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February 2023

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Conducting Rapid Cycle Learning with Healthy Marriage and Relationship Education Programs for Youth:

Findings from the Strengthening the Implementation of Marriage and Relationship Programs (SIMR) Project

SIMR
Strengthening the Implementation of Marriage and Relationship Programs

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OVERVIEW

Healthy marriage and relationship education (HMRE) services are designed to help participants build and sustain strong families. HMRE services for youth between the ages of 14 and 24 focus on preparing participants for positive, healthy relationships in adulthood and educating them about the social and emotional aspects of relationships (Alamillo et al. 2021; Simpson et al. 2018). Studies have generally found positive impacts on short-term outcomes related to youths' relationship attitudes and beliefs. To date, however, little evidence has emerged on the effects HMRE services for youth have on longer-term outcomes (Alamillo et al. 2021; Simpson et al. 2018). To achieve their intended effects, HMRE service providers might need support to address key implementation challenges related to recruitment, retention, and content engagement.

The Office of Planning, Research, and Evaluation (OPRE) in the Administration for Children and Families (ACF), with funding from the Office of Family Assistance (OFA), contracted with Mathematica and its partner, Public Strategies, to conduct the Strengthening the Implementation of Marriage and Relationship Programs (SIMR) project. This project aims to identify key implementation challenges facing HMRE grant recipients and, in close collaboration with HMRE grant recipients and their staff, develop and test strategies to address those challenges using rapid cycle learning techniques. This report shares lessons and insights from the testing phase of the project, focusing on the five youth-serving HMRE grant recipients that participated in SIMR.

Purpose

In the SIMR project, Mathematica and its partner, Public Strategies, collaborated with 10 HMRE grant recipients—five youth-serving grant recipients and five adult-serving grant recipients—to conduct iterative rapid cycle testing aimed at strengthening their services. SIMR focused on common implementation challenges related to recruitment, retention, and content engagement.

Common implementation challenges facing HMRE grant recipients

The SIMR team conducted a review of peer-reviewed literature, grant recipients' performance data, and reports on federal studies, and held discussions with federal staff and HMRE experts and stakeholders to identify common implementation challenges related to recruiting and retaining participants and developing engaging content for adult- and youth-serving grant recipients.

- **Recruitment challenges** included ineffective recruitment partnerships, ineffective recruitment strategies or marketing, services that did not appeal to potential participants or address their concerns, and participants' logistical barriers to enrollment. For grant recipients serving youth in schools, recruitment challenges include getting parents' buy-in and developing relationships with schools.
- **Retention challenges** included participants' barriers to participation, difficulty motivating participants to attend, and ineffective structures for incentives and make-up sessions. For grant recipients serving youth in schools, disruptions in school schedules, lack of parental buy-in, and lack of accountability (such as grades) for participation contributed to retention challenges.
- **Content engagement challenges** included not tailoring the content to the service population, facilitators' difficulty connecting with and engaging participants, and facilitators' difficulty managing disruptions in the group workshop and moving conversations forward.

SIMR had two main goals:

1. to improve the service delivery of these grant recipients
2. to develop lessons for the broader HMRE field about promising practices for addressing common implementation challenges

This report describes the rapid cycle learning process and findings for the five youth-serving HMRE grant recipients that participated in SIMR (Table 1). It shares how each grant recipient addressed implementation challenges and improved services through participation in SIMR and insights that can help other HMRE grant recipients strengthen their own service delivery. A companion report (Friend et al. 2023) shares findings related to the five adult-serving HMRE grant recipients in SIMR.

Table 1. Youth-serving HMRE grant recipients participating in SIMR

Grant recipient name	Location	Service population	Strategies developed and tested	Number of learning cycles completed
Auburn University Youth Relationship Education Program	Auburn, Alabama	Youth in high schools across Alabama	Support HMRE facilitators to identify and manage sources of stress	2
More than Conquerors, Inc.	Conyers, Georgia	Youth in high schools in suburban Atlanta	Conduct case management with youth in high schools	2
Texas A&M University Agrilife Extension	College Station, Texas	Youth ages 18 to 24 in the Brazos Valley of Texas	Recruit youth in rural areas	2
MotherWise	Denver, Colorado	Pregnant and parenting young women ages 14 to 24, most of whom are Hispanic	Use technology to build community and engage participants in virtual services	3
Youth & Family Services	Rapid City, South Dakota	High-school-age youth in a variety of settings, both in and out of school	Support facilitators through planning and debriefing strategies	4

Key Findings and Highlights

In SIMR, each grant recipient developed and tested improvement strategies tailored to their specific needs, service populations, and individual contexts, using an approach to program improvement and rapid cycle learning known as Learn, Innovate, Improve (LI^2). Through their work with the SIMR team, grant recipients:

- **Addressed pressing implementation challenges:** One grant recipient focused on improving recruitment and four focused on topics related to improving content engagement.
- **Increased their capacity to collect and use data to inform decision-making:** Through rapid cycle learning, grant recipient staff administered feedback surveys to participants, tracked recruitment data, and analyzed social media analytics. They reviewed these data with the SIMR team and developed insights to refine their improvement strategies.

- **Developed skills for identifying and responding to emerging implementation challenges:** At the end of each learning cycle, the SIMR team met with grant recipients to review and interpret data and determine next steps. When new challenges emerged, grant recipients were able to pivot to address them in later learning cycles.
- **Strengthened capacity and developed tools and strategies to support strong implementation through the rest of the grant period:** Grant recipients developed promising tools and strategies to support facilitators, enhance case management, recruit youth from rural areas, and encourage participant relationships. At the end of SIMR, the grant recipients planned to continue using these tools and strategies.

Methods

Grant recipients and the SIMR team used the LI^2 framework to guide rapid cycle learning. LI^2 is an analytic and evidence-based approach to managing program improvement (Derr et al. 2017). Throughout the three phases of LI^2, researchers collaborate with practitioners to identify the root causes of a challenge (Learn); create innovative program improvement strategies that are participant-centered, informed by science, and sustainable (Innovate); and use rapid cycle learning methods to test and refine strategies (Improve). This report focuses on the Improve phase. For more information on the Learn and Innovate phases, see the report, *Developing Strategies to Address Implementation Challenges Facing Healthy Marriage and Relationship Education Grantees* (Baumgartner et al. 2022).

In the Improve phase in SIMR, youth-serving grant recipients conducted between two and four learning cycles. They collected different types of data to assess the success of the strategies they were testing, including interviews, focus groups, and surveys of staff and participants, workshop observations, program data, and data from nFORM (Information, Family Outcomes, Reporting, and Management), the management information system sponsored by ACF that grant recipients use to record participants' characteristics and participation in services, monitor service use, and make decisions that are informed by data.

Recommendations

Through their collaboration as part of SIMR rapid cycle learning, the SIMR team and the five READY4Life grant recipients that participated generated insights and lessons to inform strong service delivery that are relevant to other HMRE grant recipients. The tools and strategies that grant recipients developed provide starting points for other organizations that want to strengthen their own HMRE services. Grant recipients interested in adopting any strategies presented in this report can do so using a continuous quality improvement (CQI) process to adapt the strategy to their specific context and then iteratively test it on a small scale to refine the strategy design and implementation:

- **Provide supports and tools for facilitators to successfully lead HMRE workshops,** such as strategies to manage sources of stress and plan and debrief lessons.
- **Look for innovative ways to reinforce workshop content,** such as by engaging participants with curriculum content on social media and helping youth set and make progress on goals through case management.
- **Prioritize relationship-building to engage participants,** by establishing a safe and supportive classroom environment and using technology in intentional, innovative ways.

CHAPTER 1

INTRODUCTION

Healthy marriage and relationship education (HMRE) services are designed to help participants build and sustain strong families. In recent years, the federal government has offered funding for HMRE programs to encourage the formation of healthy relationships and stable, families. The grants support programs for couples, individual adults, and youth.

HMRE services for youth between the ages of 14 and 24 focus on preparing participants for positive, healthy relationships in adulthood and educating them about the social and emotional aspects of relationships (Alamillo et al. 2021; Simpson et al. 2018). Studies have generally found positive impacts on short-term outcomes related to youths' attitudes and beliefs. To date, however, little evidence has emerged on the effects HMRE services for youth have on longer-term outcomes (Alamillo et al. 2021; Simpson et al. 2018). Recent publications taking stock of progress in the HMRE field underline the need for more research and support for well-run, youth-serving HMRE services in order for them to achieve their intended effects (Alamillo et al. 2021; Scott et al. 2017; Alamillo and Ouellette 2021). In particular, HMRE service providers might need support to address challenges related to recruitment, retention, and content engagement to ensure participants can access and learn from curriculum content (Friend et al. 2022). These challenges limit the ability of researchers to study whether and how HMRE services improve outcomes for youth.

To strengthen the capacity of HMRE grant recipients to help the populations they serve, the Office of Planning, Research, and Evaluation (OPRE) in the Administration for Children and Families (ACF), with funding from the Office of Family Assistance, has contracted with Mathematica and its partner, Public Strategies, to conduct the Strengthening the Implementation of Marriage and Relationship Programs (SIMR) project. This project aims to identify key implementation challenges facing HMRE grant recipients and, in close collaboration with HMRE grant recipients and their staff, develop and test strategies to address those challenges using rapid cycle learning techniques. An earlier report (Baumgartner et al. 2022) describes how grant recipients identified challenges and developed strategies to address them. This report shares lessons and insights from the testing phase of the project, focusing on the five youth-serving HMRE grant recipients that participated in SIMR. A companion report describes the testing phase for the five adult-serving grant recipients that participated in SIMR (Friend et al. 2023).

What are the Healthy Marriage and Responsible Fatherhood programs?

Since 2006, the Office of Family Assistance in the Administration for Children and Families, U.S. Department of Health and Human Services, has funded the Healthy Marriage and Responsible Fatherhood (HMRF) programs. The HMRF grant programs fund organizations providing healthy marriage and relationship education (HMRE) services to adult couples, adult individuals, and/or youth, under two funding opportunity announcements:

- **FRAMEWorks** grant recipients serve adult couples or individuals.
- **READY4Life** grant recipients serve youth (defined as individuals ages 14 to 24) in school or community settings.

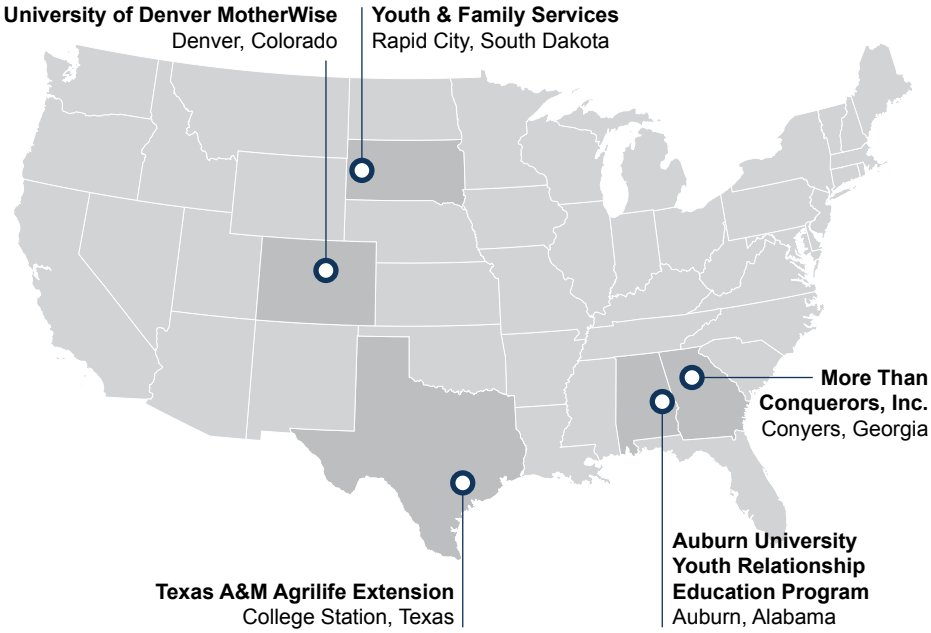
The HMRF program also funds Responsible Fatherhood grant recipients to provide services to fathers to promote healthy relationships, responsible parenting, family well-being, and economic security.

SIMR: Strengthening the Implementation of Marriage and Relationship Programs

In the SIMR project, Mathematica and its partner, Public Strategies, collaborated with 10 HMRE grant recipients to conduct iterative rapid cycle testing aimed at strengthening their services. SIMR has two main goals: (1) to improve the service delivery of these grant recipients and (2) to develop lessons for the broader HMRE field about promising practices for addressing common implementation challenges. For more information and a list of SIMR publications, visit the SIMR page on the OPRE website.

Youth-serving HMRE grant recipients participating in SIMR

Figure 1.1. Youth-serving HMRE grant recipients participating in SIMR



The SIMR team collaborated with five youth-serving grant recipients, known as READY4Life grant recipients, to use rapid cycle learning to co-create, test, and refine promising strategies to address challenges to recruitment, retention, and content engagement (Figure 1.1). During the site selection process, these grant recipients participated in interactive activities to identify their most pressing challenges and brainstorm strategies that could potentially address them. The strategies each grant recipient focused on were tailored to their specific needs, service populations, and individual contexts (Table 1.1). More information on the site selection process, the challenges grant recipients identified, and details about their services are in *Developing Strategies to Address Implementation Challenges Facing Healthy Marriage and Relationship Education Grantees* (Baumgartner et al. 2022). Grant recipients interested in adopting any strategies presented in this report can do so using a continuous quality improvement (CQI) process to adapt the strategy to their specific context and then iteratively test it on a small scale to refine the strategy design and implementation.

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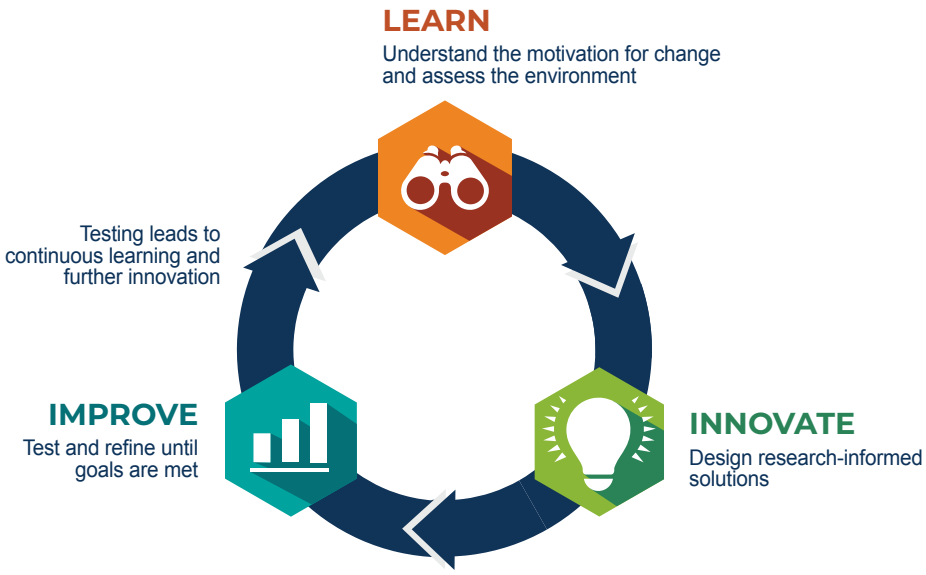
Learn, Innovate, Improve: An approach to rapid cycle learning

Grant recipients and the SIMR team used the Learn, Innovate, Improve (LI^2) framework to guide rapid cycle learning (Figure 1.2). LI^2 is an analytic and evidence-based approach to managing program improvement (Derr et al. 2017). Throughout the three phases of LI^2, researchers collaborate with practitioners to identify the root causes of a challenge (Learn); create innovative program improvement strategies that are participant-centered, informed by science, and sustainable (Innovate); and use rapid cycle learning methods to test and refine strategies (Improve).

