Strategies for Addressing Common Implementation Challenges in Healthy Marriage and Relationship Education Programs:

A Guide for Supporting Program Improvement Efforts

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OPRE Report #2022-314

December 2022

Suggested citation: Friend, Daniel, Lauren Mattox, Annie Buonaspina, Avery Hennigar, Scott Baumgartner, and Angela Valdovinos D'Angelo (2022). *Strategies for addressing common implementation challenges in healthy marriage and relationship education programs: A guide for supporting design and improvement efforts,* OPRE Report #2022-314, Washington, DC: Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

For more information about the Strengthening the Implementation of Marriage and Relationship Programs project, please visit project web page.

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SIMR
Strengthening the Implementation of Marriage and Relationship Programs

Background and purpose for guide

Healthy marriage and relationship education (HMRE) and similar programs face common implementation challenges, such as difficulty recruiting and enrolling participants or encouraging them to attend program services consistently. To address these common challenges, HMRE practitioners should regularly engage in continuous quality improvement (CQI) efforts. CQI involves identifying programmatic challenges and developing and testing strategies to address those challenges. As part of this process, practitioners could benefit from consulting research from the field, seeking advice from organizations that offer similar services, or using their relationships with experts to identify solutions to the specific programmatic challenge they would like to address. This information could help practitioners understand what has worked or might work, before developing and testing the strategies to address their challenges. It can be challenging, however, for many HMRE practitioners to access these resources. Practitioners might lack access to academic journals or not have the time to consult them. In addition, they might not have broad practitioner networks or relationships with experts to tap into to learn about promising approaches. This guide aims to address these potential gaps. It offers a range of strategies for HMRE practitioners to consider to address their implementation challenges.

The Office of Family Assistance (OFA) within the Administration for Children and Families (ACF) has provided resources to support HMRE practitioners' CQI efforts, including tools, tip sheets, and other resources that can be found here. This guide is designed to be an additional tool to equip HMRE practitioners as they engage in the CQI process. It includes a set of promising approaches—each containing a set of specific strategies to address common challenges. This guide is a starting point for HMRE practitioners and those supporting them (for example, project officers, technical assistance providers, or evaluators) as they begin to think through ways to address their implementation challenges. It highlights strategies practitioners might adopt, refine, and test to address these challenges and improve their HMRE programs.

In 2019, ACF's Office of Planning, Research, and Evaluation (OPRE) launched the Strengthening the Implementation of Marriage and Relationship Services (SIMR) project. The project intends to identify and test strategies for addressing common implementation challenges related to recruitment, retention, and content engagement for HMRE grantees, funded by OFA. Challenges in these areas stem from a variety of causes and, ultimately, can limit a program's

Mathematica · Public Strategies · OPRE · OFFICE OF FAMILY ASSISTANCE An Office of the Administration for Children & Families · HMRF HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD effectiveness. Box 1 provides more on the goals and research process for SIMR.

The SIMR project began by identifying a list of common recruitment, retention, and content engagement challenges, as well as promising strategies to address those challenges. To gather this information, the SIMR study team conducted a comprehensive review that drew on multiple sources, including peer-reviewed journal articles, HMRE grantee reports, and expert interviews and engagements. Box 2 briefly summarizes our methods, and the technical appendix contains more details. The goal of sharing these findings is not to present a set of strategies that can be applied uniformly across programs but to present ideas for high-level practices that HMRE providers can adapt to fit individual program contexts and test through CQI efforts. It was not the purpose of SIMR to test the identified strategies for effectiveness. Instead, the project collected a set of promising approaches based on the academic literature and consultation with experts that could be implemented and tested in specific contexts. This guide aims to support continued research on how the strategies can be implemented and tested in new contexts and the types of adaptations that might be needed to support positive outcomes. The implementation and success of the strategies will likely vary based on additional criteria, including setting, specific population characteristics, and program capacity, among other factors. *Careful tailoring to the program context, refinement through CQI, and research and evaluation are necessary to fully refine and test any specific strategy noted within this guide.*

> **Because the SIMR project has not tested the effectiveness of these strategies, it is important to note that there is no guarantee that any particular strategy or set of strategies will address a challenge or improve a program. Programs need to further test and refine any solution through the program's ongoing CQI or evaluation efforts. In addition, these are general strategies. Programs will need to vet and refine them before implementation based on the program's context and the people it serves.**

Box 1: The goals and approach of the SIMR project

The Strengthening the Implementation of Marriage and Relationship Programs (SIMR) project intends to strengthen the capacity of HMRE grantees to help the youth and adult populations these grantees serve. SIMR helps HMRE grantees address implementation challenges in three core areas:

1. **Recruitment.** Challenges related to identifying and communicating with potential participants, as well as enrolling them in the program.
2. **Retention.** Challenges with initial and sustained participation in program services.
3. **Content engagement.** Challenges related to sustaining participants' interest and attention during activities and services.

In SIMR, Mathematica and its partner, Public Strategies, are collaborating with 10 HMRE grantees (5 that serve adults and 5 that serve youth) to conduct iterative, rapid-cycle testing (which is a method commonly used to test solutions using a CQI framework) aimed at strengthening grantees' services. These grantees are funded by the Office of Family Assistance within the Administration for Children and Families from 2020–2025. Through this work, the SIMR team will cocreate, test, and refine promising strategies to address recruitment, retention, and content engagement challenges. SIMR has two main goals: (1) to improve the service delivery of these grantees and (2) to develop lessons for the broader HMRE field about promising practices for addressing common implementation challenges.

The first phase of the SIMR project (September 2020 to September 2021) focused on identifying implementation challenges, developing innovative strategies to address them, and planning for rapid-cycle learning. In the second phase (October 2021 to September 2022), SIMR is focusing on conducting iterative, rapid-cycle learning to strengthen grantee programs and assess the success of program improvement strategies. These learning cycles typically last one to three months. At the end of each cycle, the SIMR team will meet with grantee staff to assess the strategy and determine how to refine it for future learning cycles, or pivot to address other emerging challenges. For more information on SIMR and the grantees, please see Developing Strategies to Address Implementation Challenges Facing Healthy Marriage and Relationship Education Grantees, available on the Office of Planning, Research, and Evaluation (OPRE) website (Baumgartner et al. 2022).

Box 2. Methods

To identify common challenges and strategies, the SIMR project team cast a wide net across information sources related to the HMRE field and then applied a systematic process to assess and refine a list of strategies to the most common challenges. There were several sources of information:

- Peer-reviewed journal articles
- Performance reports from the previous 2015–2020 cohort HMRE grantees
- Reports from federal evaluations of HMRE programs
- Interviews with HMRE researchers, curriculum developers, and Office of Family Assistance federal project officers
- Interactive brainstorming sessions with HMRE experts and those from adjacent fields (for example, parenting)

The study team coded the information gained from the sources above to develop emergent themes related to challenges and strategies for adult and youth programs, noting the prevalence of specific challenges and strategies within and across the sources. The study team then conducted several qualitative activities to organize and prioritize strategies, sorting the strategies into several broader approaches consisting of a suite of similar strategies. As a final step, the team held another brainstorming session with experts to vet the approaches. This process yielded a diverse and flexible set of six approaches and strategies that are relevant for a broad range of HMRE programs. For a more detailed description of methods, please see the technical appendix.

