

Evaluation of Lifeworks' Progression Tool

Humphrey School Capstone Report

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Lifeworks Services



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*Lifeworks*WORKS

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Executive Summary

This evaluation seeks to analyze the effectiveness of the progression tool Lifeworks uses to develop person centered curriculum in their Community Skill Building (CSB) groups. Further, this evaluation seeks to provide Lifeworks guidance on how to revise the progression tool to improve the user experience and better meet the needs of program clients and staff. It consists of four interviews with Lifeworks Community Skill Building group facilitators, specialists, and managers at four sites: three in the Twin Cities Metro region and one in Mankato. Though this was a smaller sample size than initially intended due to the COVID-19 pandemic, the evaluators feel that the recommendations outlined in this report are still worthwhile for Lifeworks to pursue, given the results we gathered. These recommendations are aimed at improving both the **content** and **user experience** of the tool:

- 1. Hold bi-monthly meetings with CSB staff members specifically about how they utilize the progression tool.**
- 2. Create standardized policies surrounding the progression tool.**
- 3. Encourage innovation and adaptation when administering the tool.**

Based on our findings, we believe that these recommendations will allow for Lifeworks' to continue providing the tool to their CSB participants in a person-centered way, while alleviating some of the administrative burden currently on service specialists and facilitators. By creating a culture around the progression tool that incentivizes idea sharing and innovation, staff members will be able to seek organizational support and will have a more positive experience with the tool overall.

Introduction

Lifeworks was founded in 1965 by families of people with disabilities as they sought alternatives to State-run institutions. Since then, Lifeworks has established multiple service lines through which they support people with disabilities by assisting them in finding employment, increasing their independence, and providing opportunities for increased quality of life. Operating throughout the Twin Cities Metro and Mankato, Lifeworks offers both day services, as well as integrated programming in the broader community through partnerships with businesses, community centers, and the like. Through Lifeworks' Day Services Social Enrichment programs, Community Skill Building groups, and Employment Services, Lifeworks' staff support persons served as they seek opportunities to enrich their everyday lives.

Evaluation Aims

For the purposes of this project, we evaluated the progression tool currently used by Lifeworks to establish person-centered plans for the individuals they support in their Community Skill Building groups. This tool is intended to assist participants in developing skills that allow them to be more independent as they work towards their future goals. This evaluation aims to understand two facets of the Progression Tool, its **content** and the **user experience** of completing it. By analyzing these two pieces, we aim to identify concrete steps Lifeworks can take to maintain the person-centeredness of the Progression Tool process, while alleviating some of the more stressful aspects of the administrative process.

COVID-19 Response

In light of the COVID-19 pandemic, the scale of our research has significantly decreased and many of the evaluation plans that were originally feasible have since become impossible in the evaluation's three month timeline. Due to social distancing guidelines, meeting in person with specialists and facilitators at the group's meeting location was no longer possible. This has significantly reduced the amount of interview data we were able to collect and limited the number of CSB spaces we were able to observe. Additionally, our plan to hold a focus group was

no longer an option. Instead, the evaluation team worked with Lifeworks to interview staff who were still available over the phone, and have utilized the data we were able to collect to provide steps for the future, once Lifeworks returns to normal services. Finally, because the progression tool is used to design CSB group activity schedules out in the community, and is used only in a context of the existing CSB services, the results of this evaluation may have limited use until more typical CSB services are resumed.

Evaluation Design

This evaluation is a continuation of a previous report conducted during the Humphrey School's PA-5311 course and focused on a broad array of issues related to the progression tool and both its person-centeredness and effectiveness. This evaluation picked up where the previous one left off by taking a deeper look at how Lifeworks staff use the progression tool. Specifically, the evaluation aimed to investigate **how to improve the progression tool by investigating the variable ways clients and staff use the tool and their personal experiences with filling it out.**

Logic Model

The below logic model is a visual tool outlining the shared understanding of Lifeworks operations among staff, leadership, funders, and evaluators. The model depicts connections between the program's inputs and activities and resultant program outputs and outcomes including providing context into how the progression tool fits into the picture.