The earlier SIMR report focused on grant recipients' activities during the Learn and Innovate phases. In the Learn phase, the SIMR team worked with participating grant recipients to systematically identify the factors contributing to the specific implementation challenge they would like to address. Our initial work with the grant recipients in the SIMR project focused on building a common understanding of each grant recipient's context and the needs and circumstances of the population the grant recipient aimed to serve. In the Innovate phase, we worked with grant recipients to develop tailored strategies directly connected to the challenges and root causes the grant recipient staff identified during the Learn phase. In regular calls with grant recipient staff, we co-developed creative strategies that built on research and best practices and on grant recipients' knowledge of their service population and unique context.

Figure 1.2. The LI² framework



This report focuses on the Improve phase. In this phase, the SIMR team and grant recipient staff collaborated to iteratively test and refine strategies using rapid cycle learning methods. Rapid cycle learning was informed by four key principles.

- **Embed strategies in program activities and context.** Each grant recipient's rapid cycle learning was customized to the strategy they were implementing and the program's context. For example, learning cycles with More Than Conquerors, Inc. lasted for a full school semester, because the grant recipient's workshops ran for 12 weeks during fall and spring school semesters.
- **Engage grant recipient staff directly in interpreting findings and refining strategies.** Throughout each learning cycle, we met with grant recipient staff to discuss progress, identify challenges and barriers, monitor data (such as weekly recruitment or retention numbers), and fine-tune the strategy as necessary. In a debrief meeting at the end of a learning cycle, the SIMR team presented data to the grant recipient staff and facilitated a discussion to engage them in interpreting the data and determining next steps. To help them choose their next steps, the team drew on techniques from other phases of the LI² process, such as identifying the root causes of a new, emerging challenge (Learn), or developing learning questions and data collection plans for another learning cycle (Innovate).
- **Iterate to refine strategies over time.** Trying out a strategy using multiple small-scale and quick turnaround steps, as described above, promotes a culture of learning and helps pinpoint challenges with a strategy early. With all grant recipients, we used at least two learning cycles to test and refine individual strategies.
- **Incorporate low-burden data collection.** We sought to make data collection a part of the strategies that grant recipients tested. Grant recipients consequently built their capacity to collect and use data to inform program improvement. For example, facilitators at Youth and Family Services developed and administered "exit tickets," quick, three-to-five question surveys, to students at the end of each workshop session to gather their feedback on how engaging they found the workshop. The facilitators used this feedback when they debriefed on the workshop series as a team.

Table 1.2. Data used in rapid cycle learning

	Staff and partners			Participants		Services and strategies		
	Interviews and focus groups	Surveys	HCD activities	Interviews and focus groups	Surveys	Observation	nFORM data	Other program data
Auburn Youth Relationship Education Program	✔	✔	✔		✔			✔
More Than Conquerors, Inc.	✔	✔	✔		✔		✔	✔
Texas A&M Agrilife	✔		✔	✔			✔	✔
MotherWise	✔	✔	✔	✔		✔		✔
Youth & Family Services	✔	✔	✔		✔		✔	✔

HCD: Human-centered design, a discipline of approaches to innovation and programmatic change that emphasizes the perspectives of people affected by the change at each stage of the design process (Liedtka et al. 2017).

In the learning cycles, grant recipient staff and the SIMR team used several sources of data to understand challenges, inform strategy design, and assess implementation and the success of the tested strategy (Table 1.2). These were:

- **Data from grant recipient and partner staff,** including interviews, surveys, and human-centered design (HCD) activities. HCD is a discipline of approaches to innovation and programmatic change that emphasizes the perspectives of people affected by the change at each stage of the design process (Liedtka et al. 2017). During the learning cycles, we used these activities to collect group feedback and solicit ideas to refine strategies for subsequent learning cycles from grant recipient staff.
- **Data from participants,** including interviews, focus groups, and grant recipient-administered surveys,
- **Data on services and strategies,** including workshop observations, nFORM data (Box 1.1), recruitment data, and other program data. Other program data included data that grant recipients collected about services and strategies. Youth & Family Services staff shared notes from facilitator debriefing meetings with the SIMR team (Chapter 6), Auburn Youth Relationship Education staff shared copies of the form they completed as a part of implementing the emotion regulation strategy they tested (Chapter 2), and More Than Conquerors, Inc. shared anonymized case notes from case management meetings with youth (Chapter 4). Both Texas A&M (Chapter 5) and the MotherWise (Chapter 3) shared social media analytics, and Texas A&M shared additional recruitment data that are not tracked in nFORM.

Between September 2021 and August 2022, youth-serving HMRE grant recipients completed between two and four iterative learning cycles (Table 1.1).

In this report, we share insights, lessons, and promising strategies from the grant recipients' rapid cycle learning. Because the SIMR team tailored the work to each individual grant recipient's needs, each chapter focuses on findings from a single grant recipient, documenting the rapid cycle learning the grant

recipient engaged in, the strategy they focused on, and how that strategy changed over the course of iterative learning cycles. At the end of each chapter, we present findings for the primary questions grant recipients sought to answer through rapid cycle learning. In a concluding chapter, we offer some cross-cutting themes, insights, and lessons. Key terms used across the chapters are shown in Box 1.1.

Box 1.1. Key terms

- **CQI**. Continuous quality improvement, a process of identifying, describing, and analyzing strengths and problems and then testing, implementing, learning from, and revising solutions.
- **Learning cycle.** One of the short, iterative testing periods involved in rapid cycle learning. Each learning cycle includes a period when grant recipient staff implement a program improvement strategy and participate in data collection, followed by a period in which grant recipient staff and researchers review data and determine changes to the strategy for the next learning cycle.
- **LI².** Learn, Innovate, Improve, the framework the SIMR team used to guide rapid cycle learning.
- **nFORM.** Information, Family Outcomes, Reporting, and Management, a management information system sponsored by ACF that grant recipients use to record participants' characteristics and participation in services, monitor service use, and make decisions that are informed by data.
- **Rapid cycle learning.** An iterative process in which data on short-term outcomes are collected and used to implement and repeatedly refine a strategy until co-created goals are met.
- **SIMR team.** Mathematica and Public Strategies staff who worked closely with grant recipient staff to develop and test program improvement strategies.
- **Youth.** The READY4Life grant defines a youth as anyone between the ages of 14 and 24. Grant recipients in SIMR focused rapid cycle learning either on services for youth in high schools (typically younger than 18) or services for older youth in community settings (typically between the ages of 18 and 24).

CHAPTER 2

SUPPORTING FACILITATORS TO IDENTIFY AND MANAGE SOURCES OF STRESS WITH AUBURN YOUTH RELATIONSHIP EDUCATION

Spotlight on: Auburn University Youth Relationship Education program (AYRE)

- HMRE grant recipient since 2006
- Serves youth in high schools in 11 counties in Alabama
- Uses *Relationships Smarts 4.0, Mind Matters,* and *Money Habitudes* in a 12-hour core workshop delivered primarily in health and family and consumer sciences classes during the school day
- Workshops are co-facilitated by pairs of near-peer or community facilitators (pairs are never mixed): *Near peers* are undergraduates enrolled at three Alabama universities and receiving college credit for participation. *Community facilitators* are established facilitators employed by local social services organizations.

For the SIMR project, the Auburn Youth Relationship Education (AYRE) program chose to test and refine Take Note, Tag It, Tune It (T3), an emotion regulation strategy geared toward helping adults notice, label, and manage their own feelings, in order to help them manage stressful situations and equip them to engage youth in workshop content. AYRE hoped that T3 would help facilitators manage stressful situations, such as returning to in-person learning or teaching a workshop for the first time, and equip them to support the development of youth self-regulation skills, a process known as co-regulation (see sidebar). To help youth develop self-regulation skills, facilitators of youth programs should practice and hone their own self-regulation—that is, their capacity to regulate their own thoughts, emotions, and behaviors. Doing so may help facilitators establish a workshop environment that encourages youth to actively engage in curriculum content and is less apt to be derailed by disruptions when they occur.

T3 was initially developed and piloted as a part of OPRE's Self-Regulation Training Approaches and Resources to Improve Staff Capacity for Implementing Marriage and Relationship Programs for Youth (SARHM) project. SIMR offered the opportunity to test T3 with facilitators in a school setting, including established facilitators and those who had no prior facilitation experience.

T3 is a three-step strategy for noticing (Take Note), labeling (Tag It), and managing feelings (Tune It). The SIMR team developed a T3 training manual for facilitators that included templates for a T3 record (Figure 2.1), which facilitators completed as they practiced

Self-regulation and co-regulation

Self-regulation is the process of coordinating one's thoughts (cognitive regulation), emotions (emotion regulation), and behaviors (behavioral regulation) to achieve one's goals. It is linked to success in many areas including relationships, education, and emotional well-being. Self-regulation develops from infancy through adulthood. Early childhood and adolescence are particularly important times for self-regulation development.

Co-regulation is the interactive process between adults and youth that integrates three key types of self-regulation support for youth: (1) creating an environment where youth feel safe to practice self-regulation skills, (2) developing warm and responsive relationships with youth, and (3) coaching and modeling self-regulation skills.

Sources: Murray et al. (2015); Frei et al. (2021); Baumgartner et al. (2020).

T3, and the Tune It toolkit (Figure 2.2), which they developed in an initial training. The steps of T3 are below and illustrated in the example in Figure 2.1:

1. **Take Note.** Notice and write down physiological sensations in the body in a T3 record.
2. **Tag It.** Assign an emotion to the sensation using a sheet of emotion words as a guide, and write any notes about their context or what might be provoking the feelings.
3. **Tune It.** If the emotion is intense, practice a strategy to manage the feeling, chosen from a pre-populated list of self-regulation strategies.

Figure 2.1. Sample T3 record

Date	Day	Time	Body sensation	Feeling word	Notes	Used toolkit? Which strategy?
10/5/21	Tuesday	7:31 am	Pressure behind my eyes, tension in forehead, back is achy	Anxious, foggy, exhausted	Late class last night and didn't sleep well, but have to teach this morning and this class gets off topic easily	Yes – focused breathing and then listened to my favorite song while drinking coffee

Through these steps, T3 enables users to practice the basic skills of emotion regulation—one of the three types of self-regulation—by increasing mind-body awareness, emotion vocabulary and emotion (or "affect") labeling, and healthy behavioral coping. Developing these skills may enable adults to better manage stressful situations and notice patterns over time. Affect labeling is an important emotion regulation skill that enables people to distance themselves from an emotion in order to process and then alter it, if necessary (Lieberman et al. 2007). This is typically an implicit process that people do not consciously think about. While little is known about how affect labeling works as a regulatory process, actively using emotion language and writing to label or categorize a physical sensation has been shown to help people regulate their emotions (Torre and Lieberman 2018).

When AYRE first started participating in SIMR in the beginning of 2021, staff were concerned about challenges related to engaging youth in curriculum content. After a year disrupted by the COVID-19 pandemic, AYRE facilitators were preparing for the full-time re-opening of schools. About half of AYRE facilitators were "near peers," undergraduate students from three Alabama universities with no prior HMRE facilitation experience. For these near peers, the prospect of facilitating for the first time and engaging youth in curriculum content, while also adjusting to COVID-19 protocols (such as social distancing, limitations on group activities, quarantines, or hybrid learning), may have seemed especially stressful. The other half of AYRE facilitators were "community facilitators," established facilitators employed by community-based organizations around the state.

In early 2021, AYRE began offering a curriculum that combined eight hours of *Relationship Smarts Plus 4.0* with three hours of *Mind Matters*, a curriculum designed to teach self-regulation skills, and one hour of *Money Habitudes*. As a part of a training that AYRE delivered, grant recipient project directors instructed facilitators to practice certain self-regulation techniques with the youth in program workshops, including mindfulness, noticing, and breathing exercises from *Mind Matters*. In addition to building their capacity to manage challenging and stressful situations, AYRE leadership hoped that T3 would help facilitators practice skills being taught in *Mind Matters*, as a way to become better at teaching and coaching these skills for youth.

Figure 2.2. T3 tune it toolkit

Tune it Toolkit

CO-REGULATION STRATEGIES FOR HMRE PROVIDERS

Think about what strategies have helped you to regain control when your feelings have taken over. What picks you up when you are down or keeps you from lashing out when you're angry? For example, you had an argument with your partner before work, and you can't get the events out of your mind. Perhaps you take five minutes to listen to song that changes your mood. When feelings hijack your focus, you can try strategies to "Tune it."

SOOTHING SENSATIONS *What might I look at, smell, taste, touch, hear, or how might I move to soothe myself?*	DISTRACTION *What can I do to distract me from or replace those emotions for a short time?*	OTHER *What strategies work to calm me when I'm stressed or to lift my mood when I'm done?*
Examples *When I feel overwhelmed, I take a quick walk outside where I can see the trees and smell the crisp air* *When I am stressed, I can light a candle. The smell is soothing.* *I put on my favorite music. I sing along, and it helps get my mind on something else.*	**Examples** *I can ask my co-worker to take a short break with me.* *Talking to friends about their day and their challenges helps me feel better about mine.* *I like to watch a short funny video on YouTube.* *Laughing can help me lift my mood.* *Coloring is a nice distraction.*	**Examples** *Sometimes I just need to repeat to myself, "I can take this. I am not dying. It won't last forever. I got this."* *Focused breathing (inhale, hold, exhale, hold) for 4 minutes really helps.* *I feel better if I splash cold water on my face.* *I can say a prayer or take a moment to meditate.*

In an earlier pilot conducted as a part of SARHM, some youth-serving HMRE facilitators from a community-based program found practicing the steps of T3 challenging (Baumgartner et al. 2021). The SIMR team hoped that staff who had participated in the *Mind Matters* training and gained previous exposure to self-regulation strategies might provide more insight into the best ways to integrate emotion regulation strategies into staff practice. The SIMR team's work with AYRE explored two learning questions, shown in the box below.