Tabs are clickable

How to use the guide

The remainder of this guide features strategies grouped into broad approaches. These **approaches** offer ways to address common implementation challenges that HMRE programs face. Each overarching approach contains a set of more specific **strategies** that programs could implement and tailor to their individual context. Table 1 provides an overview of the approaches.

This guide is a starting point for people operating or supporting HMRE programs, including program leaders, frontline staff, technical assistance providers, project officers, and evaluators. To use this guide to identify strategies for ongoing program improvement efforts, we recommend that readers use the clickable icons in the margin on the left to follow a three-step process and the seven tabs on the top right link to a specific approach. The arrow button on the bottom right will bring you back to this page. These clickable links appear throughout the main body of this guide.

Table 1. Approach names and descriptions

Deliver services virtually	Develop relationships with and between participants	Improve effectiveness of recruitment	Provide facilitators with training and support	Remove barriers to enrollment and participation	Use data to inform decisions and make program improvements	Use participant-centered strategies

Description
Deliver services virtually The goal of this approach is to develop and offer options for virtual service delivery. The strategies in this approach all leverage technology to assist with implementation challenges in all areas.
Develop relationships with and between participants This approach seeks to build relationships between staff and participants, among participants, and within the organization as a whole. The strategies focus on elements like peer relationships, establishing trust, and providing training and tools to staff on how to develop relationships.
Improve effectiveness of recruitment The goal of this approach is to improve the effectiveness of recruitment strategies to increase enrollment. The strategies aim to enhance recruiter skills and program messaging through a variety of methods.
Provide facilitators with training and support The goal of this approach is to enable facilitators to better relate to, connect with, and engage participants by improving facilitation quality. This approach is accomplished by enhancing facilitators' skill sets to help them deliver content in a way that is meaningful to the target population and allows them to connect with participants.
Remove barriers to enrollment and participation This approach focuses on addressing common barriers to enrollment and participation. The strategies focus on improving the identification of participants' needs and challenges, enhancing the types of incentives and supports that programs provide to them (for example, basic needs referrals or transportation vouchers), and increasing the flexibility of the program structure.
Use data to inform decisions and make program improvements The goal of this approach is to create tools and systems to collect and track data to inform program improvements and delivery. This approach seeks to enhance program improvement efforts through the collection and use of both quantitative and qualitative data.
Use participant-centered strategies The goal of this approach is to enhance the relevance of program content and services for participants. The approach focuses on obtaining information and guidance from participants and other interested groups and individuals (for example, community leaders) to enhance the program.

Step 1
Map specific challenges to approaches

Step 2
Explore the strategies listed under the approach to determine fit and feasibility

Step 3
Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Step 1
Map specific challenges to approaches

Use the following tables to identify:

- The implementation challenges you face
- Approaches to address these challenges.

Each table lists challenges related to recruitment, retention, or content engagement. Note that some challenges might appear in more than one table. Once you identify the approaches relevant to your challenges, proceed to Step 2. **Please note that each icon tab links to the specific approach.**

Table 2. Recruitment challenges

	Deliver services virtually	Develop relationships with and between participants	Improve effectiveness of recruitment	Provide facilitators with training and support	Remove barriers to enrollment and participation	Use data to inform decisions and make program improvements	Use participant-centered strategies
Difficulty obtaining parental consent and buy-in			✓	✓	✓	✓	✓
Difficulty partnering with schools			✓		✓	✓	✓
Difficulty recruiting men and other specific populations	✓		✓		✓	✓	✓
Difficulty screening out applicants who are not a good fit					✓	✓	
Failure to adequately address potential participants' concerns	✓	✓	✓	✓			✓
Failure to foster an environment in which participants are comfortable participating	✓	✓		✓		✓	✓
Ineffective recruitment strategies or messaging	✓		✓			✓	✓
Ineffective recruitment partnerships			✓		✓	✓	✓
Ineffective recruitment staff		✓	✓			✓	✓
Ineffective incentive structure					✓		
Lack of program name recognition in the community			✓				✓

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Table 2. Recruitment challenges

Table 2. Recruitment challenges	Deliver services virtually	Develop relationships with and between participants	Improve effectiveness of recruitment	Provide facilitators with training and support	Remove barriers to enrollment and participation	Use data to inform decisions and make program improvements	Use participant-centered strategies
Mismatch between workshop schedule and participants' availability	✓				✓	✓	✓
Participants' logistical barriers to enrollment and participation	✓		✓		✓	✓	✓
Participants are not a good fit for the program			✓				
Program doesn't appeal to population served						✓	✓
Program not tailored to the population served						✓	✓
Staff fail to make personal connections with participants		✓		✓			✓

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Table 3. Rentention challenges

Table 3. Rentention challenges	Deliver services virtually	Develop relationships with and between participants	Improve effectiveness of recruitment	Provide facilitators with training and support	Remove barriers to enrollment and participation	Use data to inform decisions and make program improvements	Use participant-centered strategies
Delivery partners lack commitment to quality						✓	
Delivery by program constrained by school schedules and resources	✓			✓			
Difficulty obtaining buy-in or consent from parents			✓	✓	✓	✓	✓
Difficulty motivating out-of-school youth to attend		✓		✓	✓		✓
Difficulty motivating participants to attend		✓	✓	✓	✓		✓
Difficulty screening out applicants who are not a good fit					✓	✓	
Facilitators have difficulty managing the classroom and moving conversations forward	✓	✓		✓			
Facilitators have difficulty connecting with and engaging participants		✓		✓			✓
Facilitators are ill equipped to meet student needs				✓			✓
Failure to foster an environment in which participants are comfortable participating	✓	✓		✓			✓
Failure to adequately address potential participants' concerns		✓	✓		✓		✓

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Table 3. Rentention challenges

Table 3. Rentention challenges	Deliver services virtually	Develop relationships with and between participants	Improve effectiveness of recruitment	Provide facilitators with training and support	Remove barriers to enrollment and participation	Use data to inform decisions and make program improvements	Use participant-centered strategies
Failure to maintain contact between sessions and build connections		✓		✓	✓		
Family and work responsibilities interfere with participants' focus	✓				✓		
Ineffective incentive structure					✓	✓	
Ineffective makeup structure				✓	✓		
Lack of youth accountability for program completion				✓			✓
Low attendance at first session	✓			✓			✓
Mismatch between workshop schedule and participants' availability	✓				✓	✓	✓
Participants' logistical barriers to enrollment and participation	✓		✓		✓	✓	✓
Participants are not a good fit for the program			✓				
Program not tailored to the population served						✓	✓
Staff fail to make personal connections with participants		✓		✓			✓

