

# Learning While Doing in the Human Services Sector: Becoming a Learning Organization through Organizational Change



Casey Family Services, the direct service agency of the Annie E. Casey Foundation, is a multi-service child welfare agency that historically delivered high-quality, long-term foster care for children and youth with complex special needs who were deemed unlikely to find families through reunification or adoption. This is its story of change.



## **Introduction**

Organizational change is an organization's movement from its current status to a future and, hopefully, more effective status (Pierce, Gardner, & Dunham, 2002). In the nonprofit sector, significant organizational change may occur when an agency changes its overall strategy for providing services, or begins or ends a major practice or program. The forces driving organizational change may be internal, external, or both. The ability to manage organizational change and to achieve, as much as possible, the ideal of a learning organization is critical to success. To succeed, organizations need a clearly defined and well-managed process to implement change and continuously apply new learning. Otherwise, they are likely to encounter difficulties and may incur substantial human and financial costs.

Casey Family Services, the direct service agency of the Annie E. Casey Foundation, is a multiservice child welfare agency that historically delivered high-quality, long-term foster care for children and youth with complex special needs who were deemed unlikely to find families through reunification or adoption. Casey recruited a cadre of reliable foster families, many of whom parented children and youth from foster care until and often after age 18. As the Casey Foundation and agency managers shifted their aim to seek more permanent outcomes for children, they recognized that frontline practice had to change. In 2004, Casey Family Services, building on its experience, transformed its practice approach to focus on securing permanent, loving families for children and youth and a timely exit from foster care.

Casey Family Services called this organizational change the Move to Greater Permanence (MGP). Assessed along a diverse set of criteria, preliminary results are encouraging (Casey Family Services, 2010; Greenblatt, Kerman, Frey, & Freundlich, 2010). The median length of stay for youth in foster care has declined from 5.5 years to 2.6 years. The proportion of youths exiting foster care within their first 18 months has increased to 56 percent, up from 23 percent before implementing the MGP. Similarly, the percentage of youths exiting to reunification, adoption, or guardianship within 18 months increased from 10 percent to 45 percent of recent entry cohorts. The agency also has demonstrated efficiency in service provision and revenue generation. After a moderate increase in staff turnover (14 percent), staff retention has returned to base levels (an average 4.9 percent annually).

Achieving these outcomes required careful planning and implementation. From the outset, Casey Family Services viewed the MGP change initiative as an opportunity to model the qualities and best practices of a learning organization. Purposeful and data-driven change management in the context of a strong incentive to act creates a perfect scenario for learning while doing. While establishing the new practice's framework, a continuous and inclusive evaluation process was essential to promote change, refine supports, improve outcomes, and articulate lessons learned.

This summary describes the origins, processes, and outcomes of the learning-while-doing approach and presents lessons learned that other child welfare providers and human service organizations may apply as they engage in organizational change.

## A Framework for Organizational Learning and Managing Organizational Change

A framework for understanding organizational change through learning considers first- and second-order change (Watzlawick, Weakland, & Fisch, 1974). First-order change, or incremental learning, leaves intact the underlying organizational system, values, and purpose while changing only part of the system, such as staffing or the type of program offered (Perkins, et al., 2007). Second-order change is a radical, transformative, or revolutionary shift that occurs in the system (Perkins, et al., 2007).

Some have argued that organizations need to engage in both incremental and transformative learning to succeed (Miner & Mezias, 1996). Indeed, organizational implementation drivers, such as performance monitoring, spur a variety of incremental and transformative adjustments (Fixsen, Naoom, Blasé et al, 2005). Facing uncertainty, a child welfare agency may use incremental learning to test small changes that can ultimately serve as the basis for transformative learning.

## The Casey Family Services Model of Organizational Learning

The learning-while-doing model used by Casey Family Services blends first-order and second-order learning. Like many organizations, Casey found that incremental changes played an important role in the early stages of implementing new practices. For example, agency leaders initially conducted regional meetings to communicate the MGP vision, but staff feedback suggested there was some confusion about the reason for the change and how the agency was defining new roles and responsibilities. In response, agency leadership honed its messages and provided specific information about expectations.

