1 Learning Exchange Outcomes

- Participants felt they could be successful now in using what was learned from the event.

- Participants agreed they could both share and learn from peers.

- Participants were satisfied with the event overall (95% strongly agree/agree).

- Participants felt the LE was a worthwhile investment of their time (95% strongly agree/agree).

- The information was presented in ways the participants could clearly understand (97% strongly agree/agree).
87% of participants feel “My understanding of quality improvement has improved as a result of me attending this event.”

98% of participants would recommend the LE to a colleague.

95% strongly agree/agree that “I engaged in networking and made contacts I will connect with in the future.”

97% strongly agree/agree that “The event helped me to connect with my coach/site.”
Knowledge and Skills

Comparative Outcomes
Pre- to Post-Survey Participant Growth
Note: All measures showed great improvement and are successful. Color codes serve to parse differences, not deficiencies.

<table>
<thead>
<tr>
<th>Knowledge in Key Areas (Expert/Advanced)</th>
<th>Pre-Survey</th>
<th>Post-Survey</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change management</td>
<td>28%</td>
<td>58%</td>
<td>30%</td>
</tr>
<tr>
<td>Evidence-informed program planning skills</td>
<td>24%</td>
<td>67%</td>
<td>33%</td>
</tr>
<tr>
<td>Analytical/assessment skills</td>
<td>29%</td>
<td>84%</td>
<td>56%</td>
</tr>
<tr>
<td>Program improvement</td>
<td>16%</td>
<td>75%</td>
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<table>
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</tbody>
</table>
Challenge Areas

• Knowledge
  • Change Management
  • Evidence-informed program planning skills

• Skills
  • Change Management
  • Program Improvement
Strengths
Participant Capacity Trends

• Participants were clear on their areas of personal strength and personal improvement needed from the beginning.

• Participants indicated a need for more experience in applying what they know.

• They largely indicated an intermediate knowledge of the core areas/skills, yet indicated high confidence in performing them.
Coaching Delivery

• Participants primarily reported 1 - 5 years of experience – may inform the content of coaching sessions to prioritize early career needs.
Cohort 1 Learning Exchange

• Opportunity to consider quality improvement learning outcomes, objectives, facilitation, and content approaches.

• Team can consider whether or not the learning exchange is open to those who did not participate in the coaching program.
Recommendations

Moving Forward
Participant Capacity Recommendations

- RMPHTC guide coaches to provide more instruction in session tailored for beginners or other career-level defined as most prevalent in the pre-survey.
- Coaches provide additional emphasis on data analysis and how to include that into the project improvement plan and QI storyboards to present a data-driven approach.
Coaching Delivery Recommendations

• RMPHTC convey this strategic perspective to coaches: Coaches help sites determine how their proposed solutions can be expanded into lessons that not only address their current scenario but also offer a sustainability approach to considering standard/evidence-informed guidelines for application in future cases at their site.

• RMPHTC determine whether or not the coaching sessions would benefit from a structural template developed by NNPHI/RMPHTC containing guiding slides for session priorities, case discussion, open discussion, key takeaways, assignments and next steps, while balancing what seems to be a beneficial, organic coaching discussion.
Coaching Delivery Recommendations

• Coaches should consider more explicit references to evidence-informed program improvement strategies and QI tools.
  • List of QI tools leveraged per session, for example.

• RMPHTC/Coaches determine whether or not it is beneficial to receive site challenges and questions ahead of time to support preparation.
  • List of learning outcomes per coaching experience or list of learning objectives per session (can be included in Agendas)
Coaching Coordination Recommendations

• RMPHTC include real-time, on-screen evaluation of coaching learning sessions for higher response rate.

• NNPHI/RMPHTC host pre-session/kickoff content on identifying what capabilities coaches can offer their sites. Integrate PDSA storyboards into the discussion.

• NNPHI/RMPHTC review pre-survey contents to convey priorities to coaches and offer clarity on what success looks like.

• Coaches support site completion of PDSA storyboards for defined QI project.
Coaching Coordination Recommendations

- CDC/NNPHI/RMPHTC define threshold or circumstances where coaches can flag for TA needs from NNPHI/RMPHTC.

- CDC/NNPHI consider select in-person site visits for the next cohort.

- CDC consider an opportunity for coach-led engagement beyond the monthly calls – e.g., online community, designated coaches Q&A e-mail, or group electronic communication.
Administration Recommendations

• RMPHTC share touchpoint call notes with NNPHI within 48 hours to support formative evaluation and real-time improvements in the coaching experience.

• RMPHTC lead initial session with coaches to review the pre-survey categories as a guide for coaching expectations so coaches are clear on their charter and priorities.

• CDC/NNPHI/RMPHTC align learning exchange sessions with success priorities, skills, and capabilities identified in pre/post surveys.
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THANK YOU