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Table 4. Content engagement challenges

Table 4. Content engagement challenges	Deliver services virtually	Develop relationships with and between participants	Improve effectiveness of recruitment	Provide facilitators with training and support	Remove barriers to enrollment and participation	Use data to inform decisions and make program improvements	Use participant-centered strategies
Delivery partners lack commitment to quality						✓	
Delivery by program constrained by school schedules and resources	✓			✓			
Facilitators have difficulty connecting with and engaging participants		✓		✓			✓
Facilitators have difficulty managing the classroom and moving conversations forward	✓			✓			
Facilitators are ill equipped to meet student needs				✓			✓
Family and work responsibilities interfere with participants' focus	✓				✓		
Failure to foster an environment in which participants are comfortable participating	✓	✓		✓			✓
Ineffective makeup structure				✓	✓		
Participants are not a good fit for the program			✓				
Program does not appeal to population served						✓	✓
Program not tailored to the population served						✓	✓
Staff fail to make personal connections with participants		✓		✓			✓

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Step 2

Explore the strategies listed under the approach to determine fit and feasibility

Use the tables below to identify specific strategies that might address the challenge(s), noting populations and implementation areas relevant to the strategy. As you review, keep in mind whether specific strategies are feasible and appropriate to implement in the near term and long term, given the program's context. **Please note that each icon tab links to the specific approach.**

Deliver services virtually

This approach aims to develop and offer options for virtual service delivery. The strategies in this approach use technology to assist with implementation challenges. Strategies focus on using social media and providing online intake and assessments to improve recruitment and enrollment. Practitioners can also explore strategies to offer virtual content to improve retention and use cell phones to encourage engagement. All strategies in this approach apply to a range of populations that programs may serve.

POTENTIAL SOLUTION

		Population served		Implementation area		
Strategy	Example	Adults	Youths	Recruitment	Retention	Content engagement
Offer online makeup sessions	Develop prerecorded sessions that a participant can view through a web browser	✓	✓		✓	
Offer online scheduling for intake and enrollment appointments	Develop an online system participants can use to self-schedule and begin enrollment paperwork	✓	✓	✓		
Offer online services to increase program appeal and participation	Develop a virtual version of your primary workshop	✓	✓	✓	✓	
Use cell phones to foster engagement in the content	Have participants use cell phones to support learning in workshop sessions	✓	✓			✓
Use social media or online advertising to recruit participants	Develop ads and consult with marketing experts to reach your service population on popular social media platforms	✓	✓	✓		

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Develop relationships with and between participants

This approach seeks to build relationships between staff and participants, among participants, and within the organization as a whole. Several strategies focus on fostering peer relationships through positive group dynamics and peer learning. Other strategies focus on developing relationships between program staff and participants. This approach suggests ways to establish processes and trainings for building and nurturing those relationships. Strategies also focus on establishing a safe and welcoming environment to enable participants to forge a trusting relationship with the organization operating the HMRE program. Many of the strategies in this approach apply to all populations served and address all implementation areas.

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Contact participants before the first session to begin establishing a relationship	Develop a process for staff to contact participants before the workshop starts	✓			✓	
Create a process for building relationships during recruitment and intake	Develop a procedure that emphasizes relationship building during enrollment	✓		✓		
Create a plan for reminding and following up with participants to help develop relationships with them	Develop a text-messaging procedure that asks participants questions and gives simple reminders	✓	✓		✓	
Encourage peer learning during program sessions	Use prior or current participants to help teach specific lessons or lead small-group discussions	✓	✓		✓	✓
Foster relationships between participants to promote social connectedness and community engagement	Dedicate time before the start of a session for socialization	✓	✓		✓	✓

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Develop relationships with and between participants

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Contact participants before the first session to begin establishing a relationship	Develop a process for staff to contact participants before the workshop starts	✓			✓	
Create a process for building relationships during recruitment and intake	Develop a procedure that emphasizes relationship building during enrollment	✓		✓		
Create a plan for reminding and following up with participants to help develop relationships with them	Develop a text-messaging procedure that asks participants questions and gives simple reminders	✓	✓		✓	
Encourage peer learning during program sessions	Use prior or current participants to help teach specific lessons or lead small-group discussions	✓	✓		✓	✓
Foster relationships between participants to promote social connectedness and community engagement	Dedicate time before the start of a session for socialization	✓	✓		✓	✓

Step 1
Map specific challenges to approaches

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Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Improve effectiveness of recruitment

This approach seeks to build relationships between staff and participants, among participants, and within the organization as a whole. Several strategies focus on fostering peer relationships through positive group dynamics and peer learning. Other strategies focus on developing relationships between program staff and participants. This approach suggests ways to establish processes and trainings for building and nurturing those relationships. Strategies also focus on establishing a safe and welcoming environment to enable participants to forge a trusting relationship with the organization operating the HMRE program. Many of the strategies in this approach apply to all populations served and address all implementation areas.

POTENTIAL SOLUTION

		Population served		Implementation area		
Strategy	Example	Adults	Youths	Recruitment	Retention	Content engagement
Develop methods to engage both members of a couple	Develop procedures for contacting the partner of a potential participant	✓		✓	✓	✓
Diversify recruitment strategies to potentially reach subgroups within the population served	Use a combination of direct outreach, ads, and referrals from partners	✓	✓	✓		
Encourage and incentivize participants to recruit friends and family	Identify program champions (participants that got a lot out of the program) and provide them with materials to spread the word	✓	✓	✓	✓	✓
Engage partners serving your primary population to help develop recruitment messaging that is appealing and relevant	Review your recruitment materials with your partners	✓	✓	✓		
Engage teachers and other school staff to help recruit districts	Develop a plan to form relationships with school staff so they can help champion the program		✓	✓		

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Improve effectiveness of recruitment

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Focus recruitment messaging on program benefits for the population served	Develop messages and ads that highlight improved co-parenting or similar outcomes	✓	✓	✓	✓	
Hold program information sessions that are open to the community	Hold an open house with your partners to provide information sessions	✓		✓		
Recruit in pairs when attempting to recruit a couple	Use direct outreach messages and approach potential couples with another staff member	✓		✓		
Recruit program applicants on-site at community or partner organizations that serve your organization's primary population	Form or use partnerships that enable you to be on-site to recruit people	✓	✓	✓		
Tailor your recruitment mode and conent to increase relevance to the primary population	Hold focus groups with current participants to understand what mode and messages might work for other potential participants	✓	✓	✓		
Train partner staff to deliver recruitment messages to potential participants	Develop a partner staff training on recruiting participants	✓	✓	✓		
Train recruiters on marketing techniques and strategies to better appeal to potential participants	Provide staff with continuing education on marketing	✓	✓	✓		

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Provide facilitators with training and support

This approach aims to help facilitators better relate to, connect with, and engage participants by improving facilitation quality. The strategies in this approach intend to enhance facilitators' skills to help them deliver content in a way that is meaningful to the population served and enables them to connect with participants. The approach focuses primarily on providing facilitators with training on group or discussion management techniques. It also focuses on providing facilitators with training on service delivery approaches, such as trauma-informed service delivery. This approach can also address how programs train and supervise facilitators. For example, the training process could incorporate adult learning principles. Several strategies in this approach also relate to how facilitators communicate with and receive support from other program staff (such as promoting collaboration with case managers). All the strategies in this approach apply to all populations served. This approach mainly addresses content engagement and retention. For example, training facilitators to foster internal motivation in participants might lead participants to attend more frequently and engage with the content. Although not central to this approach, increased collaboration between facilitators and other program staff, specifically program recruiters, might also lead to improved recruitment.

