# Missouri Home Visiting CQI Handbook

Continuous Quality Improvement Process for DHSS Maternal and Child Health Home Visiting



Missouri Department of Health and Senior Services Revised June 2020



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The Continuous Quality Improvement (CQI) process for Missouri's Home Visiting program was adapted from the Missouri Department of Social Services' three-tiered CQI model.

#### **CONTINUOUS QUALITY IMPROVEMENT PROCESS**

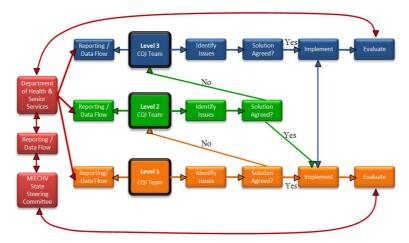
The Missouri Department of Health and Senior Services (DHSS) Home Visiting Program's continuous quality improvement (CQI) is a process that involves multiple levels in the ongoing assessment of the effectiveness of services provided to participants in the Maternal, Infant, and Early Childhood Home Visiting (MIECHV) and Title V Maternal Child Health Services Block Grant (MCH) home visiting programs administered by DHSS. DHSS home visiting CQI is a three-tiered process. Level 1 is "local" and allows local implementing agency (LIA) home visiting staff along with one or more family participant members to conduct ongoing assessment of the LIA's program procedures, processes, goals, and outcomes. Level 1 meets quarterly during the first month of each quarter. Level 2 is "inter-agency" and provides a platform at which Level 1 team representatives from all LIAs meet to interact and support each other in the second month of the quarter. Level 3 is the "state" level quarterly meeting held during the third month of each quarter. It is comprised of DHSS Home Visiting Program staff, other state level stakeholders, and Level 2 team members representing each of the four early childhood evidence-based home visiting models implemented under MIECHV and MCH funding. Level 3 is the final tier to address unresolved issues and provides oversight to the process.

Principles of the DHSS home visiting CQI process include:

- Participation of all invested home visiting staff from local through the state levels;
- Allocation of resources and staff time at the state and local levels supported by management as illustrated by funding that supports staff time and other associated costs;
- Local level engagement fostering an environment of reflective practice;
- Examination of site specific LIA activities and performance data to create specific, measurable, attainable, relevant, and timely (SMART) aims to guide improvement;
- Development of CQI projects that utilize plan, do, study, act (PDSA) cycles to test changes for improvement of procedures, policies, and processes;
- Ongoing assessment of local level data collection in the DHSS web-based data system for expectations of quality and achievement of performance measures and outcomes;
- Parity of importance between all levels of CQI meetings and team members;
- Resolution of the majority of issues at the level first identified; and
- A continuous feedback loop that ensures continuity of the process.

The following graphic is a visual representation of the continuous feedback of information:

**Figure 1: CQI Information Flow** 



#### **CQI TEAMS**

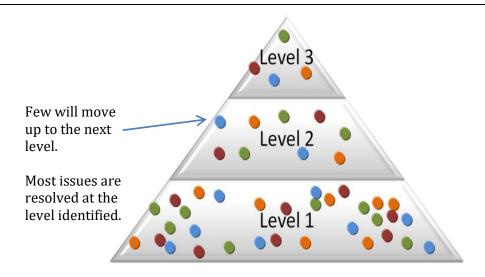
CQI teams focus on the identification of needs, goals, and available resources, as well as the strengths of the program, the staff, and the participants. Areas needing improvement are identified and discussed, and action plans are developed, resulting in solutions for identified needs to improve service delivery that in turn improves overall statewide performance measures.

The success of all levels of the CQI process is dependent upon the inclusion of participants who are knowledgeable, skilled, and invested. Teams are made up of a variety of individuals that include local and state level home visiting staff, state level stakeholders, family participants, and community members. In order for the CQI process to truly reflect a complete picture of the home visiting service delivery system, family participant members and community partners must be a part of the process. Family participant(s), either current or former program participants, are required members for each Level 1 team. The unique perspective family participant members bring to the process cannot be obtained through any other means. They are essential to improving the service delivery system each LIA has in place. Community partner participation is encouraged at all levels to help develop solutions to issues in the community that teams cannot address without the support and resources of their communities. The three-tiered process of forwarding unresolved issues to the next level offers the ability to share with stakeholders of varied expertise and resources, fostering new and innovative ideas and solutions that could not come from a single-tier approach.