Learning questions for AYRE

1. **Does participating in training and practicing T3 increase facilitators' perceptions of their own self-regulation?** To explore this question, the SIMR team surveyed and interviewed AYRE facilitators about their emotional awareness, vocabulary, and self-efficacy related to self-regulation skills.
2. **Do students rate the facilitation quality and co-regulation of facilitators who were asked to participate in a training and practice T3 more highly than those of other facilitators who did not participate in training or practice T3?** To explore this question, the SIMR team analyzed responses to a grant recipient-administered survey that asked students to rate facilitators' quality, co-regulation behaviors, and student-facilitator relationships.

What did rapid cycle learning look like at AYRE?

The SIMR team and AYRE conducted two learning cycles together. In the first learning cycle, eight facilitators—three near peers and five community facilitators—were trained on the science of co-regulation and tried out T3 twice a week in their daily lives during the summer months when AYRE was not providing workshops in high schools. In the second learning cycle, 10 facilitators—seven near peers and three community facilitators—participated in a co-regulation training and used T3 while they were teaching workshops during the fall 2021 school semester (one of the 10, a near peer, quit midway through the semester). Two community facilitators participated in both learning cycles.

Learning Cycle 1: July–August 2021

The learning cycle was designed to answer the following question:

What is the feasibility of asking AYRE facilitators to use T3 during the fall 2021 school semester?

The purpose of the first AYRE learning cycle was to understand the feasibility of practicing T3 and refine it before using it during the school year. Of the eight facilitators who participated in the learning cycle, five submitted T3 records and one provided written feedback about their use of T3. On average, these facilitators used T3 about 19 times over the four weeks of the pilot. Use ranged from 1–2 times per week to 8–10 times per week. The six facilitators who provided feedback reported that it took them about three to five minutes to practice the steps of T3 and that it was not difficult to find time to use T3. Facilitators reported that T3 helped them identify patterns in their emotional state and pinpoint events that could be linked to the emotions they were feeling. For example, one facilitator noticed she felt dread at the same time every week, and T3 allowed her to connect this feeling to a standing weekly meeting she found stressful.

Based on the facilitator feedback from the first learning cycle, the SIMR team and AYRE determined that it would be feasible to use T3 during the school year with a larger group of facilitators, with some small changes:

- Tweaked the design of the T3 record to help facilitators recognize patterns in their emotions and to give them more space to describe their physiological sensations and emotions.
- Extended the co-regulation training from two to three hours to give facilitators more time to develop their T3 toolkits and practice using T3.
- Updated guidance for using T3, asking facilitators to use it three to four times per week, including before and after teaching workshop sessions.

Learning Cycle 1
July – August 2021

Strategy and Purpose

- **Strategy:** T3, a three-step process to help users manage stressful situations by noticing and labeling emotions and practicing an emotion-regulation strategy, if necessary.
- **Purpose:** Eight facilitators used T3 during their daily lives to test feasibility before use during the school year

Data

- T3 records (5 facilitators)
- Written feedback from facilitators (1 facilitator)

Key Takeaways

- Facilitators found T3 helpful and used it multiple times per week
- Using T3 took about 3-5 minutes, and facilitators did not have difficulty finding time to use it

Learning Cycle 2: September–November 2021

In the second AYRE learning cycle, seven near-peer facilitators and three community facilitators participated in co-regulation training. The SIMR team instructed them to use T3 while they were co-facilitating workshops during the fall 2021 school semester. Two of the community facilitators participating in the second learning cycle also had participated in the first learning cycle, but the training and the T3 strategy were new to the other seven near-peer facilitators and one community facilitator. The primary goal of the second learning cycle was to assess whether using T3 affected facilitators' practice.

The learning cycle was designed to answer the following question:

How does T3 use affect facilitators' practice?

Learning Cycle 2

September – November 2021

Strategy and Purpose

- **Strategy:** Modified T3 strategy includes updates to the T3 record to help facilitators recognize patterns in their emotions and more space to record physiological sensations and emotions, and extending training by an hour.
- **Purpose:** 10 facilitators used T3 three to four times per week during the fall 2021 school semester to assess whether T3 affected facilitation quality

Data

- Student survey (517 students)
- Facilitator interviews (5 facilitators)
- Facilitator training pre-survey (10 facilitators)
- Facilitator training post-survey (5 facilitators)

Key Takeaways

- Facilitators found the T3 training content helpful, but faced implementation challenges.
- Bayesian analysis suggested T3 contributed to improvements in facilitation quality for near-peer facilitators

Results from using T3 in the second learning cycle were mixed. Facilitators reported that the training content was useful. Facilitators reported positive perceptions of their ability to regulate their emotions on both the pre-training survey administered in September 2021 and the post-semester survey administered in December 2021 (we refer to these as the pre-survey and post-survey). Since half of the facilitators who participated in the second learning cycle did not respond to the post-survey, we cannot say with confidence whether facilitators' perceptions of their own self-regulation skills increased after they participated in training and practiced T3. On the pre- and post-surveys, facilitators recognized the importance of their own self-regulation in the classroom, but had mixed responses about the connection between self-regulation development and the HMRE curriculum topics. On both surveys, almost all facilitators agreed that "how I regulate my own thoughts, feelings, and behaviors in class makes a difference in youths' self-regulation" and almost all facilitators also agreed or strongly agreed with the statement that "my main task in this program is to assist youth on their road to adulthood." However, most facilitators were neutral on or agreed with the statement that "focusing on improving youth's self-regulation diverts attention from important class content." The tension between these different responses about the value of focusing on self-regulation suggests that facilitators could use additional support and training to integrate self-regulation instruction and skills practice into HMRE curriculum delivery.

In qualitative interviews, three of five facilitators—all of whom were near peers—reported that T3 was useful. But, while we concluded in the first learning cycle that T3 use was feasible, the facilitators who participated in the second learning cycle had difficulty practicing T3. While one noted that T3 helped her "slow down and really identify how [she was] feeling," others said that it was hard to actually slow down and use the strategy when they were "stressed and needed to calm down." Although none of the facilitators used T3 fully or consistently enough to recognize patterns in their emotions, all reported that they had used "tune it" strategies and that these strategies had helped with their facilitation. For example, one facilitator reported that facilitating often left him "buzzing with ideas." Taking the time to use T3 and practice a calming strategy like focused breathing or 5-4-3-2-1 (strategies taught in *Mind Matters*) helped him bring down his adrenaline. Half of the facilitators who participated in the second learning cycle, including all three participating community facilitators, did not respond to interview requests, so we do not know if they thought that T3 helped them manage stressful situations or improved their facilitation.

In interviews, most facilitators reported that they had practiced T3, even if they did not use the T3 record. All of the facilitators who participated in interviews noted it was hard to remember to complete the record "in the moment" of practicing T3, and one referred to the T3 record as a "chore." Therefore, the T3 practice they described typically involved only two of the three steps in the strategy. Facilitators would "take note" (Step 1, notice physical sensations) and "tune it" (Step 3, use a strategy to change their emotional state), but did not tend to "tag it," or label physical sensations with an emotion word. Instead, for example, they might notice a physiological sensation, such as a racing heart, and then practice a calming strategy without labeling the racing heart with an emotion word like "energized" or "startled." Because most facilitators did not use the T3 record, the SIMR team was unable to analyze the records to understand patterns in how facilitators practiced T3 or whether it helped them practice self-regulation skills they were teaching in Mind Matters. Facilitators' interview responses suggested that they thought T3 was a strategy to be used in times of emotional distress, rather than something to practice regularly. Facilitators estimated that they practiced T3 one to three times per week, less than asked.

To explore whether T3 use influenced facilitation behaviors, AYRE provided the SIMR team with data from a student survey the grant recipient was administering as part of its own local evaluation.[1] This survey asked students to provide feedback at the end of the workshop series on several relevant measures, including facilitation quality, quality of student-facilitator relationships, group engagement, co-facilitator relationships, and facilitator co-regulation. The co-regulation items were based on a draft co-regulation measurement tool developed for use in youth-serving HMRE programs (Alamillo et al. 2021). For our analysis, the SIMR team compared co-facilitator pairs in which at least one facilitator had participated in training and practiced T3 to co-facilitator pairs in which neither facilitator had done the training or T3 practice.[2] This analysis suggests that facilitators' participation in co-regulation training and use of T3 may be beneficial—particularly for students of near peer facilitators.

The SIMR team used Bayesian analysis to estimate the probability that facilitator co-regulation training and T3 improved—or worsened—students' ratings of their facilitators' relationships, co-regulation, classroom management, and overall program quality (see Box 2.1 for an explanation of Bayesian analysis). We compared the responses of students in classrooms where at least one facilitator received the training to the responses of students in classrooms where neither facilitator received the training. AYRE project leaders selected facilitators to participate and did not do so randomly. Therefore, we cannot say with confidence that T3 caused any of the differences we observed. However, these findings suggest that focusing on staff self-regulation and co-regulation may be a promising practice for HMRE providers.

Findings for near-peer co-facilitation pairs. Students taught by near-peer co-facilitation pairs in which one facilitator had participated in training and practiced T3 tended to have more favorable opinions of the facilitators and more positive perceptions of the HMRE workshop overall. According to our analysis, there was an 80 to 90 percent chance that students in classrooms with at least one facilitator trained in T3 gave more favorable ratings of the following outcomes:

- **Facilitators' co-regulation behaviors,** including encouraging students to notice their feelings, providing positive feedback, and being sensitive to students' feelings and comfort.
- **Student-facilitator relationships,** such as feeling trusted and respected by near-peer facilitators.
- **Classroom management behaviors,** including near-peer co-facilitators' ability to manage classroom comments and behavior appropriately and their ability to manage class time well.

Findings for community facilitator pairs. It was less clear whether having a T3-trained community facilitator was associated with more positive views among students of their facilitators' co-regulation skills. However, there was a high probability (between 75 and 90 percent) that students with T3-trained community facilitators gave higher ratings of facilitators' classroom management behaviors and had more positive overall perceptions of the HMRE workshop than students with community facilitators who were not T3-trained.

These findings suggest that near peers may have benefited from participating in training and practicing T3, despite the inconsistent and incomplete practice of T3. These effects may be because T3 heightened near peers' awareness of their role in supporting youth's self-regulation development and that awareness made a difference in how they facilitated HMRE workshops. Another possibility is that T3 still helped near peers regulate their emotions despite not using the "tag it" step. Some research suggests that people may see benefits from "emotional introspection," without explicitly using language or writing to label a physiological response with an emotion word (Torre and Lieberman 2018). Finally, because facilitators who participated in training and T3 were not randomly selected, we cannot rule out the possibility that the better student ratings we saw were due to other factors. For example, these near peers could have been more open to practices to improve their facilitation skills than facilitators who did not participate in T3.

Box 2.1. Bayesian Analysis

Bayesian analysis is a statistical method that uses evidence from prior studies to help interpret estimates of an intervention's effects. This analysis can provide estimates of the probability that the effect is positive or that it is greater than a specified amount. This contrasts with traditional hypothesis testing, which results in an up-or-down assessment of whether an estimate is statistically significant. The Bayesian analysis also guards against the possible misunderstanding that a lack of statistical significance means a low probability that the program had an effect (Deke and Finucane 2019).

The SIMR team identified a set of 42 experimental studies that tested interventions designed to improve engagement in human services programs. The average observed effect size of these interventions was an improvement in engagement of .09 standard deviations. We then compared average student ratings for facilitators who participated in co-regulation training and practiced T3 to ratings for those who did not. We generated the probability that outcomes were better in classrooms with T3-trained facilitators than they were in classrooms where facilitators were not trained in T3, given the results of that comparison and what was observed in previous studies of similar interventions.

What did we learn about T3 use with AYRE facilitators?

AYRE was interested in using T3 as a strategy to help facilitators manage stressful situations and be better equipped to engage youth in curriculum content. By participating in co-regulation training and practicing T3, AYRE hoped that facilitators would begin to think of their role not simply as teaching content but also as coaching youth to practice and develop the self-regulation skills that are linked with success in adulthood. Program leaders also hoped that T3 would help facilitators recognize the importance of their own self-regulation to forming a supportive and positive workshop environment.

Despite substantial challenges in implementing T3 in the fall 2021 semester, there were some promising signs to justify continuing to focus on helping develop facilitator co-regulation. In qualitative interviews, facilitators were able to describe how emotion regulation strategies had benefited them and helped improve their facilitation. On the pre- and post-surveys, most facilitators indicated strong self-efficacy in their own self-regulation skills and recognized that their own ability to regulate their thoughts, emotions, and behaviors affected youth's self-regulation. Though facilitators reported they did not practice T3 as frequently as expected and tended not to label their emotions using the T3 record, Bayesian analysis suggests a strong probability that receiving co-regulation training and using T3 in some form were associated with more positive student perceptions of facilitation and program quality more generally.

The difficulty that facilitators reported in practicing T3 has two implications for the implementation of staff supports.

- **Facilitators who are young or early in their careers like the near peers in this study may need additional, developmentally appropriate coaching and support in time management, organization planning, and other skills.** Many of the near-peer facilitators were young adults who were still developing their own self-regulation skills. For a large, statewide HMRE provider with many service locations such as AYRE, providing such supports can be a complicated undertaking.
- **There is a risk that making facilitators complete the T3 record as a part of their job responsibilities obscured the goals of the strategy.** Instead, HMRE providers could educate staff about a range of self-regulation and/or co-regulation strategies, empower them to implement the ones that resonate most with them, and check in regularly to find out how they feel the strategies are working and to troubleshoot any challenges they are having with facilitation. T3 was intended as a strategy to facilitate an increase in emotion regulation and thus co-regulation, but co-regulation can exist (between facilitators and students and between supervisors and facilitators) without using a particular strategy.

Given that the facilitators had difficulty finding time to use T3, the SIMR team proposed changes for a third learning cycle. Instead of requiring facilitators to practice T3, the SIMR team would deliver a co-regulation training and lead follow-up coaching sessions, spread throughout the semester. The coaching sessions would be designed to help facilitators set goals for practicing co-regulation strategies and discuss how those strategies were working. Ultimately, AYRE decided not to conduct a third SIMR learning cycle. Instead, the SIMR team tested co-regulation coaching with facilitators from Youth & Family Services, another school-based READY4Life grant recipient participating in SIMR. Details about that test are in Chapter 6.

CHAPTER 3

BUILDING COMMUNITY AND PEER RELATIONSHIPS IN A VIRTUAL ENVIRONMENT WITH MOTHERWISE

Spotlight on: University of Denver MotherWise

- HMRE grant recipient since 2015; originally served new and expectant mothers ages 18 or older; this grant cycle, they received a READY4Life grant for participants ages 14–24.
- Serves pregnant youth and young mothers in the Denver metro area.
- Uses two curricula: (1) *Love Notes,* primarily for participants ages 17 and younger, and (2) *Within My Reach,* primarily for participants ages 18 and older. *Within My Reach* is available in English and Spanish, and *Love Notes* is provided in English. All workshops offer 24 hours of content.
- Groups meet twice a week for six weeks. Participants also receive individualized case management, referrals to community services, and access to the Nest, a social media and messaging app for program participants and alumna.

