

# Catholic Charities Performance and Quality Improvement (PQI) Plan

## I. Introduction

### A. Description of the Scope and Purpose of Catholic Charities PQI Program

- Catholic Charities leadership promotes a culture that values service quality and continual efforts by the full organization, its partners, and contractors to achieve strong performance, program goals, and positive results for service recipients.
- The CEO and Diocesan Director endorses:
  - a. a culture that promotes excellence and continual improvement;
  - b. implementation of an organization-wide PQI framework;
  - c. constructive use of data to promote a high-learning, high-performance, results-oriented organization;
  - e. involvement of a wide range of managers and staff in the PQI process;
  - f. inclusion of external stakeholders and community members; and
  - g. an annual score-card or summary report of gains made against goals.
- The PQI framework takes into account all of Catholic Charities regions and sites, and all individuals and families served. Senior managers set forth performance and outcome expectations in a supportive manner and allay concerns about possible repercussions of identifying areas in need of improvement.

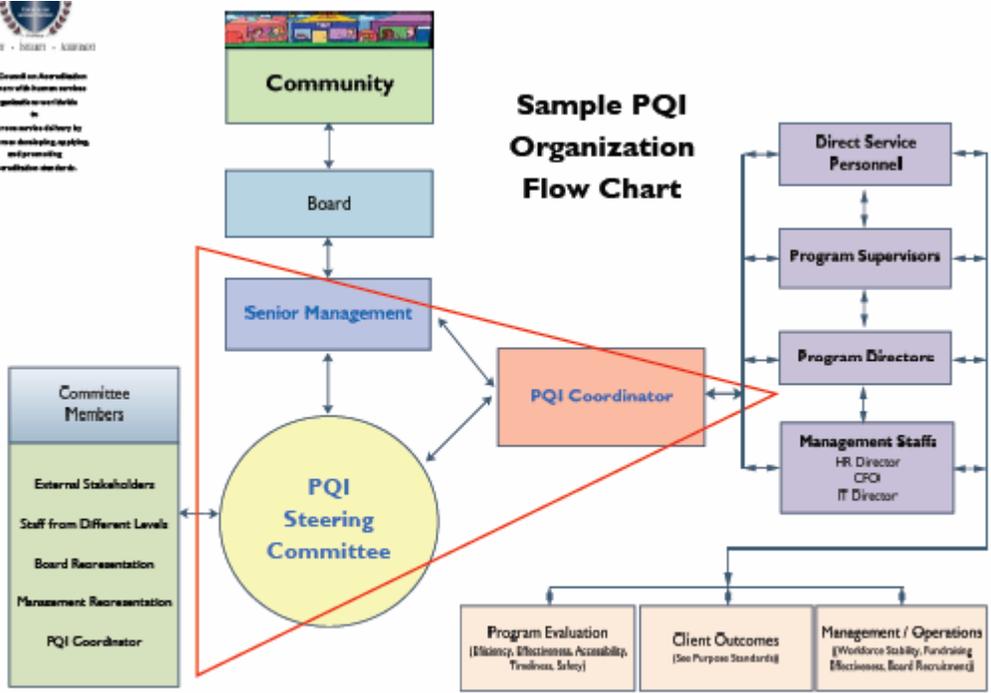
### B. Responsibility for Oversight of PQI

- Catholic Charities charges the PQI Steering Team with constructive use of data to promote a high-learning, high-performance, results-oriented organization.
- Staff assigned to the PQI Team have delegated authority from their Department and are qualified by education, experience or interest to: a. engage people throughout the organization; b. systematically collect information and analyze data; and c. communicate results and recommendations to various key audiences.
- The Director of Quality Improvement is assigned responsibility for implementation and coordination of PQI activities and technical assistance.
- The PQI Team is accountable to the Senior Management Team and to the Board of Trustees via Continuous Quality Improvement and Service Committee.