Casey Family Services learned to pay close attention to the role of all staff members in the change process, and to aspects of the organizational culture that served to facilitate or hinder change. The organization provides strategic leadership for learning at all levels and works to connect to the larger child welfare environment that includes federal and state policy. The agency also encourages collaboration and team learning and places a priority on creating systems to capture and share learning.

To promote ongoing learning and manage expenses, Casey

Family Services uses continuous quality improvement (CQI) to monitor, understand, and improve on all aspects of service delivery and case documentation (Baker & Charvat, 2008; King, McKelvey-Walsh, Freundlich, & Brenner, in press; Wulczyn, 2007). Casey has incorporated its work in benchmarking (Heery & Noon, 2001) and data-driven dash-boarding processes (Bickman, 2009; Sundet & Kelly, 2007) into its learning-while-doing model. It has built on its culture of reflective practice, in which practitioners use professional judgment to develop and implement services for children and families (Thompson, 2009).

## Learning While Doing: The Move to Greater Permanence

The MGP change process involved new practices, policies, and procedures to focus the organization on legal permanence and family connections for youth in foster care and to strengthen the agency as a learning organization. Casey Family Services' delineated learning path addressed critical functions and organizational features in two main areas: strategic planning (see Table 1, page 8) and internal agency assets (see Table 2, page 9). First, Casey designed a support plan at the beginning of the change process. Early challenges and feedback helped identify barriers to implementation. Then, the agency initiated a remediation response driven by first-order changes to narrow the gap between expectations and experience. Finally, reassessment revealed progress and remaining challenges, as well as emergent problems in need of remediation or second-order changes to the underlying assumptions and vision.

An implementation evaluation documented the changes to agency infrastructure, supports, training, and culture; it noted the timing of these changes, why they occurred, and whether they addressed challenges. Data collected over three years from leaders, direct care staff, and coach consultants documented not only the agency's path of change, but its growth as a learning organization.

Leadership sought to convey a clear vision, communicating with staff members from the start. In 2004, an internal committee developed a plan to prepare the agency for change and to determine how the agency's central administrative office would support the eight service divisions. The executive director shared the new vision and direction with staff at regional and agency-wide meetings. Staff members were

encouraged to offer their comments and concerns following these meetings.

The practice changes were challenging for many long-term staff who had filled the role of surrogate parent, helping to shape and develop youth through their pre-teen and teen years. The transition from surrogate parent to family finder and facilitator was a difficult one. Incremental, first-order changes involved firm messages from management about the certainty of the change, as well as efforts to enhance knowledge and increase support from supervisors and coach consultants. However, different perceptions of the magnitude and meaning of the change persisted. Although some differences remain, second-order transformative learning has begun. Satisfaction ratings on most components of implementation are higher for administration than for division management, although the gap is narrowing. Additional examples include agency efforts to foster greater peer-to-peer and cross-division learning, in which expression of doubts and questions are welcome.

Strategic planning activities included adjusting the balance between division flexibility and standardized agency practice as well as addressing persistent concerns about the time and paperwork demands of the new practice approach. Objective caregiver recruitment and retention data drew attention to the changing relationships with foster parents and the impact on staff. For instance, foster parents who adopted or took guardianship often shortened their tenure with the agency, prompting staff to increase their recruitment efforts.

Bolstering the agency's internal supports – staffing, coaching,

supervision, training and tools, and data-driven continuous quality improvement – helped facilitate practice change. Teams from Casey's central administrative office met with division management and staff to outline differences between the existing and new practice models. Staff then participated in a two-day permanency teaming skills training ("Families for Life") that included youth who had been involved in their own permanency planning. Each division was assigned a "permanency coach" who worked with selected staff to model permanency teaming and to help supervisors and social workers develop team facilitation skills. This training and coaching continued over an 18-month period.

Casey also developed an implementation evaluation designed to explore how the learning-while-doing approach was affecting practice, what key stakeholders thought of the change, and how to better describe the emerging practice model. The evaluation provided ongoing feedback to inform mid-course corrections. This evaluation relied on multiple informants, such as leadership at the service divisions and administration, social workers and other service providers, coaches, and team participants. It used objective data sources, such as documentation of training and routine assessment of youth exiting the agency.