CQI teams develop and implement solutions for the majority of all issues identified at that level. Issues from Level 1 teams that are not resolved utilizing local resources are shared at the inter-agency Level 2 meeting for additional insight to possible resolutions. At this level, LIAs are able to support each other through shared experiences and common goals. The Level 2 team in turn reports to and seeks input from the state Level 3 team. Through this three-tiered process, needs are identified by those most directly affected, while solutions may require the input of all levels.

The following graphic represents how issues are resolved through the three levels of the DHSS home visiting CQI process:

**Figure 2: CQI Issue Resolution** 



#### MISSOURI HOME VISITING GATEWAY CQI WEBSITE

The DHSS Home Visiting Program, through a contract with the University of Missouri, developed the Missouri Home Visiting Gateway CQI website to support CQI efforts, especially at Level 1 of the three-tiered process. The website is a centralized toolbox of resources for Level 1 CQI teams to learn about, implement, and share CQI efforts and best practices. The website is publicly accessible at <a href="https://www.health.mo.gov/living/families/hvcqigateway/">www.health.mo.gov/living/families/hvcqigateway/</a>. The Gateway CQI website provides detailed guidance of the PDSA cycle process and links to a variety of resource materials including webinars, articles, and toolboxes on topics relevant to home visiting such as safe sleep, breastfeeding, intimate partner violence, child development, and others. It allows Level 1 team members access to secure sections for member contact information, minutes, and agendas of past meetings, submission of current CQI projects through the CQI project tracker, and submission of completed CQI storyboards that detail projects and the outcomes of those projects that others can reference and use to shape their own CQI projects and PDSA cycles.

Level 1 CQI teams are provided site level performance measure and outcome reports as well as monthly data quality reports for Level 1 CQI teams to develop CQI projects that are guided by SMART Aims and utilize PDSA cycles to address identified program or data issues.

The graphic below represents the CQI Project Process and PDSA cycle steps:

Figure 3: CQI Project Process



Completed CQI Projects including PDSA test cycles recorded in storyboard format are submitted to the DHSS Home Visiting Program to be posted on the Missouri Home Visiting CQI Gateway webpage to be viewed and used as opportunities for learning about continuous quality improvement processes across all DHSS home visiting programs. The Gateway CQI webpage has sample templates of a PDSA Planning Form (CQI project planning tool) and a CQI Project Storyboard for Level 1 teams to utilize.

#### **CQI NEWSLETTER, QUALITY OUTLOOK**

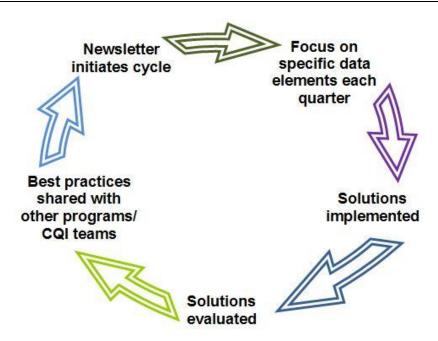
To further support and focus the CQI process, the DHSS Home Visiting Program issues the quarterly CQI newsletter, *Quality Outlook*, during the first two weeks of each quarter. The newsletter contains articles and action alerts that focus on specific performance measures, data elements, and processes relevant to all LIAs. Aggregate data drives the statewide focus on performance measures and outcomes highlighted in the newsletter.

The CQI quarterly newsletter provides guidance for CQI teams and is required to be reviewed during Level 1 and Level 2 meetings; however, teams are not limited to discussing newsletter items only. <u>Any</u> service delivery issue is appropriate for discussion during CQI meetings. Ongoing elements of the newsletter may include:

- Performance measures and outcomes review
- Action Alerts to guide improvement opportunities
- o CQI calendar for the quarter
- o Pertinent state and national awareness event information
- o CQI successes and celebrations
- o CQI meeting minutes submission link
- o Summary of previous quarter's Level 3 meeting

The following CQI process flowchart illustrates how the CQI newsletter focuses the CQI process:

Figure 4: CQI Process Flowchart



With input from all invested stakeholders involved in quarterly team meetings, Missouri's three-tiered CQI process provides a forum from which the DHSS Missouri Home Visiting Program as a whole continuously improves.