See PQI Structure and Relationships

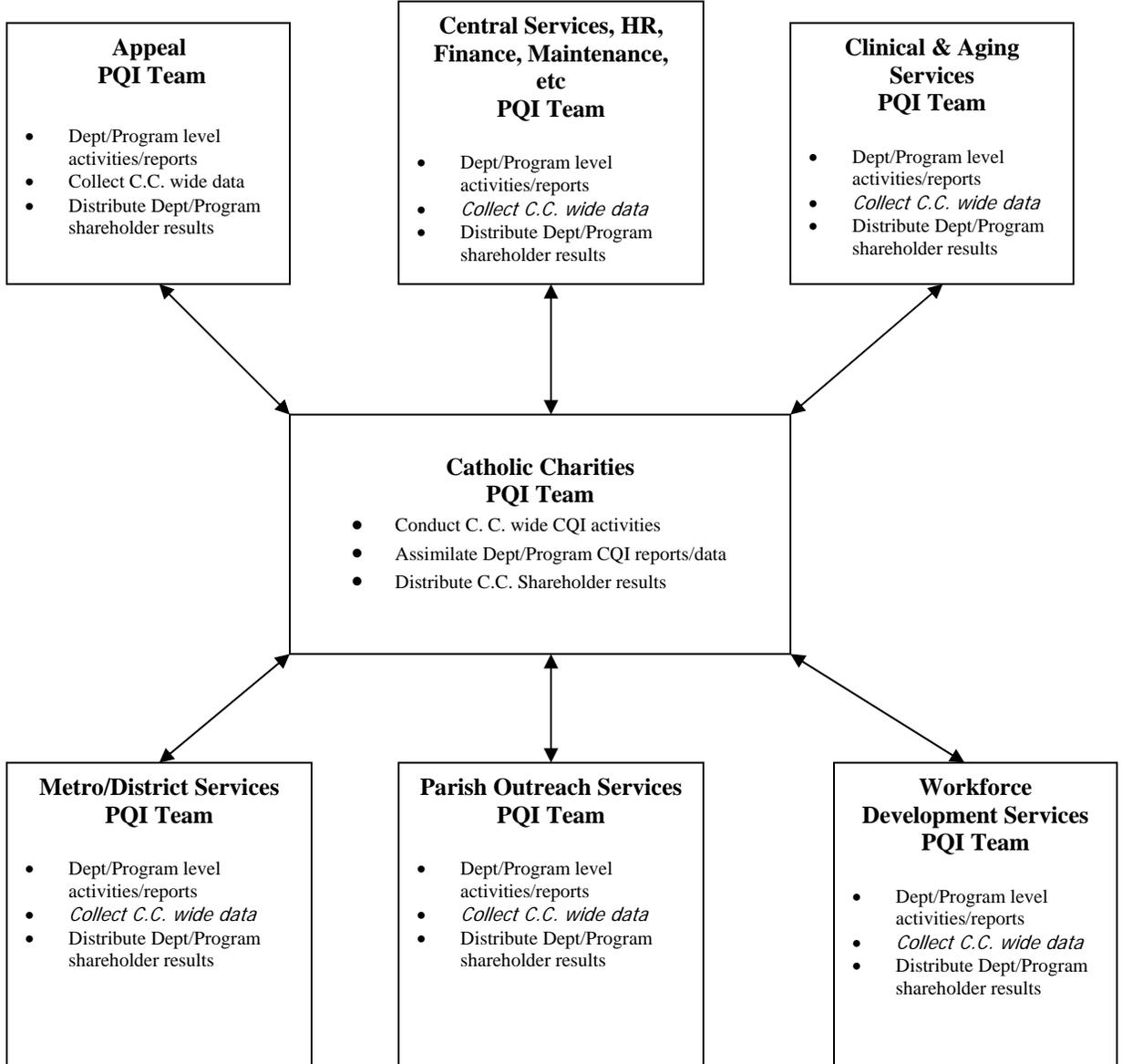


### Sample PQI Organization Flow Chart



To learn more about CAHSO, please call 800-604-4444 or visit [www.caahso.org](http://www.caahso.org) or [www.counsellors.org](http://www.counsellors.org)