Second-order change also occurred. When management received unsettling feedback about differences in satisfaction between administration and division leaders, it initiated a process of self scrutiny to narrow the gap in perceptions. Areas and methods of assessment, described in Greenblatt et al., 2009, have included staff training, supervision and coaching, type and quality of services provided, and model implementation and fidelity.



Learning while doing provided the agency with ample opportunities for candid conversation concerning the staff and organizational behavior needed to support a learning organization. Second-order changes resulting from the MGP include an environment of increased openness that, in turn, has helped the agency become more of a learning organization.

## Recommendations for Developing and Strengthening a Learning Organization

MGP implementation evaluation data collected over five years has contributed to the following 12 strategies that helped Casey Family Services become more of a learning organization and that may benefit other agencies undergoing organizational change.

### 1. Learning while doing is difficult, but rewarding.

Learning while doing can feel like learning the hard way. Yet, when executed well, clients can benefit from new services, and innovation can reach the field more rapidly. At the same time, organizations should monitor results closely for unforeseen consequences, as change can sometimes lead to worse outcomes. This work requires active reflection and creative problem-solving to fill gaps in knowledge, skills, policies, and procedures.

Recommendations:

- Prior to implementation, examine the benefits, as well as costs to staff and the organization, of a learn-while-doing approach.
- Consider using pilot programs to prepare for organizational change.

### 2. Clarify definitions and perceptions of change from the start.

Define desired outcomes before starting to change. Leaders should establish procedures for implementing change and encourage staff to work together to reach target outcomes.

Recommendations:

- Set a course and revise as needed. Balance the risks of over-defining the change processes and leaving too much room for uncertainty, which can undermine consensus and splinter coordinated change.
- Provide frequent progress reports.
- Establish measurable, public timelines; revisit them to monitor progress and refine support plans.

### 3. Understand your starting point and honor past traditions.

Change can reflect a clear break from the past, but it often builds on practices, values, or routines already in place. Defining change requires a clear, measurable understanding of the starting point and the rationale for change.

Recommendations:

- Assess starting conditions relevant to the change.
- Share assessment findings with all staff and explain how change connects to target outcomes.

### 4. Organizational change in social services requires a three-tiered structure: (a) a clinical model involving service participants; (b) a program model involving staff; and (c) the agency's business model.

Describing the necessary changes and unknowns at each organizational level can minimize staff resistance and mobilize energy and creativity within the organization.



Recommendations:

- Outline the models at each level and share this information with staff.
- Work with staff to identify potential conflicts between the levels and to determine how the organization can address the conflicts to facilitate change.

## **5. Organizational change requires participation at all levels. Solutions to the challenges that arise during such change can surface at all levels.**

Recommendations:

- Solicit frequent feedback from all organizational levels during the change process.
- Engage early adopters who embody the change.

## **6. Able, committed, and enthusiastic middle managers and direct practice supervisors form the engine of change.**

Supervisors must be compelling spokespeople for the rationale and goals. They must be active and effective models of new practices, and have the ability to reward changes and address resistance among employees. These functions require training and support because learning and supervising simultaneously is a daunting challenge.

Recommendations:

- Train supervisory staff in new practices before training employees.
- Support supervisors to lead organizational change and to supervise staff at different skill levels.

## **7. Support “good” risk taking.**

Change involves deviating from established practice and expectations, which can be risky. Mistakes are inherent in learning and can lead to improvement, provided there are candid and timely feedback loops. Supervisors and managers need to tolerate the discomfort that arises when staff members try new practices.

Recommendations:

- Provide training on the new goals and the “good” risks to all staff, management, and board members.
- Encourage supervisors to positively reinforce the desired activities of their employees.

## **8. Clear and open communication is essential.**

Clear communication helps solve problems, inform decision

making and build consensus. Agency committees that address everyday challenges can facilitate communication in times of change.

Recommendations:

- Establish communication channels that increase the likelihood of openness and flexibility.
- Tailor existing channels to problem-solve and oversee changes.

## **9. Training, coaching, and supervision make for a powerful but potentially fractious combination.**

Basic instruction, assistance applying new skills, motivation, and oversight are powerful levers of change. But ambiguity around the chain of command can create confusion, mistrust, and poor morale that can undermine organizational change.