#### Figure 5: Missouri Home Visiting CQI Process Organizational Overview

#### **CQI Process Organizational Overview**

Level 1 local meetings involve local implementing agency (LIA) staff and one or more family participants to assess policies, procedures, and activities related to individual LIA's delivery of home visiting services.

Level 2 inter-agency meeting obtains broader perspectives for solutions to issues that cannot be resolved locally.

Level 3 state meeting involves the DHSS Home Visiting Program staff, Level 2 Team members, Early Childhood Coordinating System (ECCS) representation, and other home visiting stakeholders.

#### LEVEL 3 (State)

Home Visiting Program Staff: Project Director Program Coordinator Program Managers Office Support Assistant Epidemiology Staff Level 2 Team members ECCS Representative(s) Other Stakeholders

**DHSS Home Visiting Program Staff** Level 2 Team Leader Level 2 Representatives of each model **ECCS Steering Committee Representative(s)** 

#### LEVEL 2 (Inter-Agency)

Two Level 1 Team members from every LIA

**Community Partners** as applicable

Level 1 Team Leaders from each LIA

Level 1 Team Representatives from each LIA

#### LEVEL 1 (Local)

Local Implementing Agency Home Visiting Program Staff

One or more current or former Home Visiting Program **Family Participants** 

Community Partners as applicable

#### **MIECHV LIAs**

Unresolved issues move to the next level

- +Delta Area
- +Malden R-1 School District
- +PAT National Center
- +South Central
- +Southeast Hospital

#### **BUILDING BLOCKS** LIAs

### •Kansas City Health

- +St. Louis County Department of Public Health
- +Southeast Hospital

#### **HFMoHV LIAs**

- +Great Circle
- +Phelps/Maries County Health
- Randolph County Health Department.

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#### **CQI TEAM ROLES**

Each team at every level must have two representatives to fill the roles of Leader and Scribe. At Level 3, the Leader role is filled through rotation among the Home Visiting Program's core staff of Program Managers and the Program Coordinator, with scribe duties assigned to the program office support assistant. At Levels 1 and 2, individuals must be selected annually during the Fourth Quarter meeting to fill these two roles from within each team. At the beginning of the first quarter of the new fiscal year, the current Leader and Scribe should assist the new Leader and Scribe in taking over the duties of their role.

#### Leader Role

The Leader's role is to reinforce the work of the team and to represent the team at the next level of CQI. If the Leader cannot attend the next level meeting, a substitute must be designated.

#### **DUTIES:**

- Prepare the meeting agenda with the Scribe.
- Facilitate the meeting to address each topic of the agenda and stay within time parameters.
- Support and reinforce the team for productivity and idea generation.
- Ensure that issues are well understood to facilitate productive discussion, resolution, and PDSA cycle tests.
- Summarize the action plan or next steps agreed upon by the team, including items to be tabled until more information or resources can be sought at the level the issue was raised.
- Recap issues the team has agreed to move to the next level for broader input on resolution.
- Assist team members with their portions of the action plan or next steps following the meeting, as needed.
- Assure all team members are notified of when the next quarterly meeting is scheduled including date, time, location, agenda, and if applicable, conference call-in number and webinar information.

#### Scribe Role

The Scribe participates in the discussion of the meeting and focuses on recording meeting minutes. If the Scribe cannot attend a meeting, a substitute must be designated to record the minutes.

#### **DUTIES:**

- Prepare the meeting agenda with the Leader.
- Maintain a current listing of team members (titles, agency, email, phone number, and address).
- Take minutes to capture attendance, discussion, and action plan/next steps.
- Review minutes with the Leader for accuracy following the meeting.
- Email the CQI Meeting Agenda-Minutes to <a href="https://example.com/HVCQI@health.mo.gov">HVCQI@health.mo.gov</a> and to the next level team scribe identified in each quarter's Missouri Home Visiting *Quality Outlook* CQI Newsletter.
- Copy or email materials that team members need for each meeting.