Inputs	Activities	Outputs	Outcomes
<ul style="list-style-type: none"> -Participants -Service Specialists -Service Facilitators -Therapists (Music, Art, OT, etc.) -Administrative Staff including: IT Advancement Transportation Payroll/Billing -Employers of Lifeworks' participants -Funding/money 	<ul style="list-style-type: none"> -Creation of Coordinated Services and Support Plan/CSSPAs (personalized goals based on what each individual wants) -Person-driven approach to determine program participation -Use of the progression tool -Assisting participants in developing life skills (i.e. cooking, riding public transit, etc.) -Administration of meds/ assisting with medical needs of participants -Transporting participants to and from their homes, job sites, day program, etc. 	<ul style="list-style-type: none"> -Jobs -Independence -Personal growth -Community belonging -Health needs met -Happiness -Accurate measures of ability -Higher retention within fields 	<p style="text-align: center;">Short-Term</p> <ul style="list-style-type: none"> -Match participants to jobs they are going to be successful in. -Increase individual's autonomy and independence. <p style="text-align: center;">Mid-Term</p> <ul style="list-style-type: none"> -Participants are able to continually meet and change their goals as they see fit -Staff can tailor programming so the person served is successful and happy with their program. <p style="text-align: center;">Long-Term</p> <ul style="list-style-type: none"> -Improve overall quality of life for people with disabilities. -Sustain a person-centered approach model where the person served is driving the discussion about how they spend their time.

Key External Factors

- Highly affected by legislation and the political climate, particularly with regard to funding.
- Ability to procure jobs people both want and are suited for is dependent on job market, economy, etc..
- Identifying and developing employers willing to employ and learn how to work with individuals with disabilities.
- Guardian/Support systems
- Transportation needed for employment
- Bias/Ignorance around individuals with disabilities and the disability community.

Assumptions

- Person centeredness should be at the heart of all Lifeworks programming.
- That when a person comes to Lifeworks for a program, they should be the one driving the conversation about what that program is and what their personal goals are.
- That families, individuals, and Lifeworks team will agree to the person centered decisions made.

Understanding the Progression Tool

Progression tools are used by Lifeworks' Community Skill Building groups so that participants can identify the types of activities that they are interested in learning about. The tool was developed by a long-term Lifeworks' staff member, and helps CSB facilitators and specialists **prioritize different group activities based on client interest**. These activities might include learning to use public transportation, relationship development, cooking, and a variety of other skills that help gain independence and quality of life. Participants can identify as few or as many activities as they want, and program staff use the results of the tools to assist participants in achieving their goals and highest level of independence possible.

There are eight sections to the progression tool including: Employment; How I get places; What I do in the community; What I do at home; Technology; What I do for my



well-being; My relationships with people; and, My progress. The first seven sections are each composed of four to nine subsections which consist of a series of questions pertaining to

specific skills. Community Skill Building group facilitators and specialists complete the tool by having clients fill out the tool by themselves or going through the questions with their clients. For each question, clients or facilitators are supposed to rank how independently they are able to complete the skill on a scale of 1-3 (1 = I need help all of the time; 2 = Sometimes I need help; 3 = I do this by myself). Clients or facilitators and specialists are also prompted to note whether this is a skill that they are interested in learning about or if it is a skill that they do not want to learn about. After collecting progression tools for their Community Skill Building groups, Lifeworks facilitators and specialists tally up the groups interest in the different categories. They then use these tallies to determine what specific activities are most and least popular within the

group and create a schedule based around the group's interests, **with the ultimate goal of assisting participants in developing skills to increase their autonomy and achieve their personal goals.**

Evaluation Questions

The evaluation focused on a series of questions related to the perceived effectiveness and user experience of the progression tool. These questions were in part derived from the conclusions and recommendations from the previous evaluation, and in part derived from preliminary conversations between the evaluation team and Lifeworks staff. Questions were designed this way so that we could build a unique evaluation based on the data previously collected, in a way that felt like a natural sequence, while also taking into account that we wanted to emphasize specific content and usage changes that could improve the progression tool process. As such, the following were our guiding evaluation questions meant to guide our data collection and analysis.

- What is already working well with the progression tool and what could be improved with the progression tool?
- How satisfied are Lifeworks' clients with the progression tool process?
- How can we make the progression tool easier to use for service specialists?
- How can we make it more accessible to use for all?

Scope and Timing

Given the results of the evaluation done last semester, we centered our evaluation on **two key points: the content of the tool and how staff members fill it out with their groups,**

which we defined as the user experience. It was important that we narrow our scope to these two areas to ensure that we could identify specific reasons that the tool was or was not useful for those interacting with it the most--clients and service specialists. We designed our interview protocol with this scope in mind, aiming to elicit specifics from service specialists about what they did and did not find useful about the current procedures around the progression tool. Our questions focused on each of these two points of emphasis so that service specialists could narrow in on specific sections or questions that they find more or less helpful, as well as think intentionally about how much time they spend completing the tool and using the tool for their work.