Recommendations:

- Clarify the role of consultants and their relationships to existing supervisors.
- Establish an exit strategy for consultants that will empower existing supervisors.
- Communicate to staff how the agency will resolve differences in opinion between supervisors and consultants.

## **10. Organizational change requires substantial and purposeful efforts to reshape an agency’s identity.**

Organizational change upsets the status quo. Some staff will grieve for the old way of doing business. The agency can help staff to accept change using aspects of the existing culture.

Recommendations:

- Create opportunities to mourn, but do not allow grieving to impede decision-making and participatory planning.
- Consider ways to integrate new values and practices into existing celebrations, public events, and incentive programs.
- Accept that some staff turnover may benefit remaining employees and the agency.

## **11. Evaluation results are only as valuable as the quality of dissemination and application.**

Learning organizations design timely and informative feedback loops to share data about change. Appropriate staff can use this data to further organizational change.

Recommendations:

- Establish and monitor data dissemination plans that target specific audiences.

- Engage participants in the evaluation design. Use evaluation workgroups with representatives from the field and administration. Share data in a timely manner. In the absence of definitive results, offer priority take-home messages as hypotheses for further refinement.

## **12. No agency or initiative is an island.**

Many internal and external factors affect organizational change. A sound change management plan addresses environmental factors outside the agency's control.

Recommendations:

- Anticipate and engage internal and external partners who are likely to affect the change effort.

## **Discussion**

It is our hope that organizations considering a change effort will benefit from the above recommendations for developing and strengthening a learning organization. Although the recommendations seem simple, applying them is challenging. Leaders should be prepared to articulate the rationale and ramifications of a new approach for all three models – the clinical, program, and business – but they also should be aware of unintended consequences. The Casey Family Services staff and finance department enjoyed a “stability dividend” when the agency provided long-term foster care. Social workers had low caseload turnover, which resulted in stable reimbursements. But in implementing the MGP, caseload turnover increased, requiring social workers to work with greater intensity and efficiency to accomplish goals in less time. In addition, reimbursements were less stable until the agency learned to manage the higher turnover rate.

Among the many benefits of the learning-while-doing approach are its iterative, self-reinforcing nature and its capacity to contribute to the knowledge base. Solutions to problems that arise during implementation often help address multiple concerns. For example, incorporating field staff in the MGP oversight workgroup promoted ownership of the initiative, improved measurement, increased the likelihood of applying insights, built champions and peer coaches, and enlisted staff in disseminating findings. It also prepared the practice community and managers to articulate questions and whetted their appetite for more compelling evidence and a deeper understanding of practice. By trading research elegance for practical utility

and feasibility, the approach helps to better specify logic models and define fidelity – prerequisites for more formal and rigorous tests.

The learning-while-doing approach also has its drawbacks. Moving forward without sufficient due diligence and preparation can cause unintended problems. Human service agencies should probably not try this approach without ongoing monitoring of client well-being outcomes, as untested innovation can sometimes do harm or worsen aggregate outcomes (Dimidjian & Holon, 2010). Further, learning while doing may not be appropriate when existing outcomes are satisfactory or the consequences of not changing the status quo are acceptable.

Still, the need for data-driven change management makes the learning-while-doing approach particularly well suited for organization leaders and model developers in human services. Given the near ubiquity of lesson learning in the professional discourse, perhaps fewer mistakes will be made. Yet, despite the best due diligence and careful planning, the nature of organizational change is to present new opportunities. The learning-while-doing approach increases the likelihood that these learning moments will not be missed and that organizational change efforts will succeed.

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**Table 1: Strategic Planning for MGP Support**