#### **CONFIDENTIALITY**

Teams are made up of a variety of individuals; most are employees of LIAs or DHSS and others who are important contributors to the process, but not directly employed by either an LIA or DHSS. LIA and DHSS staff are bound by confidentiality agreements as a condition of their employment. The Level 1 teams specifically recruit and foster family participants to serve as ongoing consistent team members. To assure that individuals serving as family participants and the Level 1 LIA staff are able to work effectively together, family participants must sign a confidentiality agreement developed by the LIA to bind the agency and the participant to non-disclosure of all protected information they deem necessary.

Teams at all levels may have additional members of the community in attendance. To protect the confidentiality of staff and home visiting participants, all team members should be circumspect in avoiding the use of personally identifiable information (PII) about individuals served through the home visiting programs during the course of meetings. Information related to incidents, accidents, and grievances should be discussed in a manner that protects the confidentiality of all involved. A sign-in sheet with a confidentiality statement is required to be used at Levels 1 and 2 for community members and others not already bound by confidentiality agreements. A sample sign-in sheet with a confidentiality agreement is included in the appendices of this handbook (Appendix 1). Levels 1 and 2 sign-in sheets are to be submitted to the DHSS Home Visiting Program at HVCQI@health.mo.gov.

The Level 3 team meeting is a publicly accessible meeting. As members of the public may be present, the team must exert special care to assure that issues are discussed in a manner in which no PII regarding individuals served by the contracted LIAs is referenced. It is incumbent upon all members to be circumspect and deliberate in their speech to avoid any breach of PII or confidentiality.

#### **CQI TEAM PARTICIPANTS**

#### Level 1 (Local) Participants

The Level 1 CQI team is local and comprised of LIA home visiting staff and one or more current or former home visiting family participants. All LIA staff involved in home visiting may participate in Level 1, including home visitors, supervisor, program administrator, and support staff, but at minimum must include all home visitors, the supervisor and a family participant.

Family participants can be current or formerly enrolled home visiting family participants, whose role is vital to providing the perspective of those served by the program and ensures that Level 1 teams fully represent essential decision makers. Family Participants are primary caregivers of children involved with the home visiting program of each LIA either currently or in the past. Family Participants should be recruited based on their inherent skills in problem solving, decision making, leadership, and interest in helping themselves and others. It is beneficial for the Family Participant to have a basic knowledge of the home visiting model implemented by the LIA, the ability to participate in person at each quarterly meeting, and the expressed desire to volunteer as a member of the Level 1 team. To assist Family Participants to become active and effective members of the

team, an LIA staff member must provide guidance and coaching of family participants in understanding their role in the CQI Level 1 team. It is a goal of family participation that family participants, who are fully integrated into the Level 1 team, may be selected within their team to serve in either of the required roles of Leader or Scribe for their Level 1 team and further to represent their Level 1 team in subsequent levels.

Community partners and other stakeholders are encouraged to be called upon to participate in Level 1 team meetings as needs are identified to provide direction and support from the local community.

#### • Level 1 Team Participants include:

- Home Visiting Supervisor
- Home Visitors
- Family Participant(s)
- Administrator (optional)
- Data Entry and/or Support Staff (optional)
- Community partners and other stakeholders (optional)

Two members from each Level 1 team will participate in the Level 2 team meeting during the second month of each quarter. These two members will include the Level 1 Team Leader and one representative. The representative can be any member of the Level 1 team, including family participants as described earlier.

#### Level 2 (Inter-Agency) Participants

Level 2 CQI brings members from every local LIA Level 1 team together for the opportunity to meet and interact with their home visiting contemporaries across a variety of agency sizes and geographic areas as well as across the four evidence-based models implemented through the LIAs. The shared knowledge and skills of the inter-agency Level 2 team allows for greater input and support by those with a shared investment in the continuous quality improvement of the overall DHSS Home Visiting Program.

The Level 2 CQI team includes Level 1 team members from the eleven contracted DHSS home visiting LIAs. Each LIA has two members from their Level 1 team on the Level 2 team, the Level 1 Team Leader and one representative. As at Level 1, the Level 2 team must have a Team Leader and a Scribe to carry out the duties of those roles.