POTENTIAL SOLUTION

		Population served		Implementation area		
Strategy	**Example**	**Adults**	**Youths**	**Recruitment**	**Retention**	**Content engagement**
Enhance collaboration between facilitators and other staff	Regularly hold all-staff meetings to discuss program implementation	✓	✓	✓	✓	✓
Engage teachers to assist with classroom engagement and management	Develop relationships with teachers that can support you during class		✓			✓
Have facilitators provide missed content outside of class	Develop a protocol to deliver missed content one-on-one	✓	✓		✓	
Incorporate adult learning principles and experiential techniques into facilitator training	Provide facilitators with continuing education on adult learning principles	✓	✓		✓	✓

(continued)

Provide facilitators with training and support

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Regularly observe facilitators to provide feedback on facilitation quality, fidelity to content, and quality of relationships with participants	Develop a supervision and coaching plan for facilitators	✓	✓			✓
Train facilitators on facilitation techniques that foster good discussion, engagement with content, and positive group dynamics	Provide facilitators with continuing education on discussion management or curriculum delivery	✓	✓			✓
Train facilitators on techniques for identifying and cultivating motivation for change and participation (for example, motivational interviewing)	Provide staff with continuing education on motivational interviewing	✓	✓		✓	✓
Train facilitators on techniques to foster peer relationships and learning	Train facilitators to use prior or current participants to help teach specific lessons or lead small-group discussions	✓	✓		✓	
Train facilitators on techniques to help participants understand and connect content to their lives	Provide staff with continuing education on empathy and perspective taking	✓	✓			✓

Provide facilitators with training and support

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Train facilitators to use cell phones to foster engagement with the content (for example, apps, texts, use of phones during the sessions, and so on)	Develop a process for participants to use their cell phones during class for select lessons or sessions	✓	✓			✓
Train staff in a strengths-based approach to service delivery	Provide staff with continuing education on strengths-based case management approaches	✓	✓			✓
Train staff in trauma-informed approaches to service delivery	Provide staff with continuing education on trauma-informed delivery	✓	✓			✓
Train staff on techniques for developing relationships with participants	Coach staff on developing warm and meaningful relationships with participants	✓	✓		✓	✓
Use co-facilitation to help manage sessions and model content	Develop a facilitation plan that includes two facilitators at each session	✓	✓			✓
Use reflective supervision to support facilitators emotionally	Provide supervisor with continuing education in active listening and thoughtful questioning	✓	✓			✓

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Map specific challenges to approaches

Step 2
Explore the strategies listed under the approach to determine fit and feasibility

Step 3
Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Remove barriers to enrollment and participation

This approach focuses on addressing common barriers to enrollment and participation. The strategies help identify participants' needs and challenges, enhance the types of incentives and supports that programs provide (for example, basic needs referrals or transportation vouchers), and increase the flexibility of the program structure. HMRE programs can better identify participant needs by using regular assessments and using participant and community knowledge about participant barriers and the supports needed to address them. To help reduce participation barriers, programs can provide greater flexibility in the timing, location, and format of services (for example, by offering participants in-person and virtual options), including the timing and format of makeup sessions. This approach features a range of strategies that apply to all populations served and that mainly address recruitment and retention.

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Allow options for completing and attending intake and enrollment	Allow for flexibility in completing assessments before the intake appointment, or offer a virtual intake	✓		✓		
Co-locate with other programs serving or convenient for your organization's primary population	Work with partners to host them at your location(s)	✓	✓	✓	✓	
Conduct regular participant needs assessments to identify additional barriers	Develop a plan for holding regular participant focus groups	✓	✓		✓	
Deliver follow-up messages that focus on supports and barrier reduction	Develop a procedure for using email to deliver reminders and ask about barriers to attendance	✓	✓		✓	
Find and maintain partners that can help address barriers to participation	Partner with human service providers that offer services for free or reduced prices	✓	✓		✓	

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Step 1
Map specific challenges to approaches

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Explore the strategies listed under the approach to determine fit and feasibility

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Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Remove barriers to enrollment and participation

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Have facilitators provide missed or supplemental content outside of class	Develop a plan for facilitators to deliver missed content in one-on-one sessions	✓	✓		✓	
Offer case management outside of normal business hours	Hire staff that can work flexible hours or can flex their schedules	✓			✓	✓
Offer multiple, concurrent groups as drop-ins to make up missed content	Develop a workshop schedule that features multiple workshops per week at various times	✓	✓		✓	
Offer online makeup sessions	Develop prerecorded sessions that participants can view through a web browser	✓	✓		✓	
Offer online scheduling for intake and enrollment appointments	Develop an online system participants can use to self-schedule and begin enrollment paperwork	✓		✓		
Offer online services to increase program appeal	Develop a virtual version of your primary workshop	✓	✓	✓		
Offer programming at times that align with participant schedules	Develop a workshop schedule that features multiple workshops per week at various times	✓	✓	✓		

(continued)

Step 1
Map specific challenges to approaches

Step 2
Explore the strategies listed under the approach to determine fit and feasibility

Step 3
Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Remove barriers to enrollment and participation

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Offer services in multiple locations close to the population you serve	Partner with service providers who will allow you to co-locate	✓	✓		✓	
Offer supports that map to the specific barriers of the population served	Ask participants what they need and develop supports based on their responses	✓	✓		✓	
Provide makeup content before or after class	Develop a process for facilitators to deliver makeup content 45 minutes before a session begins	✓	✓		✓	
Train all staff to deliver the curriculum to increase the ability to provide makeup sessions	Provide curriculum training to all staff members	✓	✓		✓	
Use the case manager to deliver missed content	Train case managers in the curriculum	✓			✓	
Use a mix of full-time and hourly staff to provide services on a flexible schedule	Develop a hiring plan to cover evenings and weekends	✓	✓		✓	

Step 1
Map specific challenges to approaches

Step 2
Explore the strategies listed under the approach to determine fit and feasibility

Step 3
Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Use data to inform decisions and make program improvements

This approach aims to create tools and systems to collect and track data that can improve programs and delivery. The strategies seek to enhance program improvement efforts by collecting and using quantitative and qualitative data. These data-informed efforts use data from management information systems, participants, partner organizations, program staff, and the community to help organizations understand the populations they serve and the local community; to map out processes and procedures and identify implementation challenges; and to improve service delivery and performance metrics (for example, achieving enrollment or dosage targets). Nearly all the strategies within this approach apply to all populations served and can address multiple implementation areas.