	INTENDED SUPPORTS	EARLY CHALLENGES	REMEDIATION RESPONSE	REMAINING CHALLENGES
<b>COMMUNICATING THE VISION</b>  Leadership makes a unifying vision clear at all levels	Clear statement of commitment to best possible outcomes and the importance of family permanence  Executive and division leadership statements of commitment in early regional meetings  Advocating a learn-while-doing approach that emphasizes learning goals and flexibility	Division staff members view administration leadership statements as ambiguous and confusing. Lack of direction regarding specific practice changes as well as magnitude of change  Frustration regarding initial top-down decision to change, and the rationale for change when prior results were deemed very good  Confusion regarding definition of new roles and practices  Supervisors slow to voice support for/model change  Differing perceptions between administration and division leaders and staff concerning model definitions, implementation challenges, and how to define progress	Leaders honed and repeated expectations, guidelines, and procedures; identified areas of flexibility and local choice; and asserted the role of permanence as a critical vehicle to promote well-being without jeopardizing safety  Integration of additional champions among frontline staff  Division leaders conveyed stronger directives about change and increased accountability through use of data  Increased examination of outcome data, as well as focus on youth and family voice concerning value of permanency  Division retreats allowed staff to adapt and plan for change	Narrowing the gap on implementation satisfaction ratings, which are higher among administrators than division leaders  Addressing desire of some division staff to achieve more of a learning environment where division concerns and questions may be raised openly  Coping with ongoing stress of learning while doing
<b>OPERATIONAL PLANNING</b>  Organize the efforts to succeed	Workgroup established with leadership and key agency administrative functions (e.g., executive management, training, operations, and evaluation)  With the support of administration, division directors craft operational plans that reflect local conditions and needs	Inadequate representation of division leadership and staff in workgroup; frustration regarding top-down approach to logistics  Underestimation of need for written organizational procedures and policies at three levels: casework, program staffing, and business model  Insufficient description of new practice model and roles of social worker, family support specialist, and administrative support staff	Division leaders and line staff invited to workgroup  Increased attention to MGP at all meetings  Specific targets established for divisions regarding caseload sizes and census  Integrated MPG practice standards into agency case practice standards manual (CPMS);  Division meetings examined and defined roles, allowing bottom-up planning	Balancing division flexibility to adapt to local conditions with uniform, agency-wide practice  Perceived conflict between permanency practice and census goals  Continued need for clarity on expectations, practices, and goals; comprehensive model fidelity indicators not yet available
<b>RESOURCE SUPPORT</b>  Infrastructure, administrative, and policy complements to increase the likelihood of success	Availability of resources to supplement basic case management services (e.g., flexible funding for treatment and transitional services)  Existing policies and tools (e.g., computerized case information system) support new practices  Provision of new practice tools and resources (e.g., US Search for family finding)	Perceived lack of recognition of time and effort needed for teaming, permanency preparation, and documentation  Staff lack of awareness of existing policies and frustration that some policies preceded practice changes  Increased fieldwork and teaming requires increased telephone and computer connectivity	Research Department conducted studies examining time requirements and barriers to success with the computerized case information system forms (e.g., case reviews, closing summaries) that reflect the new practice  Revised policies to underscore and operationalize priorities (e.g., post-permanency financial assistance guidelines)  Created Belonging and Emotional Security Tool (Frey et. al, 2008) to help engage youth and parents  Increased availability of laptop computers and smart phones	Persistent concerns about time and effort required by new model  Delays in enhancing new case information system
<b>STATE, COMMUNITY, AND FOSTER PARENT PARTNERS</b>  Ensure complementary goals and values among key partners	CFS reputation for quality services and its longstanding relationships with state agencies  Population of "legacy" foster families on whom agency could rely for stable care	State leaders' permanency philosophy not shared by line supervisors and staff, posing challenges to case-level collaboration  Some state agencies still expect CFS to provide traditional long-term foster care services  Some foster families resent MGP because it was not what they signed-up for	Leadership increased outreach to state agencies  Changed pre-service training for resource families to reflect permanency focus  Invited state agencies to permanency trainings, delivered presentations about permanency at state convenings  Improved communication materials explaining MGP to youth, families, collaterals, and state partners	Emergent state directives add procedural changes (e.g., new data entry requirements)  Challenge of finding resource families increases with rapid case turnover  State social workers and supervisors sometimes impede efforts related to teaming, permanency planning, and reconnecting youth to birth families  Some legacy foster families unwilling to make legal commitment to youth