Community partners and other stakeholders may be included in Level 2 meetings, as needed, to provide input on specific issues.

#### • Level 2 Team Participants include:

- Level 1 Team Leader from each LIA
- Level 1 Team Representative from each LIA
- Community partners and other stakeholders (optional)

Four members from the Level 2 team will participate in the Level 3 team meeting during the third month of each quarter. These four members will include the Level 2 Team Leader and three representatives. One representative must be selected from each of the three evidence-based home

visiting models the Leader does not represent in order to ensure representation from all four models. The Level 2 Leader has the responsibility to report out on the Level 2 meeting. The Leader, with the three selected model representatives, ensures the perspectives of the four home visiting models implemented through DHSS support are conveyed and considered.

#### **Level 3 (State) Participants**

The Level 3 team meeting is a State of Missouri DHSS publicly accessible meeting. Required members at the Level 3 team meeting include all DHSS Home Visiting Programmatic and Epidemiological staff, Early Childhood Coordinating System (ECCS) State Steering Committee representation, the Level 2 Team Leader, and three Level 2 model representatives.

Community partners, the public, and other stakeholders may join and contribute to Level 3 meetings to provide input on issues and are optional attendees.

#### • Level 3 Team Participants include:

- Home Visiting Program Team
  - Project Director
  - Program Coordinator
  - Program Managers
  - Program Office Support Assistant
  - Epidemiology Staff
- Level 2 Team Leader and three Level 2 model representatives
- ECCS State Steering Committee Representative(s)
- Community partners and other home visiting stakeholders (optional)

#### **MEETINGS**

Meetings at Level 1 are held in person as separate dedicated CQI meetings or in conjunction with other LIA scheduled meetings. The Level 2 meeting is held via conference call arranged through the DHSS CQI Lead. The Level 3 meeting is held at the DHSS complex and is accessible by in-person attendance, web connection, and phone conferencing.

#### **Time Frames**

A key component in the process is the structured meeting period. The DHSS three-tiered process requires quarterly team meetings held sequentially over each three month federal fiscal year quarter, with Level 1, Level 2, and Level 3 meetings held respectively in the first, second, and third month of each quarter. Meetings at each level will be held during the time frames outlined in the CQI calendars available as appendices in this handbook (Appendix 2.A and 2.B).

#### **Agendas**

At every level, CQI teams will develop and employ an agenda. See the sample CQI Meeting Agenda-Minutes included in the appendices of this handbook (Appendix 3).

Each level CQI team meeting requires an agenda to be set in advance. This assures meetings are productive and task oriented. At all levels the agenda is set and prioritized by the individuals filling the roles of Team Leader and Team Scribe who seek input from other team members as needed.

The agenda items listed below should be addressed by each level, but is not a comprehensive list that can be considered by each team:

#### • Level 1 Team agenda items:

- Previous meeting minutes. (required)
- Missouri Home Visiting Quality Outlook CQI Newsletter Action Alerts. (required)
- PDSA plan development/review. (required)
- Quality improvement topics, e.g., staff retention/satisfaction, participant attrition, safety, hiring, data entry, model fidelity, etc.
- LIA level monthly data quality reports.
- Other topics as identified.

#### • Level 2 Team agenda items:

- Previous Level 2 meeting minutes. (required)
- Level 1 meeting summaries shared by each Level 1 Leader. (required)
- Each LIA's PDSA activities/progress. (required)
- Missouri Home Visiting *Quality Outlook* CQI Newsletter Action Alerts. (required)
- Topics as requested by DHSS. (required)
- Unresolved issues moved up from Level 1 teams. (required)
- Annual performance measures and outcomes data report. (when available)
- Model fidelity.
- Other topics as identified.

#### • Level 3 Team agenda items:

- Previous Level 3 meeting minutes. (required)
- Level 2 meeting summary shared by the Level 2 Leader. (required)
- Unresolved issues moved up from Levels 1 and 2. (required)
- Topic of relevance.
- Annual performance measures and outcomes data report. (when available)
- Model fidelity.
- Shared successes and resolved issues.
- Other topics as identified.