Initially, we had planned to gather our data and spend the latter half of the semester designing and prototyping a revised tool. As the COVID-19 pandemic developed, we had to shift the timing of our evaluation and were not able to complete as many interviews as we would have liked. We worked with our point of contact to continue interviewing staff members who were available, but we no longer had the capacity to build a revised tool and workshop it with staff members. While our evaluation shifted away from designing a prototype, it has shifted towards creating space and guidance for staff members to adapt the tool to their own contexts and needs, **increasing its person-centeredness while maintaining the usefulness of the data it produces.**

Data Collection Methodology

In the initial stages of the evaluation, the proposed plan for the evaluation team was to survey and interview Lifeworks's clients and community skill building facilitators and specialists, and document their perspectives and experiences of using the progression tool. From this data we hoped to develop a series of recommendations to improve the usefulness of the tool in its varied contexts and to build a prototype that incorporated the staff's suggestions as a way to begin the process of building an updated model. In addition to the survey and interview data, part of the planned data collection process included observing the structure of community skill building groups and holding a community skill building focus group. The focus group would have brought all Lifeworks' staff who use the progression tool into the same room to reflect on

how the current tool is being used and brainstorm ways to improve the entire process. However, due to the COVID-19 pandemic, the scale of our study was reduced and our data collection methods shifted. Once Minnesota's stay at home order went into effect, the evaluation team shifted the focus of the study solely to interviewing Lifeworks staff involved in, or having knowledge of, the progression tool process and creating recommendations for how Lifeworks could potentially go about improving the tool. While this was not what the team had initially envisioned, the data we collected still builds upon the previous evaluation and provides insight into the successes and failures of the current progression tool. As will be explored in our recommendations, we believe that the findings of this report remain useful, not only as Lifeworks begins to transition back to regular services, but also once Community Skill Building groups can return to more normal activities in the community.

Prior to the COVID-19 pandemic, the evaluation team successfully completed two in-person interviews with service facilitators and specialists. These interviews took place at James J. Hill Center in downtown St. Paul, MN and at the ABM offices in Golden Valley, MN. After the Governor issued a "stay at home" order, the evaluation team conducted two more interviews - one with a service specialist based out of Richfield, MN, and one with a program manager based out of Mankato, MN. Interviews generally lasted around thirty minutes and followed a semi-structured format using the interview protocol seen in Appendix 1.

The evaluation team taped the interviews and created contact notes summarizing the conversations. Each evaluation team member took their own notes of the interviews which were then compared to triangulate findings. After the interviews the evaluation team also held debriefs to go over our immediate thoughts and confirm or challenge our observations. From the contact notes the evaluation team next analyzed the interview data and synthesized a list of themes and observations from the four interviews which are presented in the next section.

Results

Format of the Progression Tool

Overall Lifeworks staff seemed to acknowledge the importance and format of the progression tool and the usefulness of the data that it produces. Interviewees mentioned that they

believed the format of the tool covered a **broad number of skills** and hit on the **key topics of interest** for the clients. Interviewees also mentioned that tracking these topics and specific skills was useful to **observe client progress** and also provided necessary data to produce monthly calendars and schedules for the group based on interest in topic areas.

“Once you’ve got a baseline, it’s really helpful because you can see progress.”

However, Lifeworks staff also made note of the tool’s **unwieldy format** with several interviewees suggesting that the tool could be paired down in various ways such as deleting or combining redundant questions and forgoing irrelevant sections. A number of interviewees expressed that they **did not feel like they had enough time** to complete the progression tool.

“When I do it, it is beneficial...[but] time is something I don’t have.”

One interviewee described their experience with the process as “**negative**” and “**a slog**.” Another interviewee expressed that group scores do not change substantially from quarter to quarter and data trends of what the group ends up agreeing upon normally only change when new group members arrive or old members leave. Interviewees also indicated that they knew their clients well enough to accurately guess which topics and themes would be most popular with their group members. Multiple said that they’ve gotten to the point with many of their group members that they can **individualize the tool on the fly** depending on what they’ve talked to them about and what they know about them. However, one interviewee also indicated that the tool does help **uncover blindspots**. When asked how the format of the tool could be improved to address these concerns, one interviewee responded that they thought the tool should be standardized and then adapted to context.