POTENTIAL SOLUTION

		Population served		Implementation area		
Strategy	Example	Adults	Youths	Recruitment	Retention	Content engagement
Collect data on community characteristics and participant needs and satisfaction to improve program relevance to the population served	Use a local evaluator to conduct a needs and descriptive assessment	✓	✓	✓	✓	✓
Conduct regular participant needs assessments and use results to align services to the target population	Develop a process to hold regular participant listening sessions	✓	✓		✓	✓
Leverage community or participant knowledge to align the program with the target population	Hold a forum with community partners to understand participant needs	✓	✓	✓	✓	✓
Use data to assess and refine incentive policies and procedures	Use attendance data to understand attendance drop-off points and align incentives accordingly	✓	✓	✓	✓	

(continued)

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Step 1
Map specific challenges to approaches

Step 2
Explore the strategies listed under the approach to determine fit and feasibility

Step 3
Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Use data to inform decisions and make program improvements

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Use data to assess alignment between program and participants' schedules	Use attendance data to understand attendance drop-off points and revise workshop schedules accordingly	✓	✓	✓	✓	
Use data to assess partnership quality	Use service contact data to understand uptake of partner-provided services	✓	✓	✓	✓	✓
Use data to monitor and refine screening and enrollment procedures to re-duce burden on potential participants	Use intake data to understand how long enrollment takes and revise procedures accordingly	✓		✓		
Use program data to set and track progress toward attendance goals	Monitor monthly progress toward benchmarks and adjust accordingly	✓	✓		✓	
Use recruitment and enrollment data to assess and adapt recruitment strategies to increase enrollment	Monitor the number of enrollments you get from specific efforts to determine your return on investment	✓	✓	✓		

Use participant-centered strategies

This approach concentrates on enhancing the relevance of program content and services for participants. The strategies in this approach focus on obtaining information and guidance from participants and other interested groups and individuals (for example, community leaders) to enhance the program. These strategies aim to help programs use feedback from participants to inform everything from who they partner with to the services and supports they provide. Several strategies also focus on training staff on service delivery approaches that promote participant-centered delivery (for example, trauma-informed delivery or recognizing implicit bias). The approach also attempts to clarify allowable adaptations to and tailoring of curriculum content. Appropriate tailoring of curriculum content as part of this approach does not include substantial curriculum revisions, which would require major research and extensive work with the developer. Instead, programs implementing this approach would use an existing curriculum to identify preapproved spots where adaptation is acceptable and work with staff to tailor the content to participants. All the strategies in this approach apply to all populations served. In addition, the approach is relevant to all implementation areas.

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Assess whether curriculum content is appealing and relevant to the population served	Hold focus groups with participants to understand what resonated with them	✓	✓			✓
Conduct regular participant needs assessments and use results to align services to the target population	Develop a process to hold regular participant listening sessions	✓	✓		✓	
Develop and maintain recruitment partnerships with other organizations that serve your organization's primary population	Develop a process for identifying and prioritizing potential partners that serve the same population your organization serves	✓	✓	✓		
Focus recruitment messaging on program benefits for the population served	Develop messages and ads that highlight improved co-parenting or similar outcomes	✓	✓	✓		

(continued)

Step 1
Map specific challenges to approaches

Step 2
Explore the strategies listed under the approach to determine fit and feasibility

Step 3
Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Use participant-centered strategies

POTENTIAL SOLUTION

Strategy	Example	Population served: Adults	Population served: Youths	Implementation area: Recruitment	Implementation area: Retention	Implementation area: Content engagement
Integrate programs within organizations or programs serving the same population as your organization	Partner with service providers who will allow you to co-locate	✓	✓		✓	✓
Leverage community or participant knowledge to align the program with the target population	Hold a forum with community partners to understand participant needs	✓	✓	✓	✓	✓
Make cultural adaptations to program content, services, and activities	Use findings from needs assessment to tailor program content	✓	✓			✓
Provide staff with training on participant perspectives	Provide continuing education on implicit bias, discrimination, and equity	✓	✓	✓		
Tailor recruitment mode and content to increase relevance to the population served	Use needs assessment or other data to craft text messages to participants	✓	✓	✓		
Train staff in a strengths-based approach to service delivery	Provide staff with continuing education on strengths-based case management approaches	✓	✓			✓
Train staff in trauma-informed approaches to service delivery	Provide staff with continuing education on trauma-informed delivery	✓	✓			✓
Train staff on how to identify and address participant needs	Provide staff with training on specific assessments designed to identify a variety of participants needs or barriers	✓	✓		✓	

Step 1
Map specific challenges to approaches

Step 2
Explore the strategies listed under the approach to determine fit and feasibility

Step 3
Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Step 3

Refine the strategy and develop an implementation plan that details how the program will use and test the strategy

Remember that this guide is only a starting point. The strategies listed in each approach are intentionally general and require work to adapt them to the context of the population a program serves and to test them as part of program improvement or CQI efforts. Using the CQI resources here, we recommend that HMRE practitioners do the following to adapt and test their identified strategies:

Identify a list of potential strategies from this guide to prioritize and refine with program staff.

Use this guide to identify potential strategies that might address your challenge(s). We recommend taking these strategies to your staff and asking them to identify what might be more or less feasbile to implement. Then, work with your staff to identify various contextual factors (for example, characteristics of your participants or supervision structure) that might influence your implementation of specific strategies. Use these discussions to guide modifications and refinements to the strategies, and select the best one(s) to implement. It might be beneficial to consult your technical assistance providers to help with this step.

Develop strategy-specific materials

Once you have selected and refined a strategy or set of strategies, you will need to develop materials to implement it properly (for example, manuals, guides, training videos, and so on). In addition, you might want to develop a plan for implementing the strategy. For example, you might develop a plan that specifies who will implement the strategy and when they will do it. It might be beneficial to consult your technical assistance providers to help with this step.

Use the CQI process to test the strategy

Before implementing your strategy, you should create a plan to gauge its success through the CQI process. For example, you might want to specify what should change as a result of implementing a strategy and how you might measure that change. It might be beneficial to consult your technical assistance providers or local evaluator to help with this step. The resources noted in the link above can provide you with tools, tips, and best practices to help guide your efforts.

Implement, test, and refine

After completing all of the above, begin implementing, testing, and continually refining until you address your challenge.