# CATHOLIC CHARITIES PQI STRUCTURE

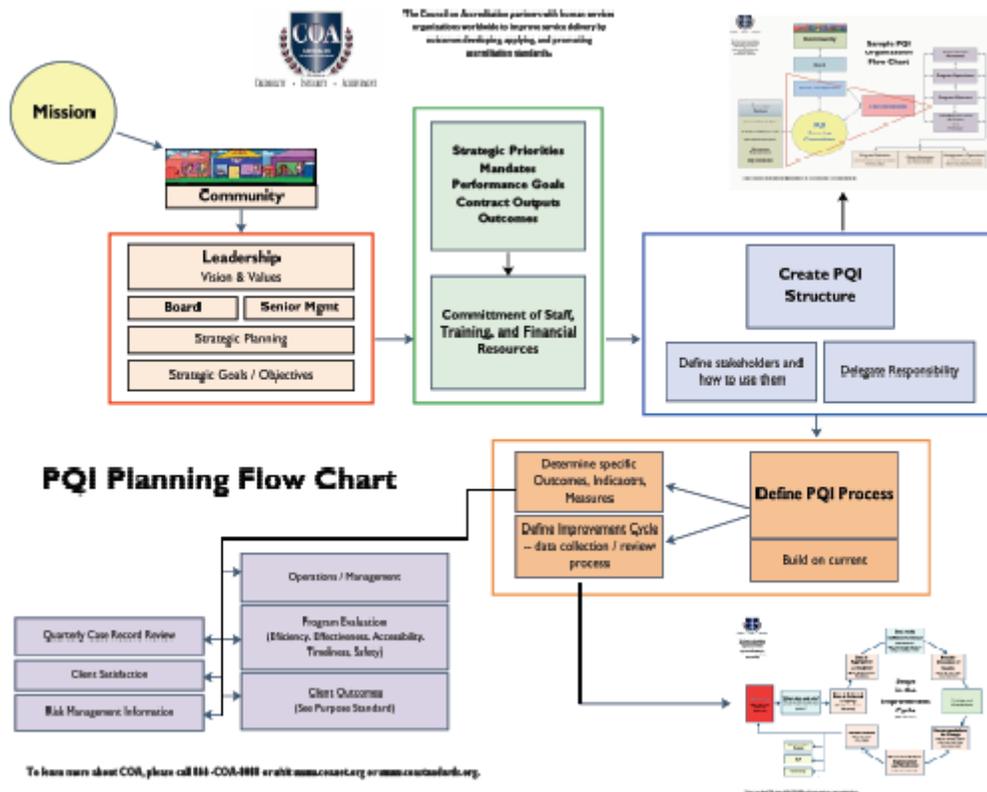


### **C. Stakeholder Involvement in PQI:**

- Catholic Charities defines its stakeholders and specifies how different stakeholder groups will be involved in the PQI process.
- Potential stakeholders include:
  - Persons Served, their Families, and Advocates
  - Board of Trustees
  - Personnel; all levels, employees, volunteers and consultants
  - Funders and Regulators
  - Partner Organizations / Other Service Providers / Provider Associations
  - Other Community Representatives
  - Business, faith-based, volunteer civic organizations
  - Courts / Probation / Parole
  - Public Agencies
  - Organizations Providing Services Under Contract
  - Elected Officials
  - The Media
  - Consumer advocates
  
- Inclusion of external and internal stakeholders; work together to:
  - a. develop key outcomes and outputs;
  - b. develop relevant qualitative and quantitative indicators; and
  - c. identify data sources, including measurement tools and instruments.
  
- How can we involve our stakeholders?  
Here are just a few of the many ways to involve stakeholders in our PQI process:
  - Sit on our PQI Committee
  - Participate in ad hoc or ongoing work groups
  - Partner with staff to develop outcomes and indicators
  - Review reports and provide feedback
  - Help identify positive practices
  - Recommend improvements when necessary
  - Work with the Board and management on short- and long-term planning
  - Have staff administer measurement tools and collect data
  - Conduct surveys and/or focus groups
  - Ask for input at regular meetings of our community partners
  
- Internal and external stakeholders review performance data and outcomes results in order to:
  - a. identify strengths and areas of positive practice; and
  - b. provide feedback about areas of needed improvement.
  
- Catholic Charities leadership, including board or advisory members, and PQI personnel communicate with staff and stakeholders about achievements relative to desired outcomes, indicators, and benchmarks or targets.

## II. Measures and Outcomes

### A. What to Measure:



### 1. Management / Operations Performance (generally 2 or 3 measures at any given time)

- The PQI Team establishes a periodic review of essential management and service delivery processes consistent with quality priorities. Staff throughout Catholic Charities and stakeholders, including partners and contractors, work together to:
  - a. develop key outcomes and outputs;
  - b. develop relevant qualitative and quantitative indicators; and
  - c. identify data sources, including measurement tools and instruments.
- Catholic Charities selects performance measurement indicators that relate to operations and management, program results, and client outcomes.
- Possible management operations outcomes and data sources include:
  - a. Financial Viability
    - Monthly reports of financial performance (Fin 5.04a and b)
    - Cost analysis of services (Fin 5.05; 5.06)
  - b. Workforce Stability
    - Workforce gap analysis (HR 2a)
    - Staff satisfaction surveys (HR 4.03; 4.04)
    - Staff retention data (HR 4.03; 4.04)

- Analysis of employment patterns (HR 5.04)
- Workload / caseload size reviews (Service Sections)
- c. Board Diversity/Recruitment (GOV 2.02; 2.03)
- d. Safety and Security
  - Accidents, incidences and grievances reports (RPM 2.02)
  - Monthly facility Maintenance Reports(ASE 4; 6.01; 6.02)
  - Risk management reviews (RPM 2.01)
- e. Effective Fund-raising
  - Ethical fundraising practices (ETH 3)
  - Stable income (FIN 4)
  - Resource development (GOV 6.05)

- For each identified objective what is being measured is specified.