As part of its rapid cycle learning work for SIMR, the University of Denver's MotherWise program focused on strategies to promote peer relationships and content engagement in the context of virtual service delivery. Many HMRE grant recipients that transitioned to virtual services during the COVID-19 pandemic faced challenges adapting curriculum content, adjusting group activities, acquiring technology, ensuring participants had access to broadband Internet, and engaging and establishing trust with participants (Gearen et al. 2021). Even as local jurisdictions relax pandemic public health measures, some programs, like MotherWise, plan to continue offering at least some of their HMRE services virtually. Therefore, strategies to strengthen virtual service delivery will remain highly relevant.

The University of Denver first launched MotherWise in 2015 with funding from the previous HMRE grant cycle. In its initial iteration, the program served new and expectant mothers ages 18 or older and offered instruction and information on relationship skills, parenting, and other supports (Baumgartner and Paulsell 2019). Under the current grant cycle, MotherWise continued to offer a similar set of services but shifted its focus population to pregnant women and mothers ages 14 to 24. When the COVID-19 pandemic forced MotherWise to cancel all in-person services in 2020, making virtual services more engaging became a top priority. According to MotherWise staff, most participants had "Zoom fatigue" from the many videoconferences they participated in during the pandemic, including virtual school, and they were disinclined to use their web cameras. This reluctance meant that many young women receiving services did not know what other participants in their workshops looked like. The lack of camera use also made it difficult for facilitators to tell whether participants were paying attention or how they were reacting to the content.

The second challenge related to virtual engagement was building a sense of community in a virtual space. Young mothers often struggle with isolation and are at greater risk for depression than older mothers (Nunes and Phipps 2013; Divney et al. 2012; Birkeland et al. 2005). Before the pandemic, MotherWise used a number of strategies to promote the development of social networks and a sense of community among participants, such as creating a welcoming and safe workshop environment and hosting events for participants and their children (Baumgartner and Paulsell 2019). MotherWise reported that participants joining HMRE workshops via Zoom did not have those informal opportunities to build relationships that in-person services provided. Participants at in-person workshops could get to know each other over group meals before the workshop or during breaks. Zoom participants joined the meeting

right when the workshop started and left right when it ended. For this reason, strategies for promoting strong social networks among participants were also a top priority for the program.

Despite these drawbacks, MotherWise staff also perceived some benefits of virtual services. First, offering at least some of their services virtually made it possible for MotherWise to recruit and enroll young mothers from outside of the Denver metro area. Second, transportation had been a persistent problem for MotherWise participants, because public transit in much of Denver was inadequate, and getting on and off of buses with children, a stroller, and other equipment was difficult for many participants (Baumgartner and Paulsell 2019). As many service providers began to return to in-person services in spring and summer 2021, MotherWise elected to keep all of its services virtual. Most, if not all, participants had infants who were too young to be vaccinated. However, even as vaccines were approved for younger children and MotherWise planned to return to in-person services in 2022, the grant recipient remained committed to offering virtual workshops for participants who could not attend in person.

MotherWise tested three strategies in SIMR to engage participants in virtual services and encourage peer relationships: (1) Now You See Me, which encouraged participants to use their cameras during virtual workshops; (2) Nest Challenges, which encouraged participants to share experiences with each other in and out of the workshop using a phone app; and (3) a suite of videos developed by and featuring MotherWise staff that replaced lectures and modeled skills, so facilitators could focus on the discussion. As part of SIMR, MotherWise completed three learning cycles, one for each strategy.

Learning question for MotherWise

Can intentionally integrating technology—including cameras, a phone app, and curriculum videos— into a virtual workshop promote participants' engagement and foster peer relationships? To explore this question, the SIMR team and MotherWise staff observed virtual workshops, interviewed MotherWise participants and staff, and surveyed MotherWise staff.

- The **Now You See Me** activity aimed to make participants more comfortable with having their cameras on during the workshop. All participants began with their cameras off. Facilitators asked meeting participants to respond to poll-style cues, such as, "Turn on your camera if you have picked a name for your baby." After each question, the facilitators led a discussion between the participants who turned their cameras on, encouraging them to share more. (For example, a facilitator might ask, "Why did you pick that name?") To combat Zoom fatigue, facilitators gave participants clear guidance about when they should turn on their cameras (such as during group discussions) and when they could turn them off (such as during a lecture).
- **Nest Challenges** aimed to recreate some of the informal sharing and network building in a virtual space. Before participating in SIMR, MotherWise had used its social media app, the Nest, to keep in touch with former participants. In the Nest Challenges strategy, MotherWise tested the Nest with current participants. At enrollment, all participants received fliers and instructions to download and register for the Nest. MotherWise staff provided one-on-one help with registration as needed. During each workshop session, facilitators presented participants with a Nest Challenge question. They then asked participants to post their responses to this question on a group message board in the Nest between group workshop sessions. Questions often asked participants to share things about their lives to build community. In the following session, facilitators shared responses and led conversations between participants about them. In addition, MotherWise staff developed a schedule for posting more frequently on the Nest, providing links to vaccination drives and other community

events; monitored Nest participation; and worked with the app developer to implement usability enhancements, including developing Android and Spanish-language versions and changing the app layout in response to participants' feedback.

- **Curriculum videos** aimed to develop a set of short videos that facilitators could use during group sessions to help them lead conversations they had found challenging in prior virtual workshop series. These videos, produced in English and Spanish, were intended to provide content in a consistent way and enable facilitators to focus their energy during the virtual session on preparing for discussion afterward rather than delivering content. MotherWise developed seven videos in English and five in Spanish during the learning cycle. Given the added challenge of leading discussions in a virtual environment, MotherWise staff hoped the videos would ease the burden on facilitators and enhance their ability to lead challenging group discussions.

Together, these strategies were intended to replicate, in a virtual environment, the engaging and community-building in-person workshops that MotherWise provided before the COVID-19 pandemic.

What did rapid cycle learning look like at MotherWise?

The SIMR team and MotherWise staff conducted three sequential learning cycles—each designed to test a new virtual engagement strategy. The first learning cycle focused on Now You See Me; the second focused on Nest Challenges; and the third focused on use of instructional videos. In each learning cycle, facilitators tested strategies in two to three virtual workshop series, conducted in English and Spanish, to understand how different groups of participants responded to the strategies. Six facilitators participated in the learning cycles.

Learning Cycle 1: June–July 2021

The goal of the first learning cycle was for facilitators to use Now You See Me to help participants become more comfortable with having their cameras on and to increase engagement in the virtual workshop. The strategy was implemented by facilitators in three virtual workshop series: (1) the English-language *Within My Reach* series, (2) the Spanish-language *Within My Reach* series, and (3) the English-language *Love Notes* series.

The SIMR team co-created observation forms with MotherWise to measure engagement during virtual workshop sessions. The forms asked the observer—a MotherWise staff person—to rate the amount of discussion, track whether facilitators used Now You See Me or encouraged participation in other ways, and note the ways participants engaged in the workshop. Facilitators were encouraged to use Now You See Me in different

Learning Cycle 1

June – July 2021

Strategy and Purpose

- **Strategy:** Now You See Me, a participant engagement strategy in which participants respond to prompts or questions by turning their web cameras on or off
- **Purpose:** Facilitators in three virtual workshop series use Now You See Me to encourage participants to use their video cameras

Data

- Facilitator focus group (5 facilitators)
- English workshop observations (3 workshops)
- Spanish-language workshop observations (2 workshops)

Key Takeaways

- Participants engaged with the workshop using chat and other virtual tools but tended not to use video cameras.
- Now You See Me might work better in larger groups.

ways, such as an icebreaker at the beginning of a workshop session or as a way to check for understanding or lead discussion after content delivery. Observation data showed that facilitators used Now You See Me frequently, along with other engagement techniques, such as inviting participants to respond using the chat function or reaction emoji, and prompting participants to respond directly to one another verbally and in the chat.

The learning cycle was designed to answer the following question:

How can facilitators encourage participants in virtual workshops to engage with the curriculum content and use their web cameras?

Observation data showed that participants engaged with activities and conversations during workshops by answering questions verbally and using the chat function, but that Now You See Me did not appear to contribute to increased camera use. Some participants responded to the Now You See Me prompts using the chat. Observation data suggested that participants in the Spanish-language sessions appeared to be more engaged than those in the English-language sessions. The Spanish-language sessions also had more participants in attendance. Facilitators reported that Now You See Me encouraged participant engagement because the activity was energizing and fun, even if many participants did not leave their cameras on once the activity was over. In interviews, facilitators hypothesized that Now You See Me might be more successful with a larger group in which participants can see more people turning their cameras on and off.

Overall, MotherWise staff concluded that Now You See Me was a useful tool to spark discussion in the virtual workshop and wanted to continue using it in other virtual workshop series with more participants. As a result, MotherWise made the following changes for the second learning cycle:

- Continue using Now You See Me, giving facilitators freedom to choose when to use it
- Integrate the Nest, a phone app, into the virtual workshop to provide participants with opportunities to build relationships and get to know each other better.

Learning Cycle 2: November–December 2021

The goal of the second learning cycle was for MotherWise to integrate the Nest into virtual workshops. A third party developed this invite-only social networking app for use by current and former MotherWise participants. The Nest aimed to provide participants with another way to build relationships with each other. It enabled users to create their own profiles, share posts and add pictures, and message other alumna and program staff (Figure 3.1). Before SIMR, MotherWise used the Nest to keep participants engaged with MotherWise and each other after they completed HMRE services, by sending notifications of alumna events and community resources. Participants would receive information about activating their

Learning Cycle 2

November – December 2021

Strategy and Purpose

- **Strategy:** Nest Challenges, questions or prompts that participants respond to between workshop sessions using the Nest, a program-specific phone app.
- **Purpose:** Facilitators assign Nest Challenges to encourage participants to use the app and build relationships

Data

- Facilitator focus group (8 facilitators)
- English-language participant focus group (12 participants)
- Spanish-language participant focus group (12 participants)
- Weekly Nest use data

Key Takeaways

- Facilitators and participants liked using the Nest and participating in Nest Challenges.
- Technology barriers made it difficult for all participants to engage with the Nest.

Nest accounts when they were about to graduate from MotherWise. In the second learning cycle, MotherWise staff shared materials about the Nest with participants at enrollment. Facilitators assigned Nest Challenges between workshop sessions to encourage participants to use the app and learn about each other. MotherWise tested the strategy in two *Within My Reach* workshop series (one conducted in English and one in Spanish).

The learning cycle was designed to answer the following question:

How can MotherWise provide opportunities for participants in virtual workshops to build relationships with each other?

To prepare to test Nest Challenges, MotherWise worked with the SIMR team to update its procedures and the app. The team assigned two staff people to be "Nest Gurus," whose job was to help participants register on the Nest, make community posts, monitor app activity, and communicate with the app developer. The SIMR team helped the Nest Gurus develop a tracker to monitor the number and frequency of posts and the types of engagement posts received, such as likes and comments. The Nest Gurus developed new enrollment materials for participants, including instructions for downloading the Nest and activating their profiles. In reviewing these instructions, the Nest Gurus identified challenges that affected Spanish-speakers. First, activation required an email address, which some Spanish-speaking participants did not have. Second, the app was available only on the Apple App Store, and many Spanish-speakers had Android devices. To address the first challenge, the Nest Gurus developed a process for providing one-on-one support to help Spanish-speakers and those without email addresses to activate their accounts. To address the second challenge, they worked with the Nest app developer to create and test an Android version of the app. They also worked with the developer to implement updates to the app, including translation into Spanish and changing the app's home page to the message boards.

Figure 3.1. The Nest message board

MotherWise staff, including the Nest Gurus and facilitators, developed the Nest Challenge prompts. In the first workshop session, facilitators introduced the Nest to participants and presented them with a challenge to activate their accounts and create a post before Session 2. Challenges in subsequent sessions were intended to build community and were tied to workshop discussions. For example, after a lesson on "knowing yourself first," participants were challenged to take the Personality Color Wheel test, included in Within My Reach, and post about their personality type. In the session immediately after a challenge, facilitators dedicated time to sharing some Nest Challenge responses and leading a discussion about them.

In focus groups, participants reported that they enjoyed the Nest Challenges and liked that the Nest provided them with the opportunity to build community, which they felt was missing from the virtual workshops. Facilitators thought the Nest Challenges helped increase engagement and discussion in the virtual workshops. Participants thought the Nest Challenges did a good job reinforcing workshop content.

The Nest Gurus said about half the participants were able to complete Nest Challenges from week to week, and that it took nearly half the workshop series for most participants to activate their accounts. The number of weekly Nest posts increased over time, as more participants activated their accounts, responded to Nest Challenges, and began posting other content.

Participants and facilitators identified areas for improvement. Technology was the primary barrier. Despite updates, participants and facilitators found the Nest user experience clunky and buggy. For example, some reported that the app was hard to navigate. Spanish-language participants reported difficulty activating their accounts and understanding resources and posts in English. Overall, MotherWise staff found the Nest to be a useful addition to virtual workshops but said it was time-consuming to monitor the Nest and address technical issues.

At the end of the second learning cycle, the Nest Gurus intended to continue working with the developer to make the app less buggy and easier to navigate.. MotherWise made the following changes for the third learning cycle:

- Continue using Now You See Me as facilitators saw fit.
- Continue using Nest Challenges to engage participants. Instead of having separate challenges for each ongoing workshop series, MotherWise staff planned to post one weekly challenge for all app users, and facilitators would invite current workshop participants to respond every week.
- Focus on developing and testing the use of short, engaging videos about challenging topics that staff identified, to supplement existing curriculum content and enable facilitators to focus on leading engaging discussions

Learning Cycle 3: May-July 2022

The goal of the third learning cycle with MotherWise was to create and test the use of short videos in a virtual workshop to cover program content. Having developed and tested strategies to encourage participants to feel comfortable participating in the virtual workshop and to get to know each other, the videos tested in the third learning cycle were designed to promote engaging discussion. The MotherWise team believed that creating videos that covered these topics would have several benefits: (1) they would provide the content consistently and in a more engaging way than a scripted lecture; (2) they would make facilitators' jobs easier, because facilitators would be free to focus on preparing for the discussion after the video; and (3) they would supplement videos in *Within My Reach* with less dated-looking content.

MotherWise leadership staff discussed facilitation "pain points" with facilitators and identified seven topics in English and five topics in Spanish that MotherWise participants had had difficulty discussing and comprehending in past virtual workshop series (Table 3.1). Some of the curriculum topics contained messages that could be contentious or that some participants might not agree with. For example, MotherWise's session on cohabitation discussed research suggesting that cohabitation might be linked to negative relationship outcomes (Rhoades et al. 2009). Because many participants want to live with or currently live with partners before marriage, this content led to challenging group discussions. Having this content covered in a short video enables the facilitator to focus on managing the subsequent discussion of it. Some of the videos were designed to demonstrate skills taught in the curriculum. For example, MotherWise staff wanted to make a video demonstrating the speaker–listener technique in Spanish, because they were unsatisfied with the Spanish-language videos covering this curriculum topic. The MotherWise team scripted and produced the videos, which were typically less than five minutes long. The MotherWise project director, who was an author of *Within My Reach,* approved the content.