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Technical appendix

To identify the past and present challenges in HMRE programs, we gathered existing information from three data sources and followed a process of deductive and inductive coding, which led to a final list of challenges and strategies (see Exhibit A1).

Gathering data sources

Reviewing peer-reviewed literature and HMRE reports

To gather relevant peer-reviewed literature, we took a three-pronged approach by (1) searching the peer review literature, (2) examining citations in seminal articles to locate additional articles not included in initial database searches, and (3) obtaining HMRE reports and briefs from federal studies.

In consultation with Mathematica library services, we searched six databases for peer-review literature published between 2010 and 2019 on HMRE or adjacent fields. We used key words such as “implementation,” “recruitment,” “retention,” “engagement,” “curriculum,” and “relationship education.”

We screened article abstracts to determine whether each study was: (1) implemented in the United States, (2) written in English, and (3) related to HMRE programming or an adjacent field with a focus on one or more of the target populations. Articles that met these criteria were sorted by target population. Through this process, we screened 495 articles to identify 90 that met the screening criteria.

We also examined the citations from three articles written by known experts. This included an article that was published outside the date range used in the search specifications (Stanley et al. 2020) and two articles from the original search (Harcourt, et al. 2017; Hawkins et al. 2017). This secondary search identified 14 additional peer-reviewed articles. In addition to peer-review literature, we reviewed 10 implementation reports, briefs, and internal memos focused on large-scale HMRE studies. We identified 114 articles to undergo a thorough review. Exhibit A2 shows the results from our searches and screening process. A full list of references is provided at the end of the technical appendix.

Reviewing performance data

We reviewed performance reports for 45 current HMRE grantees. These included HMRE grantees’ 2019 annual performance progress reports (PPRs) and the summary spreadsheet from the Office of Family Assistance (OFA) CAPstone review for the grantees. We also reviewed data from the Public Strategies technical assistance database tracking system, FastTRAC, on 25 grantees that requested technical assistance from Public Strategies. The FastTRAC data included more detailed information about the technical assistance provided to support grantees with various implementation challenges.

Exhibit A1. Overview of review and analysis process

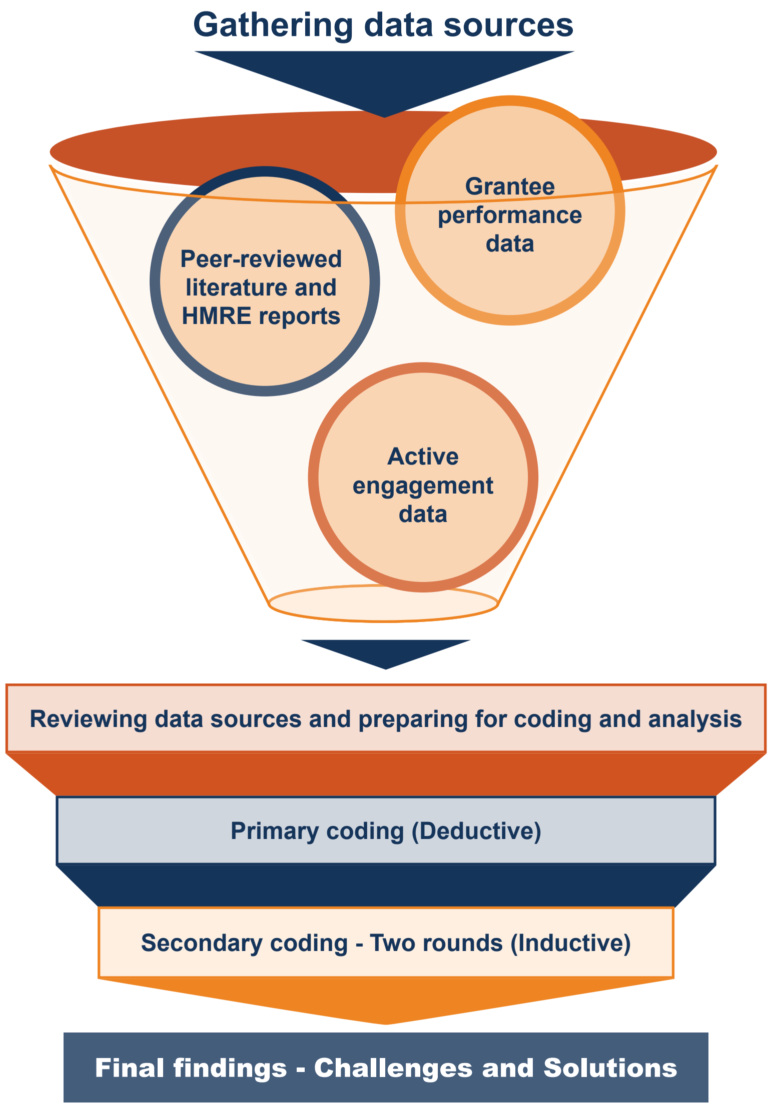
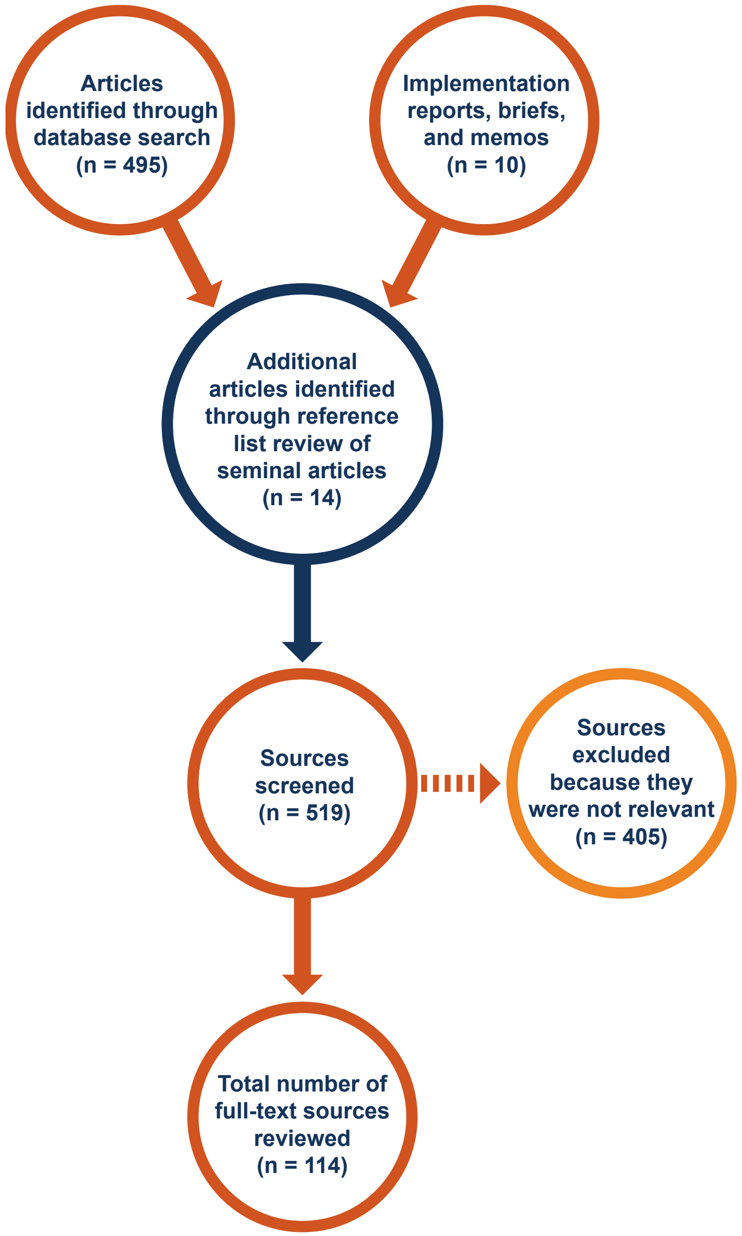