**Table 2: Agency Assets Available to Support the MPG**

	INTENDED SUPPORTS	EARLY CHALLENGES	REMEDIATION RESPONSE	REMAINING CHALLENGES
<b>STAFFING</b>  Line staff provide most services	Committed, highly trained, MSW-level staff  Availability of family support specialists/case aids oriented to new practice model	Varying level of understanding, skills and interest in using new practice  Group of innovators and early adopters grows slowly	Coaching intensified  Early adopter cases spotlighted more frequently for discussion  Management delivered firm message about change, causing some staff attrition but resulting in a more committed workforce	Staff continue to have varying levels of teaming skills  Economic downturn causes agency to freeze hiring, which increases staff caseloads
<b>COACHING</b>  Experts in the new practice inject energy, building knowledge, skills, and confidence	Intensive coaching offers opportunity for selected social workers to develop skills  Monthly group consultation offers all division staff the opportunity to develop skills and familiarity with model	Some staff chafe at working with coaches unfamiliar with agency culture, practices, abilities and role demands; external "experts" seen as "outsiders" departing from tradition  Staff concerned about coaches' perceived inflexible pursuit of legal permanence goals at expense of well-being  Fearing loss of clinical discretion in the face of standardized practice, some staff avoid coaching and do not use new practice  Ambiguous chain of command between social workers, coaches and supervisors  Coaching demand exceeds supply	Additional efforts made to tailor coaching to division strengths and needs  Expanded use of internal coaches, peer-to-peer learning  Coaches encouraged to celebrate and reinforce positive changes along a broader range of permanence and well-being outcomes  Monthly consultations restructured to address staff needs, incorporating interplay between well-being and permanency needs.  Workgroup established policy for parallel supervision and coaching	Continue to refine practice guidelines for integrating team facilitation with case management responsibilities  With coaching more popular among staff, demand still exceeds supply
<b>SUPERVISION</b>  Good supervision is key to learning while doing	Quality supervision with seasoned supervisors	Few supervisors and division leaders have extensive experience with new model  Administration overlooked critical role of supervisors in implementing practice change  Some supervisors are inconsistent about mandating and reinforcing change	New strategy implemented to train supervisors by having each one carry a case and work intensively with a coach  Supervisors provided with heuristic checklists and supervision tools  Additional effort to solidify leadership support	Supervisors challenged with overseeing various types of cases across different programs as supervisees shift from case-specific practitioners to generalists  Supervisors seek additional instruction in supervision technique
<b>TRAINING AND TOOLS</b>  Training and practice tools enhance organizational change effort	Developed and implemented Families for Life training to change critical practice areas (e.g., understanding permanence, facilitating team meetings)  Quantitative evaluation of training indicates significant gains in confidence	Limited tailoring of training at each site; staff express frustration with inadequate appreciation of local practice conditions and prior experience with permanence and teaming  Ambiguity concerning relationship between new and existing practices	Training modified to meet division needs  Developed list of 'non-negotiable' practice components  Provide additional training in reunification, guardianship, and adoption demonstrating how new practices apply to broad range of valued outcomes  Optional tools introduced (e.g., Belonging and Emotional Security Tool (Frey et al., 2008), case presentation outlines, handouts)	Inconsistency in terminology in materials developed over time while learning and doing  Leaders report need for additional training in team facilitation, encouraging difficult conversations, and achieving legal permanency outcomes
<b>CONTINUOUS QUALITY IMPROVEMENT</b>  The existing CQI committee provides an institutional home for reviewing performance indicators and results	Results indicators provide routine agency assessment of progress  Implementation evaluation incorporated at the start of the MGP  Interim feedback provided to management team	Available indicators do not fully reflect all the valued outcomes  Some indicators lack external benchmarks, external comparison or control groups  Unclear timelines for complete implementation undermine consensus about progress  Delays in disseminating feedback beyond workgroup and management team	Expanded data collection, incorporating additional elements in routine documentation  Launched propensity score analysis comparison design  Increased dissemination and discussion of feedback through existing meetings, workgroups, and intranet	Delays in implementing new data collection  Need to enhance timely dissemination of internal evaluation findings

**THE ANNIE E. CASEY FOUNDATION  
CASEY FAMILY SERVICES**

127 Church Street  
New Haven, Connecticut 06510

Phone: 203.401.6900  
Phone: 888.799.KIDS  
Fax: 203.401.6901

[www.aecf.org](http://www.aecf.org)  
[www.caseyfamilyservices.org](http://www.caseyfamilyservices.org)