The learning cycle was designed to answer the following question:

How does the use of short videos in a virtual workshop help facilitators engage participants in challenging workshop content?

MotherWise tested videos in three *Within My Reach* workshop series, two in English and one in Spanish. The SIMR team and MotherWise staff conducted 24 workshop observations during these series using an observation form they developed together to examine how facilitators engaged participants and how they reacted to the videos. After each session, facilitators completed a short survey about video use. The SIMR team also interviewed facilitators who participated in the learning cycle.

According to facilitators, the videos were helpful for covering difficult topics. In interviews, facilitators said the videos were helpful because they presented organized summaries of topics. In surveys, facilitators said they used the videos most often to provide relatable examples, save time, and summarize class discussions. Having videos to present content made it possible for the facilitators to focus on leading group discussions.

Table 3.1. Topics of MotherWise-created videos

Topic	English-language	Spanish-language
Hidden issues and events	✔	✔
Cohabitation	✔	✔
Dedication and constraints	✔	
Taking a time out and recognizing the best time to have a discussion	✔	
The importance of fathers		✔
Stepfamilies	✔	
Legacy of abuse and other childhood hurts	✔	
Making X-Y-Z statements		✔
Sliding versus deciding	✔	✔

Facilitators reported that participants had productive, positive, and engaged conversations after viewing a video. One facilitator reported that the Spanish-language video on cohabitation allowed the discussion to be "lighter." Another facilitator reported that the Spanish-language videos helped Spanish-speakers feel understood and respected, instead of judged. In one interview, a facilitator reported that participants could relate to the content as it was presented from an empathetic perspective in the video, and that

encouraged them to share their experiences. She said facilitators "didn't get that [response from participants] when we just presented the content ourselves." For example, one facilitator relayed an experience debriefing a video about why arguments about small issues can turn into big fights: "It was easy to understand more about why people get angry. [The video] encouraged one participant to share… that now she thinks [her partner] might have a hidden issue."

Facilitators reported that participant engagement was high after showing videos, which workshop observations reinforced. Several of the videos posed questions for participants or set up facilitators to ask for reactions, which facilitators reported made transitioning to the discussion easier. To lead discussions after the videos, facilitators prepared discussion questions, affirmed responses, and encouraged participants to respond to each other. Participants' limited video camera use made it hard for facilitators to tell whether participants were paying attention while a video was being shown. Reflecting on a video about child abuse, one facilitator wrote, "There was lots of class participation and positive feedback in chat. [Video camera use] didn't necessarily affect engagement." Observers said participants were active in discussions after the videos, both verbally and through the chat feature, but confirmed that few participants were on camera.

> **"[The video] encouraged one participant to share… that now she thinks [her partner] might have a hidden issue."**
>
> ***—MotherWise facilitator***

Some facilitators reported that videos helped participants understand content better. After a video about the speaker–listener technique, one facilitator said, "Participants were able to identify the problems in communication prior to using the technique and while using the technique. This offered a lot more engagement and understanding of the technique." After a Spanish-language workshop series, one facilitator reported that a video might have helped participants consider a different perspective: "I think the video swayed participants to focus on the positive impact of fathers. That led to a great discussion." Another facilitator said the discussion after a video about the constraints that might keep someone in an unsatisfying relationship showed her she needed to spend more time reviewing the topic in the next session.

Facilitators had discretion about whether to use a video during a given workshop session. One facilitator said the decision to show a video in a workshop depended on how they thought participants would respond. It was standard practice for facilitators to communicate with each other before a workshop session about participant experiences that had come up in case management meetings. This enabled facilitators teaching workshops to anticipate those issues and be sensitive to them. For example, if a participant had disclosed past abuse during case management, facilitators would know to provide a warning before showing a video about the legacy of childhood trauma. During the third learning cycle, facilitators chose to show a video in 17 of 19 workshop sessions when a video was available.

> **"I think the video swayed participants to focus on the positive impact of fathers. That led to a great discussion."**
>
> *—MotherWise facilitator*

Overall, MotherWise staff concluded that the videos enriched virtual workshops and encouraged discussions around topics that had been difficult to discuss in prior workshop series. Because of the perceived benefits of the videos, MotherWise staff determined that in addition to continuing to use them in virtual workshops, the videos could be used to provide individual makeup sessions with facilitators, as a part of in-person workshops, and on the Nest as content reinforcement.

What did we learn about using technology to develop engaging virtual services with MotherWise?

Through the three learning cycles, MotherWise developed and tested three strategies for building community and engagement in virtual workshops. These strategies offered a range of opportunities for participants to engage with curriculum content and build community with their peers. Facilitators built their toolbox throughout the learning cycles, continuing to use Now You See Me and Nest Challenges after the learning cycles testing those strategies had ended. In addition to enriching virtual services, MotherWise staff found that tools like the Nest and content videos could be useful for participants in in-person workshops, which the grant recipient started to provide again in summer 2022.

Through three learning cycles, MotherWise and the SIMR team developed three lessons about engaging and building community in virtual HMRE workshops.

- **Intentional technology use can create a safe and welcoming group environment that encourages engagement.** The Now You See Me activity tested in the first learning cycle encouraged participants to use their cameras so they could get to know each other while respecting their desire to sometimes be off camera. Nest Challenges prompted participants to share things about each other and identify things they had in common to build a foundation for increased engagement in the virtual workshop. Facilitators found that using videos to deliver content or demonstrate skills enabled them to focus on leading productive and engaging group discussions.
- **Although some virtual engagement strategies are simple and low-burden, others can be time-consuming to develop and implement.** The Now You See Me strategy relied on technology that was built into Zoom, the videoconferencing platform that MotherWise used. Throughout the three learning cycles, facilitators had success encouraging participant engagement through other Zoom features, like chat and reaction emojis, even if camera use remained low. Strategies tested in the second and third learning cycles required more investment. MotherWise staff needed to make a number of adaptations to the Nest app to implement the Nest Challenges strategy. They assigned specific staff members to lead the strategy, who found it time-consuming to monitor the app and provide ongoing technical support to participants with limited access to technology. In the third learning cycle, MotherWise staff had to identify topics for, script, and produce 12 videos.

- **Engaging facilitators' expertise can be a productive way to develop and test engagement and community-building strategies.** Observations conducted in the first and third learning cycles showed that MotherWise facilitators were skilled at encouraging participant engagement, even when presented with challenges, such as participants' limited camera use and conversations happening verbally and in the chat function at the same time. In all three learning cycles, MotherWise relied on facilitators' expertise. The grant recipient involved facilitators in developing tools and gave them discretion to implement the tools as they saw fit.

CHAPTER 4

HELPING YOUTH IN HIGH SCHOOLS SET AND ACHIEVE GOALS THROUGH CASE MANAGEMENT WITH MORE THAN CONQUERORS, INC.

Spotlight on: More Than Conquerors, Inc. (MTCI)

- HMRE grant recipient since 2006.
- Serves youth in two high schools in Gwinnett County, Georgia, a suburb of Atlanta.
- Uses *REAL Essentials Advance* in health classes, primarily for youth in grades 9 and 10.
- At least twice in the school semester, case managers meet with every student in the classroom during the class period in which MTCI provides services to help youth identify and set goals, and provide referrals for support services.

For the SIMR project, More than Conquerors, Inc. (MTCI) focused on developing a structured approach to school-based case management for youth enrolled in its HMRE workshops to address a challenge related to content engagement. MTCI provides *REAL Essentials Advance* during health classes in two Atlanta-area high schools to youth primarily in grades 9 or 10. MTCI had provided a limited form of case management in previous grant cycles, offering referrals to youth who expressed a need for community services. For the current grant cycle, MTCI wanted to provide regular case management to more youth. With the SIMR team, MTCI implemented and tested a case management approach to help case managers develop meaningful relationships with youth and engage youth around curriculum content about goal setting. The approach was informed by research on goal attainment and self-regulation skills development (for a summary of the literature, see Cavadel et al. 2017). By adopting a research-informed approach, MTCI hoped that having case managers coach youth to set goals would give them an opportunity to develop and practice those self-regulation skills fundamental to the broader set of skills and concepts taught in *REAL Essentials Advance.* In doing so, case management could be more relevant and engaging to youth, as well as a tool to engage them in important workshop content.

Goal attainment and self-regulation

Self-regulation is the process of coordinating one's thoughts, behaviors, and emotions to achieve one's goals. Goal attainment refers to a process for setting and achieving goals that builds self-regulation skills. These steps include identifying a meaningful goal; breaking it into smaller, achievable steps; proactively identifying potential obstacles to achieving the goal and ways to avoid them; taking action to achieve the goal; and reflecting on progress.

Sources: Cavadel et al. 2017; Derr and McCay 2018; Gollwitzer and Oettingen 2019.

Practicing the steps of goal attainment can help youth develop self-regulation skills. Self-regulation—the process of coordinating one's thoughts, behaviors, and emotions to achieve one's goals—involves skills that youth need to make healthy decisions and choices that will help them achieve life success (Cavadel et al. 2017; Center on the Developing Child at Harvard University 2014). Goal attainment involves exercising self-regulation skills, such as goal setting and planning, following four steps: (1) identifying a specific goal; (2) planning for progress by breaking the goal into smaller, achievable steps; (3) pursuing the goal; (4) and reviewing progress toward achieving the goal (Table 4.1). Many HMRE curricula

touch on the self-regulation skills involved in goal attainment but rarely teach them directly or provide opportunities for youth to practice those skills (Baumgartner et al. 2020). MTCI included a lesson from *REAL Essentials Advance* on the success sequence in its HMRE workshop, which included references to setting and achieving goals, but with little instruction in how to do so.[3]

According to MTCI's initial plans, all youth in classrooms assigned to receive case management would have between one and four case management meetings, including an initial meeting for all youth.[4] If the case manager gave a referral at the initial meeting, they would then conduct three additional follow-up meetings with the youth. Youth who did not receive a referral would not receive any follow-up meetings.

Table 4.1. Self-regulation skills involved in goal attainment

Steps	Selected self-regulation skills being practiced
Identifying a goal (initial meeting)	**Working memory:** The ability to retain and consider many pieces of information at one time **Metacognition:** Being able to describe your thought processes and the way you think about things (what is important to you, and why) **Motivation:** Self-efficacy, or the desire and belief that you can be successful
Planning for progress (initial meeting)	**Planning:** The ability to develop in advance a plan for action with multiple steps **Prioritization:** Identifying the relative importance of two or more different tasks
Pursuing the goal (time between initial and follow-up meeting)	**Task initiation:** The ability to start a task by breaking it into steps, identifying the sequence of steps that needs to be taken, and taking the first step **Time management:** The ability to control the time spent on things and use time effectively to accomplish a task productively. **Impulse control:** The ability to slow down and think ahead before responding or acting **Problem solving:** The ability to identify a problem, brainstorm solutions, choose a solution, enact the solution, assess how it worked, and try again **Decision making:** The ability to evaluate consequences and make choices that prioritize long-term gain **Persistence:** The ability to keep working through a challenge
Review/revise (follow-up meetings)	**Self-reflection:** Comparing outcomes and accomplishments to original goals, identifying actions that contributed to outcomes, and recognizing progress made and lessons learned **Flexibility:** The ability to adapt to changing conditions

Source: Cavadel et al. 2017; Derr and McCay 2018.

MTCI's initial plan presented three main logistical challenges:

1. **Limited time to meet with youth.** MTCI was restricted to providing case management to youth during their HMRE workshop sessions. The schools with which they partnered would not allow MTCI case managers to pull youth from other class periods during the school day, and the grant recipient considered it infeasible to hold case management sessions during free periods or after school.
2. **The length of the needs assessment.** The lengthiness of the needs assessment conducted during the initial case management meetings meant that case managers would likely spend most of the semester conducting these meetings with youth, leaving little time to follow up with youth who received referrals.

3. **Providing referrals.** In the last grant cycle, MTCI also offered case management as part of its school-based HMRE program for youth. MTCI staff reported that during the last grant cycle, they rarely offered referrals during case management sessions—an observation supported by service receipt information recorded in nFORM. If few or no youth received referrals, then most youth would receive only one meeting from a case manager during the school semester. MTCI and the SIMR team determined it was unlikely that MTCI's local evaluation would be able to detect any effects of adding case management to its HMRE program if the case management it offered was of such low intensity.

As a result of these challenges, MTCI and the SIMR team sought to adjust the grant recipient's approach to case management. Together, they developed a revised approach that sought to make it possible for all youth to receive at least one initial and one follow-up meeting, and have case management reinforce the lessons taught in *REAL Essentials Advance*.

The case management approach MTCI and the SIMR team developed had four components.

1. **Introduce goal setting concepts.** MTCI rearranged the *REAL Essentials Advance* lessons to introduce the success sequence during the second week of class. Following the success sequence requires youth to set goals and be future oriented.
2. **Conduct initial meetings.** Initial meetings began after the class on the success sequence. Using a goal setting worksheet, case managers guided youth in a goal setting process to anticipate obstacles, identify strategies to avoid those obstacles, and identify next steps they could accomplish to make progress at 30, 60, and 90 days. Case managers also provided referrals to community organizations as needed.
3. **Conduct follow-up meetings.** In Learning Cycle 1, MTCI planned to provide a follow-up meeting to every student 60 days after the initial meeting to check on their progress toward achieving the goal they set. If a youth received a referral, they would also have a follow-up meeting at 30 and 90 days after the end of the school semester. The plan and timeline for follow-ups was revised in the second learning cycle (discussed in the next section).
4. **Track youths' progress.** The SIMR team and MTCI co-created a template to help standardize case notes in nFORM.

Learning question for MTCI

Can MTCI case managers have meaningful interactions with youth in the time allotted for case management during the HMRE workshop? To explore this question, the SIMR team analyzed nFORM data and a grant recipient-administered student survey, reviewed case notes, and surveyed and interviewed case managers.

What did rapid cycle learning look like at MTCI?

The SIMR team and MTCI conducted two learning cycles. The first one took place during the fall 2021 semester and the second during the spring 2022 semester. Both took place at Discovery High School and Meadowcreek High School, large public high schools in Gwinnett County, in the suburbs of Atlanta, Georgia. In Learning Cycle 1, 100 youth received case management. In Learning Cycle 2, 114 youth received case management.