Exhibit A2. Literature review screening: flow chart



Active engagement of key groups and individuals

The study team engaged HMRE researchers and practitioners (including many from the current OFA-funded cohort), and experts from adjacent fields such as fatherhood, parenting, and youth and adolescent development (Exhibit A3). We conducted two kinds of activities: (1) a series of three webinars to identify challenges and their associated drivers or root causes, and (2) a virtual meeting of experts to identify promising strategies. We used interactive, human-centered design techniques to generate ideas during both engagements.

We convened a webinar on root causes of implementation challenges for each population (that is, adult couples, adult individuals, and youth) in January 2020 and invited HMRE experts specializing in that population. See Exhibit A4 for the most commonly reviewed challenges that were discussed.

We also held virtual meetings with experts in March 2020, where we engaged two groups: curriculum developers and family assistance program specialists (FPSs) at OFA. The curriculum developers engaged in a series of individual telephone interviews, primarily to discuss strategies to retention and engagement challenges. We also briefly discussed strategies to recruitment challenges if the developer had knowledge of these. The FPSs participated in a virtual focus group to discuss recruitment, retention, and engagement challenges. FPSs identified challenges most prevalent for their grantees and shared root causes and any associated strategies grantees have implemented or were considering implementing in 2019–2020.

Exhibit A3. List of experts and affiliations participating in SIMR activities

Expert	Affiliation
Francesca Adler-Baeder	Auburn University
Becky Antle	University of Louisville
Tricia Bent-Goodley	Howard University
Ryan Carlson	University of South Carolina
Ed Davies	Children's Home and Aid
Brian Doss	University of Miami
David DuBois	University of Illinois-Chicago
Gregg Johnson	More Than Conquerors, Inc.
Alicia La Hoz	Family Bridges
Cynthia MacDuff	Family Service Agency
Ruben Para-Cardona	University of Texas-Austin
Jackie Parker	Strong Families, Strong Wyoming
Norma Perez-Brena	Texas State University
Galena Rhoades	University of Denver
Ani Yazedijan	Illinois State University

Exhibit A4. Challenges discussed in the root cause webinars

Implementation area	Challenge
Recruitment	
Adult couples	• Recruiting both members of the couple • Cumbersome or disjointed recruiting process (outreach, screening, intake, enrollment)
Adult individuals	• Recruiting men • Tailoring recruitment to the target population
Youth	• Recruiting out-of-school youth • Developing referral and service partnerships
Retention	
All groups	• Addressing participants' barriers to participation (for example, conflicting work schedules, child care, transportation) • Delivering make-up sessions and content
Engagement	
Adult couples and individuals	• Maintaining participants' interest and demonstrating the value of the program for their lives • Delivering poor quality services
Youth	• Dealing with school-related or participant-driven disruptions • Maintaining participants' interest and demonstrating the value of the program for their lives

Coding of identified data sources and analysis of themes

Once all of the information was gathered from the literature, performance data, and key groups and individuals, we underwent a two-stage coding process to identify key themes. Ultimately through this coding process, we documented 49 challenges to recruiting, retaining, and engaging participants for programs serving youth, adult individuals, and adult couples.

Primary coding

For the 114 peer-review articles and HMRE reports, the study team extracted information from each article or report using a standardized extraction template. The information extracted from each source broadly included: (1) target population; (2) participant characteristics; (3) curriculum name; (4) study setting; (5) implementation research questions; and (6) challenges and strategies related to recruitment, retention, and engagement. The project task leads reviewed about 10 percent of the completed reviews for accuracy and completeness.

The study team adapted the standardized template from the literature review to extract information from the CAPstone review spreadsheet, FastTRAC data, and grantee performance progress reports (PPRs). Project task leads reviewed about 10 percent of all the completed reviews for accuracy and completeness.

Following each virtual activity with the experts and interested groups and individuals, we developed detailed memos to document the specific challenges and strategies discussed. We used four summary memos from the expert webinars, eight memos from the curriculum developer interviews, and one memo from the FPS focus group for the secondary coding discussed below.

To prepare both kinds of templates for analysis, we loaded all of the completed extraction templates into NVivo 12, a qualitative analysis software package. We applied a set of deductive (predetermined) codes organized according to the key fields in the review templates such as recruitment challenges and strategies, retention challenges and strategies, and engagement challenges and strategies; youth, adult individuals, and adult couples; and so on. This coding approach ensured alignment between primary coding for the literature and the grantee performance reviews. After completing primary coding, we ran reports in NVivo to produce aggregated output on a code within a population, but across sources. For example, we looked at the output for "recruitment challenges and strategies" for adult couples across all data sources.[1]

Secondary coding

Following the primary coding, we conducted secondary, or analytic, coding to identify emergent themes and patterns in the data. We used a method of coding called constant comparative analysis (Lewis-Beck et al. 2004[2]), which is an inductive qualitative coding method, meaning that the codes or themes "bubble up" from the data and are then compared with existing data or other identified codes. We conducted two rounds of analytic coding for all the data sources to summarize the implementation challenges and strategies.

[1] We did not conduct primary coding on the expert and groups/individuals data because those summary memos were already thematically organized by challenges and strategies, target population, and implementation areas.

[2] Lewis-Beck, M. S., Bryman, A., & Futing Liao, T. (2004). The SAGE encyclopedia of social science research methods (Vols. 1-0). Thousand Oaks, CA: Sage Publications, Inc.