## **2. Program / Service Delivery Effectiveness**

- The PQI plan:
  - a. assigns responsibility for implementation and coordination of PQI activities and technical assistance with the PQI Team;
  - b. sets forth the purpose and scope of PQI activities as defined in Section I.A;
  - c. establishes a periodic review of essential management and service delivery processes consistent with quality priorities;
  - d. outlines methods and timeframes for monitoring and reporting results; and
  - e. includes provision for an assessment of the PQI program's utility, including any barriers to and supports for implementation.
- Catholic Charities selects performance measurement indicators that relate to operations and management, program results, and client outcomes.
- The PQI plan describes how valid, reliable data will be obtained and used on a regular basis to advance monitoring of actual versus desired:
  - a. functioning of operations, that influence Catholic Charities capacity to deliver services;
  - b. quality of service delivery;
  - c. program results;
  - d. client satisfaction; and
  - e. client outcomes.
- Collection of service delivery information focuses on key quality factors, including accessibility, appropriateness, availability, continuity, efficiency, effectiveness, safety, timeliness, and respectfulness or any of the other dimensions of quality.

### **a. Case Record Reviews**

- Catholic Charities reviews case records to identify patterns. Quarterly reviews of case records:
- a. evaluate the presence, clarity, quality and continuity of required documents using a uniform tool to ensure consistency; and
  - b. include a random sample of both open and closed cases.

**b. Client Satisfaction** (PQI 4.02c)

Customer satisfaction data, usually annually.

**3. Client and Program Outcomes**

- Consistent with Service Category Standards and Program Specific Narratives.

**III. PQI Operational Procedures**

**A. Overview of PQI Data Collection Process**

- What Is Being Measured?
- Why is it Being Measured?
- Data Source
- Who Is Responsible?
- How Frequency?
- Tool/ How Will Data Be Collected?
- How/Who Will Data Be Aggregated And Reports Generated?
- In What Format?
- Who/When Will Results Be Reviewed And Interpreted?
- To Whom Will Recommend Actions be Made / Timeframes?
- Who Will Implement/ Over-See Recommended Changes?

See ***PQI Operational Procedures Worksheet***.

**B. Reporting Data**

1. Process for Aggregating Data to be generated and standardized.
2. Report Formats to be generated and standardized.

**C. Data Review and Analysis Process**

- Managers regularly review and discuss PQI reports to identify areas of needed improvement, set improvement activity priorities, and manage their operations and programs.
- Performance and outcomes expectations and achievements are reviewed by stakeholders on a regular basis and revised based on what is learned.
- Catholic Charities, as an intergraded organization:
  - a. reviews results;
  - b. identifies areas of needed improvement;
  - c. implements and evaluates improvements on a small or broad scale;
  - d. modifies implemented improvements as needed; and
  - e. keeps staff informed and involved throughout the cycle.
- Internal and external stakeholders review performance data and outcomes results in order to:
  - a. identify strengths and areas of positive practice; and
  - b. provide feedback about areas of needed improvement.
- Internal and external stakeholders review and discuss the results of implementing improvements to inform future decision making.

- Sufficient resources are allocated to lead and facilitate collection and analysis of data.

#### **E. Communicating Results**

- An annual score-card or summary report of gains made against goals is published.
- Senior managers regularly review and discuss PQI reports to:
  - a. identify areas of needed improvement;
  - b. set improvement activity priorities; and
  - c. manage their operations and programs.
- Internal and external stakeholders review performance data and outcomes results in order to:
  - a. identify strengths and areas of positive practice; and
  - b. provide feedback about areas of needed improvement.
- Improvement efforts and successful changes are evaluated and communicated throughout Catholic Charities.

#### **F. Using Data for Implementing Improvement**

- Catholic Charities, as an intergraded organization:
  - a. reviews results;
  - b. identifies areas of needed improvement;
  - c. implements and evaluates improvements on a small or broad scale;
  - d. modifies implemented improvements as needed; and
  - e. keeps staff informed and involved throughout the cycle.
- Leadership, including board or advisory members, and PQI personnel communicate with staff and stakeholders about achievements relative to desired outcomes, indicators, and benchmarks or targets.
- Improvement efforts and successful changes are evaluated and communicated throughout Catholic Charities.

#### **G. Assessment of the Effectiveness of the PQI Process**

- The plan also includes provision for an annual assessment of the PQI program's utility, including any barriers to and supports for implementation, part of the PQI Annual Report.