Three case managers participated in the learning cycles. One was assigned to each high school; the third served Spanish-speaking youth in both schools. One experienced case manager supervisor coached the three case managers on using the approach they tested in SIMR. To prepare for the learning cycles, the SIMR team provided a training to the MTCI case managers that provided background on goal attainment

and self-regulation skills, and practiced using a case management script the SIMR team co-developed with MTCI. The training materials were adapted from previous trainings that Mathematica and Public Strategies had delivered in previous ACF projects, including Self-Regulation Training Approaches and Resources to Improve Staff Capacity for Implementing Healthy Marriage Programs for Youth (SARHM) and Goal-Oriented Adult Learning in Self-Sufficiency (GOALS).

The learning cycle was designed to answer the following question:

What is the feasibility of using a goal attainment approach and providing referrals in school-based case management to engage youth in curriculum content about goal setting?

Learning Cycle 1: September–December 2021

The first learning cycle had two goals: (1) to determine whether case managers and youth liked the goal attainment approach to case management; and (2) to determine whether referrals were a feasible focus for case management. MTCI case managers hoped to have at least two case management meetings with every youth in a classroom assigned to receive this service. In the first meeting, MTCI case managers and youth completed a goal setting worksheet (Figure 4.1). All youth would have at least one follow-up meeting to check on progress toward achieving the goal they set. Youth who received a referral during the initial meeting would receive two additional follow-up meetings.

In the first learning cycle, MTCI case managers implemented the case management approach successfully. Youth reported they enjoyed meeting with case managers and that setting goals was helpful. The three case managers found the goal pursuit framework helpful. However, they also reported that the materials meant to support them could be hard to use. Although one case manager indicated the case management script had "the right questions to ask," other MTCI staff reported that the level of detail and rigidity of the script made it hard for case managers to have deeper and more authentic conversations with youth.

SIMR team members reviewed case notes and coded the goals youth set during their initial meetings into several categories, such as academics, careers, and relationships. Most student goals were related to academics, such as improving grades or completing missing assignments for other classes. Based on this review, SIMR team members provided feedback that these goals could be more specific. MTCI staff hypothesized that youth set academic goals because this kind of goal came most easily to mind; they were interested in seeing whether youth would set different types of goals, including goals related to healthy relationships, if the case management script was less rigid.

Learning Cycle 1

September – December 2021

Strategy and Purpose

- **Strategy:** Case managers introduce content about goal attainment in the core workshop and have up to four meetings with youth to set goals and check on their progress
- **Purpose:** Determine whether staff and youth like goal-attainment focus of case management and whether referrals are a feasible focus for school-based case management

Data

- Case notes (3 case managers)
- Case manager survey (3 case managers)
- nFORM data (100 youth)
- Grant recipient-administered survey data (57 youth)

Key Takeaways

- Case managers and youth thought the goal setting approach was helpful but fell short of the goal of meeting two times with every youth.
- No youth reported needs requiring a referral.
- Most youth set goals related to their academic achievement.

Despite staff and student satisfaction with the goal attainment approach to case management, MTCI fell short of its goal of having an initial meeting and a follow-up case management meeting with every youth. Less than 40 percent of youth participated in two meetings. Almost all of the youth who participated in those meetings attended Discovery High School. HMRE services at Meadowcreek High School were delayed by three weeks due to issues related to the COVID-19 pandemic, which contributed to challenges in conducting follow-up meetings.

Figure 4.1. Goal planning worksheet for Learning Cycle 1

Note: The SIMR team adapted this worksheet from the Goal4It! Curriculum (Derr and McCay 2018).

MTCI determined that structuring case management around referrals and offering more than one follow-up case management meeting was infeasible. A review of nFORM data showed that MTCI did not provide any referrals to youth during the first learning cycle. Case managers reported that no youth identified any needs that would require a referral. As a result, no youth participated in more than two case management meetings. In interviews, case managers reported that the limited time they had with youth made it challenging to develop meaningful relationships. They also found the 30-, 60-, and 90-day timeline for follow-up meetings was unrealistic because it took most of the school semester to complete the initial meetings. In a grant recipient-administered survey, most youth reported they wanted more time with their case managers.

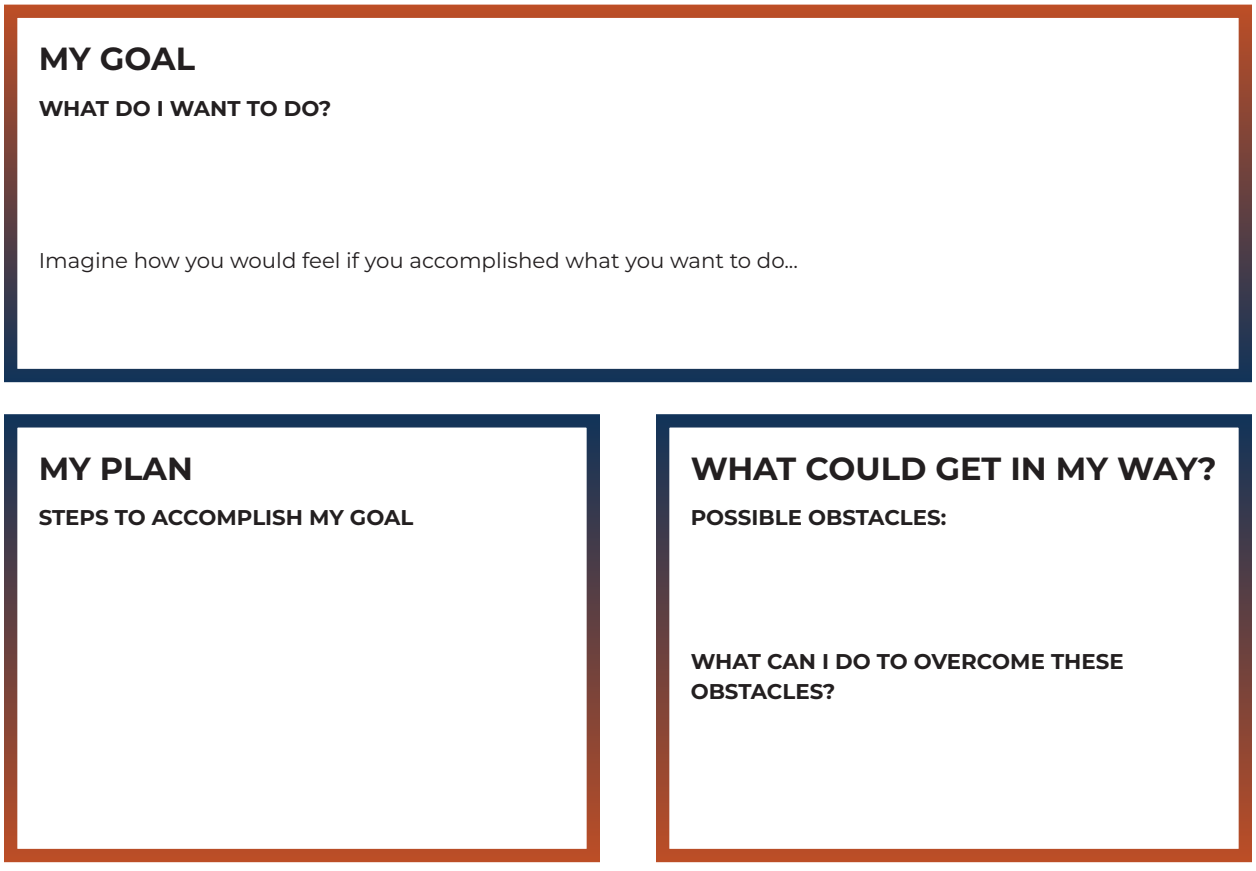
> "[Meeting with my case manager] was helpful, and I will try to use these skills I've learned."
>
> *– MTCI participant*

Based on feedback from the first learning cycle, the SIMR team and MTCI made the following changes:

- **Revised the timeline for initial and follow-up meetings with youth.** The SIMR team and MTCI agreed to remove the option for follow-up meetings at 30, 60, and 90 days because case managers found it infeasible to conduct multiple follow-ups. All youth would receive one initial and one follow-up meeting. Case managers would begin conducting follow-up meetings once all initial meetings were completed.
- **Changed the goal setting worksheet.** The SIMR team and MTCI agreed to revise the goal setting worksheet (Figure 4.2) so it did not prompt youth to set 30-, 60-, or 90-day goals. MTCI staff thought youth would find it confusing for goal setting to be laid out this way if there was only one follow-up meeting.
- **Updated supporting materials.** The SIMR team and MTCI replaced the script used in Learning Cycle 1 with a detailed reference guide for case managers on goal attainment and self-regulation, and a one-page tip sheet with key questions to ask in conversations with youth.

MTCI tested these new strategies and materials in the second learning cycle.

Figure 4.2. Goal planning worksheet for Learning Cycle 2



Note: The SIMR team adapted this worksheet from the Goal4It! Curriculum (Derr and McCay 2018).

Learning Cycle 2: January–May 2022

In the second MTCI learning cycle, the three case managers used the revised case management approach with new classes at Discovery and Meadowcreek. The primary goal of the second learning cycle was to test the new approach to case management to see whether case managers could meet multiple times with all youth, and whether youth set more defined goals in more categories. In Learning Cycle 2, more than 80 percent of youth participated in two case management meetings—more than double the percentage in Learning Cycle 1. Part of the reason for improvement in Learning Cycle 2 was that MTCI was able to start on time in Meadowcreek. MTCI staff observed that many of the youth who received fewer than two meetings rarely or never attended the HMRE workshop.

The learning cycle was designed to answer the following question:

Does a goal attainment focus help case managers engage youth in setting goals and making progress on them?

In interviews, case managers reported the revised script allowed for more organic and meaningful conversations with youth. MTCI case managers believed these relationships helped youth feel more comfortable in setting goals related to things other than academics. A review of case notes showed that youth set more diverse goals. About 6 in 10 youth set academic-focused goals, a somewhat smaller proportion than in Learning Cycle 1, in which almost 9 in 10 youth set this type of goal. In Learning Cycle 2, more youth set goals such as getting an after-school job, improving relationships with friends and parents, improving their physical health, and improving their English-language skills. MTCI staff found the greater diversity of goals encouraging because they wanted youth to set more goals in areas covered by *REAL Essentials Advance*, such as healthy decision making, positive peer relationships, and relationships with parents and other family members.

The goals that youth identified were also more detailed and specific than in the first learning cycle. For example, one student set a goal to improve a grade in a class from a 70 to an 85 and worked with the case manager to identify short-term action steps, including setting aside 30 minutes a day to study and talking with the teacher about assignments the student could make up. Many youth also had multiple secondary goals, suggesting that the goals they set were more detailed. About 4 in 10 of these secondary goals were about time management and attention. Their

Learning Cycle 2

January – May 2022

Strategy and Purpose

- **Strategy:** Modified case management strategy includes providing one initial and one follow-up meeting with all youth and revising goal setting worksheet and supporting materials
- **Purpose:** Determine whether modified case management approach enables facilitators to have more organic and meaningful conversations with youth and explore whether youth report making progress on their goals

Data

- Case notes (3 case managers)
- Case manager interviews (3 case managers)
- nFORM data (114 youth)
- Grant recipient-administered survey data (93 youth)

Key Takeaways

- Case managers and youth thought the goal setting approach was helpful.
- Most youth set goals related to academics and identified steps to practice self-regulation skills.
- A majority of youth were able to have two meetings with their case manager.
- Almost all youth were able to make progress on their goals.

prominence among the goals youth set during case management meetings suggests that case management may have helped youth focus on practicing those skills.

> **The most helpful part [of case management] was being able to hear my goals out loud … [to have] someone helping, supporting my goals, and helping to achieve them."**
>
> *MTCI participant*

In surveys administered by MTCI, youth shared that the most helpful parts of case management were setting and achieving goals, breaking goals into smaller pieces, learning strategies to help improve their grades, and identifying barriers they might encounter. In surveys, youth agreed that one-on-one goal setting helped them understand concepts being taught in class. Youth also reported that the case management meetings helped them be accountable. "The most helpful part [of case management] was being able to hear my goals out loud," said one student, "[to have] someone helping, supporting my goals, and helping to achieve them."

According to case notes, 95 percent of youth reported making progress on their goals in their follow-up meeting. For example, after a follow-up meeting with a youth whose goal was to get his driver's license, a case manager reported: "[The youth] had to take the test twice due to missing some questions. He said he then studied and passed the second time. He learned that sometimes he needs to study. He stated that this was the first time he really studied something and it made the test much easier." To the case manager, this update showed the student's persistence—another self-regulation skill developed and reinforced through the four steps in the goal attainment process (Table 4.1).

What did we learn about using a goal attainment framework for case management with MTCI?

As part of its SIMR rapid cycle learning work, MTCI was interested in refining its case management approach to help case managers have meaningful interactions with youth and engage them in curriculum content about goal setting. The primary obstacle the grant recipient faced was that case managers could meet with youth only during the class periods when the HMRE curriculum was being provided. This constraint limited the intensity of case management MTCI could offer. Over two learning cycles, MTCI and the SIMR team developed and tested an approach to case management grounded in goal attainment and self-regulation skills development. Despite the limited time case managers had available to meet with youth, the approach tested and refined in SIMR enabled MTCI case managers to have at least two meetings with most youth over the course of a school semester. Youth and case managers had positive reactions to the case management, and youth reported appreciating the support they received from their case managers.

Few school-based HMRE organizations provide case management. However, offering case management and mentoring services in schools during the regular school day has been implemented successfully in other contexts. For example, Check and Connect, an evidence-based dropout-prevention model for community organizations working in partnership with school personnel (What Works Clearinghouse 2015), is used in 48 states (Regents of the University of Minnesota 2020). Developing and refining a case management approach for school-based HMRE programming may be worthwhile to support youth in their academic and social growth.

Through two learning cycles, MTCI and the SIMR team developed three key takeaways about providing case management as part of HMRE programs delivered in schools:

1. **Most youth in both learning cycles set goals related to academics.** These goals included improving their grades, building study skills, and attending class more regularly. In the second learning cycle, most youth reported making progress on those goals by the time of their follow-up meeting. Although MTCI expressed a desire for youth to set specific healthy relationship goals more directly tied to the content of *REAL Essentials Advance*, academically focused goals may be more relevant to youth.
2. **Case management that builds self-regulation skills can reinforce HMRE curricula.** Strong self-regulation skills can support the sequential achievement of academic success, employment, and family formation—the foundation of the success sequence lesson included in *REAL Essentials Advance*. Other HMRE curricula include lessons on similar topics. In Learning Cycle 2, a substantial number of youth set goals related to self-regulation skills. Almost all youth who received follow-up meetings reported making progress on their goals, suggesting they were able to practice these skills after meeting with their case manager.
3. **Offering case management in schools can be logistically complicated.** Due to the limited window of time MTCI case managers had to meet with youth, meetings averaged 10 minutes in both learning cycles. School-based HMRE service providers interested in providing case management may want to work with school administrators to explore other ways of providing case management, such as meeting after school or during lunch or study periods.