#### **Minutes**

At every level, CQI teams will record minutes of the meeting to capture attendance, discussion, and action plan/next steps. See the sample CQI Meeting Agenda-Minutes included in the appendices of this handbook (Appendix 3). Finalized CQI Meeting Agenda-Minutes from Levels 1 and 2 are to be submitted to the DHSS Home Visiting Program at <a href="https://dww.hvc.up.new.new.hvc.up.new.

#### APPENDIX 1: CONFIDENTIALITY STATEMENT/SIGN-IN SHEET (SAMPLE)

# Home Visiting Continuous Quality Improvement (CQI) Team Meeting Location Date

#### **CONFIDENTIALITY STATEMENT:**

In becoming a participant on one of the Continuous Quality Improvement teams, I hereby agree to hold all information obtained in the course of this and future meetings in the strictest of confidence.

My signature implies that I respect the privacy of the participants in the DHSS Home Visiting program, the Missouri Department of Health and Senior Services, the DHSS Home Visiting program personnel, community partners, and stakeholders, and will not disclose any information regarding children or families discussed in the meetings.

Signature below constitutes understanding of the above information.

NAME and Position (Please Print)*	Agency	Email Address	Signature

#### APPENDIX 2.A: 2019-2020 CQI CYCLE CALENDAR

#### 2019-2020 CQI Cycle Calendar 1st Quarter--Level 3 1st Quarter--Level 1 1st Quarter--Level 2 Sun Mon Tues Sun Mon Tues Wed Thur Sun Mon Tues Wed Thur Fri Wed Thur Fri Sat Fri Sat 2nd Quarter--Level 3 2nd Quarter--Level 1 2nd Quarter--Level 2 Tues Wed Thur Wed Thur Fri Sat Mon Tues Wed Thur Fri Sat Sun Mon Sun Mon Tues 3rd Quarter--Level 3 3rd Quarter--Level 1 3rd Quarter--Level 2 Mon Tues Wed Thur Fri Sat Mon Tues Wed Thur Fri Sat Sun Mon Wed Thur Fri Sat 4th Quarter--Level 3 4th Quarter--Level 1 4th Quarter--Level 2 Sun Mon Tues Wed Thur Fri Sat Mon Tues Wed Thur Fri Sat

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#### APPENDIX 2.B: 2020-2021 CQI CYCLE CALENDAR

#### 2020-2021 CQI Cycle Calendar 1st Quarter--Level 2 1st Quarter--Level 3 1st Quarter--Level 1 Mon Tues Wed Thur Fri Sat Sun Mon Tues Wed Thur Fri Sun Mon Tues Wed Thur Fri Sat Sun 2nd Quarter--Level 3 2nd Quarter--Level 1 2nd Quarter--Level 2 Sun Mon Tues Wed Mon Tues Wed Thur Tues Wed Thur Fri Sat Fri Sat 3rd Quarter--Level 3 3rd Quarter--Level 1 3rd Quarter--Level 2 Wed Wed Mon Tues Thur Fri Sat Mon Tues Thur Fri Sat Mon Wed Sun Sun Tues Thur 4th Quarter--Level 3 4th Quarter--Level 1 4th Quarter--Level 2 Mon Tues Wed Thur Tues Wed Thur Fri Wed Thur Sat Fri Sat Sun Mon Fri Sun Mon Tues Sun

## Appendix 3: CQI Meeting Agenda-Minutes (Sample)

Home Visiting Continuous Quality Improvement Agenda - Minutes									
			M	eeting	g Info	rmation			
	Level								
Agency/Lev									
D	Quarter ate/Time								
	Me Call #								
	nar Link								
	Location						 _	T _	
Participants							Present	Present other	Absent
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Role

Home Visiting Continuous Quality Improvement Agenda - Minutes						
Agenda Topic	Activity	Discussion Minutes				
Welcome /Introductions						
Review/Approval of previous quarter minutes						
neview/approvar or pre	vious quarter immutes					
Summary of prior Level Meetings (applicable to Levels 2 and 3)						
Old Beeds and						
Old Business						
New Business						
Issues to Next Level						
Additional items						
Action Plan/Next Steps						
Action I fail/Next Steps						
Confirm next meeting						