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For the peer-reviewed literature and reports, we applied inductive codes on emergent themes for specific populations (youth, adult individuals, and adult couples) and implementation areas. In the first round of secondary coding, we developed broad thematic codes, and we coded the text using codes such as “staffing,” “target population,” or “technology,” and characterized the text as a “challenge” or “strategy.” Next, we applied the codes that emerged in the analytic coding of the literature and reports to the grantee performance reviews. The second round of analytic coding for the peer-reviewed literature, federal reports, and grantee performance data involved refining the codes through an additional cycle of inductive coding using the same constant comparative method. The goal of the second round was to distill the data into more specific and descriptive “core challenges” or “core strategies.” This round involved looking within and across the first round of emergent themes to cluster specific findings together tightly under more specific thematic labels.

We used summary memos from active engagements and the virtual expert meeting for the first round of analytic coding. We coded the summaries using the constant comparative method to identify and organize emergent themes into in Excel files. For the active engagement data, we confirmed that the identified challenges and strategies matched our emergent findings from the rest of the review. We applied the more specific codes from the second round of analytic coding to these active engagement data and allowed for additional inductive codes to emerge.

Process for prioritizing the strategies

After identifying the common core challenges and strategies across the three data sources, we used a six-step prioritization process that build on the themes identified through this prior work. The process focused on building group consensus and confirmation to map strategies to a set of high priority challenges and develop a set of approaches. Exhibit A5 illustrates the steps of the process, which we describe below.

Exhibit A5. Steps in prioritization process

STEP 1 Map strategies to challenges

Mapping the strategies to challenges helped us consider how strategies may be clustered to address a common challenge, which was useful for a subsequent step in the process to group strategies. Two teams independently mapped strategies to the common challenges using a prioritization rubric. We asked team members to take a broad view of each strategy’s potential to address the challenge, considering whether the strategy could be effective on its own, with refinements, or in conjunction with other strategies.

Nearly all strategies (98 percent) mapped to more than one challenge within an implementation area. For this reason, project leadership decided not to remove any strategies based on this indicator. More than half (59 percent) of the strategies were applicable to more than one implementation area. In most cases, the strategies that applied to only one implementation area were explicitly targeted to that area. Most strategies were applicable to more than one of the three target populations (youth, adult individuals, adult couples). Only about one-third were relevant to just one target population. For examples, some strategies were specific to challenges faced by programs serving youth, such as working with schools or getting parental buy-in for their child’s participation. Because these implementation challenges were highly relevant for these particular target populations, the team did not exclude population-specific strategies.

STEP 2 Assess evidence

We used findings from the coding and analysis to characterize the extent of evidence on how promising each strategy was. To accomplish this assessment, we reviewed the literature we gathered and documented whether each strategy was mentioned by any sources in the literature review and whether that literature was from research on HMRE programming or an adjacent field in the rubric. We also documented whether each strategy was mentioned by the FPSs, experts, or curriculum developers. The project leadership team reviewed this assessment and did not identify any strategies to drop. Most strategies (70 percent) were mentioned by more than one of the data sources. Due to the overlap in sources and the lack of rigorous evidence of strategy effectiveness, we did not eliminate any strategies based on this criterion.

STEP 3 Consider RCL suitability

Two members from the Mathematica leadership team independently reviewed the suitability of testing each strategy using rapid-learning cycles (RLC), applying two criteria: feasibility (for example, whether these designs could be implemented within the 12- to 18-month time frame for SIMR) and value (for example, whether the results of the RLCs would be of value to the larger HMRE field by considering the usefulness of results to HMRE practitioners or researchers).

Each team member noted strategies that were not suitable for RLCs and provided a brief rationale. Then, the team met to compare results and resolve discrepancies to finalize the recommendations. The team found that many strategies were suitable for RLCs. We rated 27 percent of strategies as not suitable for RLCs and subsequently removed those strategies.

STEP 4 Cluster strategies

Next, the teams worked to group strategies into clusters, each representing a distinct approach to addressing implementation challenges faced by HMRE programs. Through this process, we aimed to develop 8 to 10 approaches, each containing a set of strategies relevant to that approach. First, using constant comparative analysis (Lewis-Black et al. 2004), each team member worked individually to group strategies into primary and secondary clusters. For example, a coder might decide to assign the theme "using partnerships effectively" to all strategies related to how programs could strengthen partnerships to address recruitment, retention, and engagement challenges. Coders also identified secondary clusters for each strategy, if applicable, to capture strategies that cut across more than one theme. For example, strategies clustered under the theme "using partnerships effectively" could also relate to a cluster on "improving recruitment effectiveness."

Second, project leadership reviewed the clusters identified by the team members to identify commonalities. Leadership refined the clusters through an iterative process, which involved reducing duplication of strategies across clusters, consolidating similar strategies, dropping strategies that were overly broad (for example, "train all staff on retention strategies") or not aligned to the cluster, and turned the thematic labels into the named approaches. Ultimately, we developed 9 approaches with 5 to 15 strategies per approach.

STEP 5 Obtain expert feedback

We conducted three webinars to obtain expert input on the approaches and associated strategies developed in Step 4. We held these webinars in June 2020 and invited HMRE and adjacent field experts, whom we grouped by expertise in a specific target population. Before the webinars, we sent the experts a memo containing the approaches and associated strategies, as well as a list of questions for discussion. During the webinars, participants ranked their top five approaches and briefly discussed their rationale. Experts then discussed the group's most highly ranked approaches.

STEP 6 Finalize approaches and strategies

Following the expert meetings, the project leadership team met to review the input from the experts. As a group, the team carefully considered expert input and used it to further winnow and refine the approaches and associated strategies.

Overall, the experts found the approaches and the strategies contained within each approach to be comprehensive and a valid means to address implementation challenges. The three expert groups gave similar rankings for the priority approaches. Four approaches—using data to inform decisions, developing relationships with and among participants, taking a participant-centered approach, and providing facilitator training—were ranked in the top five by all three groups. Two other approaches—removing barriers and delivering content virtually—were ranked in the top five by one or two of the three groups. We recommend retaining the six approaches that were ranked in the top five by at least one of the expert groups.

Although none of the groups ranked enhancing recruitment effectiveness in their top five approaches, we recommend retaining this approach on our priority list. Based on our experience, grantees in federal summative evaluations often struggle with recruitment. Even grantees that are not experiencing current recruitment issues may struggle to increase their numbers in order to be able to form a control group for the evaluation.

We recommend dropping two other approaches that were not highly ranked among the experts—improving participation through make-up sessions and developing and maintaining partnerships. We also found that many of the strategies within in these approaches were already included in the other approaches highly ranked by the experts. The team also used the expert feedback to further refine and wordsmith the strategies contained within each approach. This process left the seven priority approaches described in this guide and that were considered for testing as part of SIMR.

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Daniel Friend, Annie Buonaspina, Avery Hennigar, Scott Baumgartner, and Angela Valdovinos D'Angelo from Mathematica and Lauren Mattox from Public Strategies wrote this guide under contract with the Office of Planning, Research and Evaluation, ACF, DHHS (#75P00119F37045). OPRE project officer: Samantha Illangasekare and Rebecca Hjelm. Mathematica project director: Robert Wood.