Necessity of the Tool's Topics and Scope

In general the Lifeworks staff felt that all the topics and scope of the progression tool focused on relevant skills for their clients to learn. However, interviewees also mentioned that the location of their CSB group, or their own comfort and interest with the topic area, prevented them from including certain topics in their monthly schedules (ex: kitchen related skills are hard

“All the sections are necessary.”

to learn without a kitchen). When asked about specific sections that they found to be the most necessary or popular, interviewees had varied responses; but, a number of them mentioned the **“What I do in the community” section and the technology section as the most popular.** Additionally, one interviewee stated that they thought all the sections were important and another one mentioned that relationships were a popular topic in their group. In order to maintain the flexibility of the tool and to allow for variation between programs, these results might suggest that maintaining all sections is important, but editing or combining subsections or individual questions is preferable to streamline the process.

How do staff fill out the tool?

Throughout the interview process the evaluation team found a few trends regarding how facilitators go about administering the progression tool. In some cases, staff found that the dynamic of their group meant that it was most beneficial to fill out the progression tool as a group. Others felt that they were able to achieve the most person-centered results by filling them out individually. There seemed to be a theme here about why facilitators felt their method yielded the best results. **Those who filled them out as a group found that this method encouraged conversation between participants so that they could better understand the activities mentioned in the tool and decide whether it was something they really wanted to learn.**

“Filling out the progression tool is more of a conversation.”

Multiple facilitators mentioned that if someone said they were interested in an activity, their friends were more likely to ask questions and be interested in that activity as well, which not only created more consensus about the group’s activities, but also allowed participants who wouldn’t normally speak up about their interests to make their opinions known. In a similar vein, **the facilitators who filled it out individually found that going through sections one-on-one with participants meant they could ask follow up questions specific to the client, or skip questions that they knew were not relevant for that individual** (i.e. a person who didn’t have an iPad would not have to answer the questions about learning how to use their iPad). In general, it seemed that facilitators had implemented some trial-and-error in order to determine the mode of administration that best served their group and the interpersonal dynamics therein. For example, multiple interviewees mentioned their group’s dynamic being specifically conducive to filling it out as a group, either because many of them had been together for a while, or because of the culture they had built around the group’s usage of the tool.

Just as there were discrepancies in the environment in which they filled out the tool, there



was also a difference in the way they completed it.

Some facilitators found that it was easiest to fill out the tool on paper, where they could tally and add results by hand. Others filled it out on a computer.

The trend we identified here was that some

facilitators felt quite comfortable with Excel and the auto-tabulation feature, whereas others found it was more efficient for them to tally by hand rather than try and learn the Excel commands others were using. This trend seemed to be a product of existing skills with the format

of the tool, rather than a conscious choice. It also seemed to correlate to whether or not they filled it out in groups or individually; **those who filled it out in groups filled it out on paper, because they weren't always somewhere that had enough computers to fill it out all at once. Those who administer it individually typically use a staff laptop and tend to prefer filling out progression tools on the computer.** Thus, the format they chose to complete it in was more a product of the way they wanted to complete it with their participants, rather than a particular preference for print or computer.

How is the tool used?

There seemed to be a general agreement that the data that the progression tool yields is worthwhile. **Every facilitator said that they used the results of the tool to inform the calendar that they made for their group's activities.** Most mentioned that the answers helped them understand any changes in both individual skills and interests as well as how the group's interests had changed.

“This can really be so tailored and individualized, and still you can get an idea of where your group wants to go.”

Most went through the process of administering the tool with the members of their group, then added the results of each section, and organized the group's calendar for the next quarter based on the most agreed upon activities. There was significant variation in how long staff spent analyzing the data from the tool. Some spent a few hours a month, others a few hours a quarter, reviewing the results and making a new calendar. This correlated to the way they filled out the tool. Those who expressed comfort with Excel spent much less time tallying each section, whereas those who completed it on paper spent more time. **It also appeared that there was still a discrepancy in how often facilitators were completing the tool, which accounts for the difference in time spent analyzing.** Completing it monthly requires approximately three times

as much administrative time as those completing it quarterly, according to the facilitators who were interviewed.

Multiple facilitators also brought up the value of the tool for both their own one-on-one meetings with their group members, and for annual meetings with client's parents/guardians and their case managers as they discuss progress and skill development with the other people involved in each client's life. This is especially true for activities that facilitators can't devote time to in the CSB group. For example, many CSB groups don't have access to a kitchen. Thus, it is nice for facilitators to be able to share with parents or group-home staff that this client has expressed interest in learning more about cooking. **This expands the effectiveness of the progression tool and the CSB groups** in general, because individuals can pursue the development of skills they are interested in both in and outside of Lifeworks' day services.