CHAPTER 5

RECRUITING YOUTH IN RURAL AREAS WITH TEXAS A&M UNIVERSITY AGRILIFE EXTENSION

Spotlight on: Texas A&M University AgriLife Extension Service Success … Powered by You

- HMRE grant recipient since 2015.
- Serves youth ages 18–24 across five counties in the Brazos Valley region in Texas.
- Uses *Within My Reach* in a 12-hour core workshop delivered either in person or virtually. Youth can also opt into supplementary workshops covering financial education, using *Money Smart,* and parenting, using *Common Sense Parenting.*
- Case management includes supports and referrals for community resources and public benefits, development of an individualized service plan, and individualized coaching to encourage attendance at workshops and reinforcement of skills learned during group sessions.

HMRE grant recipients, like many organizations operating voluntary programs, often face challenges recruiting participants (Friend and Paulsell 2020). Recruiting in rural communities can be particularly challenging when service areas cover large, sparsely populated regions. Cultural norms in rural areas may value self-sufficiency and stigmatize seeking services, and close-knit communities in small towns may be insular, making it difficult to recruit and engage participants (Daley and Avant 2013; Ulrich-Schad and Duncan 2018; Keller and Owens 2020).

For the SIMR project, Texas A&M Agrilife focused on recruiting youth between the ages of 18 and 24 in rural areas. Texas A&M Agrilife's HMRE service, known as Success … Powered by You (SPY), serves youth in a five-county region in the Brazos Valley in central Texas. The most populous of these five counties, Brazos County, is home to Texas A&M University, which is among the largest public universities in the country, with more than 70,000 undergraduate and graduate students. The other four counties in the Brazos Valley—Burleson, Robertson, Grimes, and Madison—are rural, sparsely populated counties that together have a smaller total population than the number of students enrolled at Texas A&M. Rather than rely exclusively on Texas A&M students to meet recruitment targets, SPY staff wanted to reach youth in these four rural counties. According to the grant recipient, few service providers—and no other relationship education services—were available to youth between the ages of 18 and 24 in these counties.

Texas A&M Agrilife first received HMRE funding in 2015 to serve adults of any age in the Brazos Valley. Over the first five years of SPY's operation, the grant recipient built relationships with a number of partners in the rural counties, such as Head Start providers, to refer adults to Texas A&M Agrilife's HMRE services. Texas A&M Agrilife was funded again in 2020 to serve youth ages 18 to 24 in SPY. Many of the grant recipient's existing community partners, formed under the 2015 grant, served relatively few youth eligible for SPY's services, which limited the number of referrals they could provide for current HMRE services.

Learning question for SPY

What are the best strategies for recruiting youth living in rural areas? To explore this question, the SIMR team reviewed Instagram analytics, analyzed grant recipient-collected data about how participants heard about the program, and interviewed grant recipient staff. The SIMR team helped SPY develop a process for tracking interest in HMRE services and analyzed nFORM data.

Because of the need to develop new recruitment strategies to attract participants from a narrower service population, as well as the program's interest in serving rural youth, Texas A&M AgriLife chose to focus its SIMR rapid cycle learning work on understanding and addressing challenges to recruiting youth in rural areas. SPY staff worked with the SIMR team to develop a new coordinated recruitment approach for the rural counties that included the following:

- Hiring an outreach specialist to coordinate all recruitment efforts.
- Using Instagram to increase awareness of SPY and engage potential participants. Instagram, a photo- and video-based social media network primarily used on smartphones, is the most popular social media app for Americans between the ages of 18 and 29, eclipsing Facebook (Schaeffer 2021), which SPY had used for recruitment in the 2015 grant cycle.
- Supporting county-specific SPY staff, called coordinators, to develop county-specific recruitment efforts, including direct recruiting and seeking out new community partners. Coordinators were assigned to each county to recruit and facilitate HMRE workshops. Most of the coordinators lived in the counties they served and had ties to their communities.

In preparation for rapid cycle learning, SPY participated in two SIMR activities:

- **Training on outreach and recruitment.** This initial training, delivered in November 2021, focused on developing promising recruitment messages, connecting with potential participants, and doing advertising (Box 5.1). As a part of the training, SPY staff, including coordinators, worked together to identify specific recruitment challenges and potential opportunities in rural counties—ways that current and past participants could help with recruitment and social media messages.
- **Consultations with a social media expert.** The social media expert, who was a member of the SIMR team, worked with the outreach specialist and a student worker to develop an Instagram campaign. These consultations included identifying branding for

Box 5.1. Topics for outreach and recruitment training

1. **Who are you serving?** What are potential participants' whereabouts and interests?
2. **Essential HMRE service elements.** What do potential participants need and want most?
3. **Developing an elevator speech.** Introducing who you are and igniting the potential participant's interest
4. **Connecting with participants:** Establishing connection and trust
5. **Refusal conversion.** Turning a "no" into a "yes"
6. **Marketing tools and platforms.** Current and past participants, advertising, social media, and community events and spaces

the SPY Instagram account, identifying key messages for posts and advertisements, and reviewing content. The social media expert and the rest of the SIMR team also helped the SPY team (1) add links to an online interest form on the grant recipient's Instagram profile page to make it easier for interested youth to sign up for an intake appointment; (2) develop a process for monitoring direct messages from Instagram users who might be interested in enrolling; and (3) develop a tracker to collect data on Instagram engagement, such as the number of users following the SPY Instagram profile and the number of users who "liked" a post. Figure 5.1 provides an example of SPY's updated branding.

Figure 5.1. Example of a SPY branded Instagram post

What did rapid cycle learning look like at SPY?

The SIMR team and staff at the SPY program conducted two learning cycles together during the months leading up to the launch of a virtual workshop series for youth in rural areas. Focusing on recruitment for a single virtual workshop series for rural youth, which they planned to offer quarterly, made it easy for SPY staff to set recruitment targets and assess the success of their recruitment efforts. Although recruitment for these virtual workshops served as the primary focus of the two learning cycles, the cycles also had the more general focus of recruiting rural youth into the program. The first learning cycle took place from November 2021 to January 2022. In this cycle, SPY launched a coordinated recruitment effort that included advertising on Instagram to increase program awareness and attract potential participants, supplemented by direct outreach in rural communities. The second learning cycle took place between February and April 2022. In this cycle, SPY refined its approach based on findings from the first cycle, focusing more on the outreach specialist's role in coordinating county-specific recruitment events and partnership development, and less on using Instagram to recruit new participants.

Learning Cycle 1: November 2021–January 2022

The learning cycle was designed to answer the following question:

What are the most promising ways to recruit youth in rural areas?

In the first learning cycle, SPY staff set a goal of recruiting 20 youth from outside of Brazos County over three months. The grant recipient determined that enrolling 20 youth from rural areas into SPY would represent a meaningful proportion of its overall quarterly recruitment goal of 50 youth. To meet this benchmark, SPY planned a recruitment approach that included (1) advertising through Instagram, led by the outreach specialist; and (2) direct recruitment and partner identification in rural counties, led by coordinators.

Promotion of the program through Instagram. To build an Instagram following, the outreach specialist posted to the SPY Instagram profile one to two times a day and placed three paid advertisements intended to appeal to Instagram users ages 18 to 24 living in rural regions of its service area. SPY also encouraged current participants to follow SPY on Instagram and share it with their peers.

SPY monitored Instagram analytics regularly using a tracking tool it developed with the SIMR team. The tracking tool was intended to compile analytics on the number of followers and engagement with posts (through likes and comments), and make it easier to see trends so the outreach coordinator could improve the content he posted. The SPY and SIMR teams particularly focused on tracking the number of followers as a signal of higher program visibility. The SPY and SIMR teams also reviewed the analytics for each Instagram post. A higher number of likes on posts indicated the messaging and type of posts that appealed most to SPY's Instagram followers.

During Learning Cycle 1, the SPY Instagram account grew to more than 100 followers. This was an important milestone, because it enabled SPY to receive enhanced analytics from Instagram, such as "reach," or the number of unique users who viewed a post. Despite the growth in followers, the program found no evidence that Instagram was helping them recruit. No newly enrolled participants indicated they had heard about SPY through Instagram. The outreach specialist found it challenging to tailor content and advertisements for the four rural counties, describing it as being "like casting a net into a large pond and trying to catch a very specific fish."

Learning Cycle 1

November 2021 – January 2022

Strategy and Purpose

- **Strategy:** Recruit youth in rural areas using Instagram posts and advertisements, conducting direct recruitment in rural counties, and identifying partners in rural counties
- **Purpose:** Recruit 20 youth from rural areas into SPY

Data

- Monthly Instagram analytics
- Grant recipient data on recruitment sources
- nFORM data on enrollment and participant characteristics (20 participants)
- Coordinator interviews (3 coordinators)

Key Takeaways

- SPY successfully launched an Instagram campaign and reached 100 followers, but no participants indicated that they had heard about SPY from Instagram.
- Partnerships with rural high schools and referrals garnered the most youth enrollments in those communities during this learning cycle.

> **Tailoring content and advertisements for specific counties was like casting a net into a large pond and trying to catch a very specific fish.**
>
> *SPY outreach specialist*

Direct recruitment and partner identification efforts. Following the training on outreach and recruitment, coordinators took steps to promote recruitment in the four rural counties served by the program. They posted flyers in apartment complexes and at local workplaces, placed advertisements in local newspapers, reached out to people who had participated during the 2015 grant cycle to see if they were interested in refreshing their skills, and asked for past and current participants and grant recipient staff to refer people they thought might be interested. They also reached out to engage potential community partners they had identified in brainstorming sessions, such as high schools. Coordinators conducted most of these activities in January 2022, after the holidays.

Overall, SPY recruited 16 youth from the four rural counties in January, coming close to its benchmark. However, it appeared that Instagram had not played a major role in recruitment. Most participants were either past participants interested in refreshing their skills or referred by community organizations or grant recipient staff. For example, a Madison County high school referred seniors aged 18 and older to SPY. These students participated in a separate in-person workshop series.

SPY staff concluded that advertising on Instagram was not a good use of resources because it did not seem likely to generate new recruits for HMRE services. However, the SPY team thought Instagram could still be useful as a way of sharing messaging and information about HMRE services with its network of followers, which included past and current participants and partner organizations.

For Learning Cycle 2, SPY elected to pivot to an approach less focused on Instagram. Instead, it supported coordinators in developing and implementing recruitment efforts for the counties they served. Specifically, SPY made the following changes:

- Had the outreach specialist work individually with coordinators to develop and implement county-specific recruitment plans
- Maintained the frequency of posting on Instagram with the goal of using it to build name recognition and help visitors to the SPY Instagram profile understand what it offered to its participants
- Ceased advertising on Instagram
- Prioritized attending in-person events, including those that attracted residents from multiple counties, and provided materials with QR codes for the SPY interest form and Instagram profile page

Learning Cycle 2: February–April 2022

The goal of Learning Cycle 2 was to enroll 20 youth from rural counties in the three months between February and April 2022. The grant recipient elected to keep the recruitment benchmark the same as in Learning Cycle 1. As a part of the

Learning Cycle 2

February – April 2022

Strategy and Purpose

- **Strategy:** Modified recruitment approach focuses on planning and implementing county-specific direct outreach and partner identification efforts, coordinated by an outreach specialist
- **Purpose:** Recruit 20 youth from rural areas into SPY

Data

- Grant recipient data on recruitment sources
- Instagram analytics
- nFORM data on enrollment and participant characteristics (25 participants)

Key Takeaways

- Attending in-person community events and following up with youth after the event was the most promising recruitment strategy.
- SPY continued to build partnerships, especially with local high schools, which generated enrollment in several rural counties.

focus on county-specific strategies, the outreach specialist discussed recruitment strategies with each county's coordinator. Each coordinator then developed a written plan and discussed it with the outreach specialist, and the specialist supported each coordinator in implementing the plan. Together, they identified local organizations that could serve as potential partners, as well as upcoming events to attend in each county.

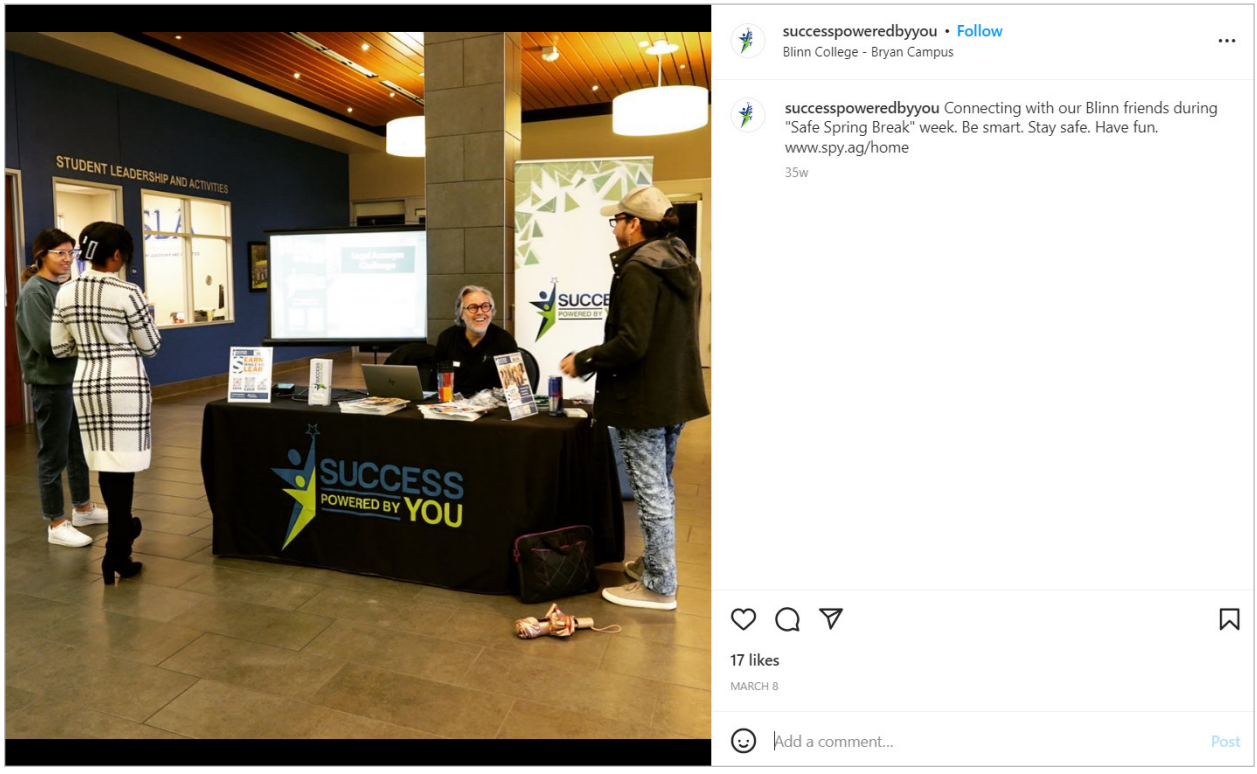
The learning cycle was designed to answer the following question:

What are the most promising ways to recruit youth in rural areas?