Conclusion and Recommendations

This evaluation focused on analyzing the user experience and content of the Lifeworks progression tool. Over the course of the semester the evaluation team conducted four interviews, documenting the perspectives of Lifeworks staff and uncovering valuable information regarding the tool's content and user experience. While the evaluation plan and design was significantly altered by the COVID-19 pandemic there are still important lessons to be learned from this report. Further, because the use of the progression tool is contingent on CSB service to continue, Lifeworks may need to wait to implement parts of these recommendations with their CSB groups. While certain steps and actions may be explored prior to returning to normal, these steps still require Lifeworks facilitator and specialist participation. Based on results from the interviews described above, there are several recommendations for the progression tool and future evaluation studies including:

Progression Tool Recommendations

- 1. Hold a CSB bimonthly meeting focusing on the progression tool.** In lieu of the focus group that the evaluation team had hoped to facilitate, we recommend creating a space to

promote open dialogue between specialists and facilitators focused on the progression tool process (format, length, expectations, and use) to further flesh out and understand how the tool operates in the different CSB group contexts and how it can be adapted to operate more efficiently and effectively. This discussion would be best to have in person, but depending on how long CSB groups are put on hold it could also occur using conferencing technology given facilitators and specialists participation. Questions to consider in order to prompt discussion and focus the conversation could include:

- a. How do you use the tool and why?
- b. What parts of the tool can and/or need to be changed?
- c. How can you, as a facilitator or specialist adapt the tool to better suit your needs?
- d. What would a standardized policy look like for filling out the progression tool?
- e. What would be innovative ways to collect the data?

2. Create a standardized policy for the progression tool. Each CSB group administers the tool differently, and the lack of a standardized process has led to confusion and variable buy-in to the tool. We recommend creating a policy for facilitators and specialists to follow with clear expectations, ensuring staff the flexibility to adapt the tool to the different CSB group contexts, but ensuring that all groups know what is expected of them and when. Elements of the policy could include:

- a. A clear set of expectations for the timeline to fill out the tool (every month, every quarter, etc.).
- b. Guidance about how to fill out the policy given time and staffing shortages.
- c. Guidance about how to adapt the tool to the CSB group context, keeping necessary questions while removing “clutter” questions.

3. Encourage facilitators and specialists to innovate while collecting the data: Facilitators and specialists noted various reasons as to why they found the process of filling out the progression tool to be difficult. Encouraging facilitators and specialists to create and modify the tool format to better fit their needs can potentially result in solutions. Potential modifications to the progression tool include:

- a. Creating a paper friendly version, that can be easily printed for use in a variety of settings;
- b. Creating multiple versions, so that facilitators can adjust their administration of the tool based on whether they want to complete it with their group or with each individual;
- c. Completing workshops or meetings where specialists and facilitators can learn skills like Excel or scheduling programs that could help them cut down on time spent processing the tool.

Future Evaluation Recommendations

There are also a number of next steps that Lifeworks should consider to more fully complete and strengthen the results of the report including:

1. **Interview the remaining Lifeworks specialists and facilitators** to increase the sample size and strengthen the report's findings.
2. **Conduct a focus group with specialists and facilitators**, to supplement the data included in this report and provide a facilitated space for Lifeworks staff to share ideas and express their opinions.
3. **Develop a prototype of the progression tool** to test in CSB groups based on a more complete analysis of the progression tool.

Based on our research and findings we believe that these recommendations can help to make the process of administering the progression tool more user friendly and the content of the tool more applicable to each CSB group context. We believe that fostering this environment of open dialogue and creating a team-oriented approach to progression tool processes will ensure that staff feel supported in their efforts while ensuring person-centered services for people in the CSB groups.

Appendix

Staff Data Collection Interview Protocol

1. How do you go about filling out the progression tool with your group? Are tools completed individually or in groups? Are they completed on paper or digitally? Etc.
2. How do you use the data collected from the progression tool?
 - a) Do you find that the way the progression tool works currently is suited to your use of the data you collect?
 - b) In an ideal world, what is your vision for how the progression tool should be used?
3. Do you like the format of the progression tool and the user experience of filling it out? Why or why not?
 - a) What ways, if any, do you feel that the format of the progression tool could be improved to be more user-friendly?
4. Are there any sections of the progression tool that you find to be most necessary in your creation of your group's activities or calendar?
5. Are there any sections of the progression tool that you find to be unnecessary or less useful when you create your group's activities/calendar?
6. Can you estimate how much additional administrative time do you spend dealing with the progression tool, including but not limited to: entering answers into computers, tallying preferences, making calendars based on responses, etc.
7. Other than what you have already mentioned, what do you like about the progression tool? Is there anything other than what you've already mentioned that you'd like to see improved?