Local events included those that attracted youth from across the Brazos Valley region, such as First Fridays, a monthly street fair in Brazos County that attracts residents from across the valley, as well as those that tended to reach only youth in a particular county (Box 5.2). Coordinators found that large, family-focused events could present promising recruitment opportunities. Coordinators in two counties attended Easter egg hunts sponsored by local governments. Although few eligible youth attended these events, which were geared toward young children and their families, the coordinators found that several attendees had older children, relatives, or family friends who were eligible and potentially interested. Coordinators tracked interest at the event and followed up by phone or email with interested participants to provide more information on the program after some of the events. One coordinator identified best practices for following up with potential participants, which she shared with the rest of the SPY team (Box 5.2). Multiple coordinators noted that self-sufficiency was a strong cultural value in the region, and that many people living in rural areas had negative reactions to "seeking help." As a result, they avoided language that made it sound as if HMRE services were similar to therapy or counseling.

Two counties developed promising partnerships with their local Community Resource Coordination Groups (CRCG). These county-based groups, made up of community partners such as the Housing Authority, county judges, parole and probation offices, behavioral health providers, and other community-serving organizations, coordinate services and supports to better meet the needs of those they serve.

Figure 5.2. SPY Instagram page post of an event at Blinn College



The outreach coordinator attended monthly meetings in two counties to share information about SPY and get to know other participating organizations. At the meetings, staff handed out program materials and answered potential partners' questions about SPY.

SPY's outreach specialist also connected with youth-focused networks and organizations. First, the program applied for and was accepted to be listed on the Juvenile Offender Tracking System (JOT), which provides a database of available services and resources for youth with justice system involvement. Other community organizations previously had reported to SPY that they successfully received referrals from being a part of this network. SPY also began developing a partnership with a program under the Workforce Innovation and Opportunity Act (WIOA) that specifically serves participants ages 18 to 24.

Coordinators also continued to explore partnerships with rural high schools. In Robertson County, the coordinator established a relationship with a high school and, in addition to recruiting for the virtual workshop, filled an in-person workshop series almost entirely with participants referred from the school. SPY coordinators in Madison and Grimes counties also continued to work with high schools, although they did not enroll any students during the second learning cycle. Each coordinator noted the importance of offering flexible service delivery options to meet the individual needs of each school, including being flexible with both mode and schedule. Coordinators found that some high schools were more interested in hosting in-person workshops for their students than referring them for virtual, out-of-school workshops. The coordinators were able to pivot to meet the needs of these schools. As a result, SPY offered both in-person and virtual workshops to youth in rural areas during Learning Cycle 2.

SPY kept building its Instagram presence by posting about the program and the opportunity to enroll in the April virtual workshop. The outreach specialist also highlighted the events SPY staff attended in the community and introduced SPY staff on Instagram. The SIMR team continued to monitor Instagram analytics, focusing on new followers and the number of likes per post. The SPY team observed that posting more frequently did not translate directly to greater engagement and, over the course of the learning cycle, decreased their frequency of posting to focus on other recruitment opportunities. The SPY team also observed that posts featuring photos and video of SPY staff in the community received the most engagement and generated the most followers (Figure 5.2).

Box 5.2. Rural recruitment strategy: Attend local events that attract youth and their families

SPY identified events in each of the rural counties it serves that could serve as potential venues for program recruitment. The grant recipient found that even if attendees of these events were not eligible for SPY, they often had family members who were eligible and who would provide information to them. Examples include the following:

- **First Friday.** A monthly street fair in downtown Bryan, Texas, a cultural district in Brazos County with many locally owned restaurants and businesses; First Friday is an event that draws in residents from the entire Brazos Valley
- **Safe Spring Break.** A weeklong informational fair for students at Blinn College, a junior college primarily serving commuter students from all counties in the Brazos Valley
- **County Easter egg hunts.** The Robertson and Burleson County governments hosted Easter egg hunts with games and activities for county children and their families

After community events, coordinators emailed youth who had expressed interest in SPY within a week. One coordinator developed a set of best practices for following up with interested youth through email:

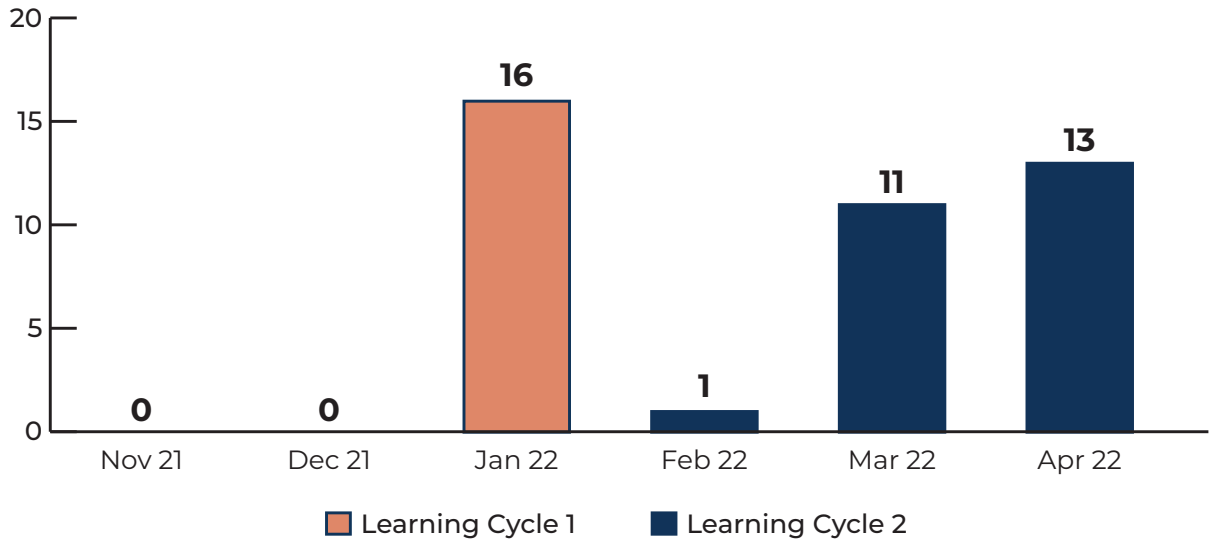
- Personalize the message
- Keep the message concise
- Highlight the value of participating but avoid language that might lead youth to think that HMRE services are like "therapy," because of negative reactions to "seeking help"
- Mention that participating was free and convenient
- Offer an opportunity to ask further questions or discuss the program by providing contact information

In Learning Cycle 2, SPY enrolled 25 youth from the four rural counties in its service area, exceeding its goal. Similar to Learning Cycle 1, enrollment primarily came from referrals, including word-of-mouth referrals from current and former participants. Of the 25 youth enrolled in SPY from the four target counties, 12 enrolled through the high school in Robertson County, indicating this referral source was particularly useful. SPY staff identified 30 interested and eligible youth through community events, eventually enrolling 6 into the virtual workshop series. Going forward, SPY identified a need to focus more on following up with interested participants and convincing them to enroll.

What did we learn about recruiting in rural areas for the SPY program?

Through its efforts, SPY successfully recruited youth from the rural counties in the Brazos Valley. Over two learning cycles, SPY enrolled 41 youth from the four rural counties in its service area (Figure 5.3). Referrals from public high schools were the primary source of recruitment for youth living in rural areas. SPY found that direct recruitment through attendance at community events was another promising strategy. Indirect recruitment, such as posting flyers in communities and placing advertisements in print newspapers and on Instagram, was less successful. SPY also began developing promising referral relationships with networks of community organizations, though these partnerships did not result in any referrals during the two learning cycles.

Figure 5.3. SPY enrollment of youth from the four rural counties in its service area, November 2021–April 2022



Source: nFORM

Through the learning cycles, the SIMR and SPY teams developed several takeaways about recruiting youth in rural areas into HMRE programming:

- **Identify a staff person to coordinate recruitment.** Because of the lack of population centers and the limited community services available, rural recruitment can be particularly labor intensive. For SIMR, SPY hired an outreach specialist with the primary responsibility of coordinating the grant recipients' recruitment efforts. Having an outreach specialist freed up the project director to focus on overall administration of HMRE services. Included in the outreach coordinator's responsibilities were running the Instagram account, developing messaging and materials, leading outreach to new partners, attending community events, and monitoring and supporting coordinators' county-specific recruitment.

- **Recognize cultural and other differences within rural areas.** SPY employed coordinators to recruit participants and facilitate workshops in all of the counties in the Brazos Valley. Most of these coordinators also lived in the county for which they were responsible and had long-standing ties to the community. In a training at the beginning of Learning Cycle 1, the SPY and SIMR teams engaged these coordinators in identifying potential recruitment activities for their counties, and how to sell services. Coordinators provided important insights. For example, they highlighted that many rural residents have an aversion to "seeking help," that one county's government offices shared information in ways another county did not use, and they needed to be sensitive to rivalries between different towns.
- **Be systematic.** In Learning Cycle 2, SPY focused on developing and implementing county-specific strategies. Each coordinator identified strategies they thought would work in their counties, based on their knowledge of those communities. The outreach specialist supported them by meeting with each coordinator about their plans, providing materials, and attending events with them. At the end of the learning cycle, the SIMR team helped the outreach specialist and coordinators identify what had worked well and what could be improved. For example, one coordinator identified promising practices for following up with potential participants and shared them with other coordinators so SPY could continue to work on converting more potential participants to enrollments (Box 5.2).
- **Think creatively about partners and events.** Before the 2020 grant, SPY served adults. The change in focal population for the current grant compounded SPY's recruitment challenges because their existing community partners did not serve enough youth ages 18 to 24 to provide a steady stream of referrals. Over the two learning cycles, SPY was creative in its outreach to new partners. One promising set of new partners was high schools. Most high schoolers are younger than 18 and thus not eligible for SPY services. However, SPY was able to work with several high schools to identify eligible youth and, crucially, youth who would soon turn 18 and become eligible for services. Another promising outreach opportunity was community events for families, who often could connect SPY to eligible youth. A third example was access to networks of service providers throughout the Brazos Valley. Through them, SPY began to build new community partnerships to replace the ones the grant recipient lost when its service population changed.
- **Be flexible in providing services.** Transportation is a common participation barrier for HMRE workshops. It can be particularly challenging if youth in rural areas must travel long distances to a centrally located area to attend a workshop. Also, sparsely populated counties may not support separate in-person workshops in each county. Thus, SPY began providing virtual workshops during the COVID-19 pandemic. The grant recipient decided to keep offering a virtual workshop option to enable more rural youth to attend HMRE workshops, thinking this approach would make it easier for youth in these areas to attend. Rural youths' participation in virtual workshops was high throughout the learning cycles; on average, they completed five of six sessions, suggesting that offering virtual services is a feasible way to provide HMRE services for youth in rural areas while reducing transportation barriers. Although most youth participated virtually, SPY was also responsive to partner needs. For example, in both learning cycles, SPY was able to offer in-person workshops in rural high schools when the high school desired and was able to generate enough program referrals to make in-person services feasible.

Results from the learning cycles led SPY to conclude that Instagram was not a good source of recruitment for youth in the Brazos Valley. At the beginning of its participation in SIMR, SPY staff were hopeful that Instagram would provide an avenue to reach youth in rural areas that was less labor intensive than in-person direct recruitment. They developed branding and messaging to appeal to youth, kept a regular posting schedule, placed advertisements, and built a base of followers. Over the course of two learning cycles, however, no participants told staff that they had heard about SPY through Instagram. Looking forward, the SPY team planned to reduce its Instagram posting schedule further, to two to three times per week, to enable the outreach coordinator to spend more time supporting county-based coordinators and direct recruitment efforts.

Although Instagram did not lead directly to any enrollment into SPY, the grant recipient did learn that it could be a useful tool in supporting other recruitment effects. The outreach coordinator began including QR codes and links to SPY's Instagram profile on flyers and recruitment materials with the hope that posts with teasers from the curriculum and video introductions from coordinators would draw potential participants in and make them want to be a part of a SPY community. The grant recipient also hoped that in the future, Instagram could be a part of a strategy to engage current participants and graduates.

CHAPTER 6

REFINING FACILITATOR PLANNING AND DEBRIEFING PRACTICES WITH YOUTH & FAMILY SERVICES

Spotlight on: Youth & Family Services

- HMRE grant recipient since 2015
- Current READY4Life and FRAMEWorks grant recipient; rapid cycle learning focused on READY4Life-funded services
- Serves teens in high schools and community settings in and around Rapid City, South Dakota
- Uses *Relationship Smarts PLUS 4.0* in a 12-hour core workshop, often delivered during the school day over three to four weeks in health and family consumer sciences classes
- YFS staff co-facilitate HMRE workshops

For the SIMR project, Youth & Family Services (YFS) identified an opportunity to continue refining its approach to co-facilitating school-based youth HMRE workshops and address challenges related to content engagement. In the rapid cycle learning study of facilitation strategies in HMRE youth programs conducted in 2018 and 2019 as part of the Strengthening Relationship Education and Marriage Services (STREAMS) evaluation, YFS worked with Mathematica and Public Strategies to pilot enhanced facilitation strategies. The facilitator curriculum developed through this work, called Strengthening Facilitation Skills with Youth, provided strategies for effective co-facilitation (Roby et al. 2022; Box 6.1). In the 2020 grant period, YFS planned to have teams of co-facilitators lead HMRE workshops in high schools. Each team included an experienced facilitator who had participated in testing *Strengthening Facilitation Skills with Youth* and another facilitator without experience in providing school-based HMRE services to youth.

The co-facilitation strategies that YFS refined in SIMR built on the *Strengthening Facilitation Skills with Youth* curriculum by focusing on supports outside the classroom—specifically, tools to support intentional planning and debriefing. More intentional planning and debriefing would enable facilitator pairs to make sure that each facilitator had ample opportunity to (1) develop a mutual understanding of each other's facilitation approaches; (2) plan specific facilitation and nonverbal communication strategies ahead of time and anticipate potential challenges; (3) reflect on how each workshop session went; and (4) adjust

Box 6.1. Strengthening Facilitation Skills for Youth

The Administration for Children and Families in the U.S. Department of Health and Human Services contracted with Mathematica and its partner, Public Strategies, to develop, implement, and test a facilitation training curriculum that HMRE facilitators and other youth-serving organizations could use in group workshops. Mathematica and Public Strategies partnered with two HMRE organizations, Catholic Charities of Wayne County (New York) and Youth and Family Services, to co-create and formatively refine the curriculum. The curriculum has three modules:

1. Managing Energy
2. Debriefing: Drawing out Teachable Moments
3. Building Trust and Challenging the Comfort Zone

The curriculum for *Strengthening Facilitation Skills with Youth* can be accessed on the OPRE website.

their co-facilitation approach over time. Focusing on these co-facilitation supports would help YFS facilitators develop strong facilitation skills and working relationships, enabling them to better engage youth in HMRE curriculum content.

Learning question for YFS

How did the strategies that YFS tested support strong co-facilitation? To explore this question, the SIMR team interviewed YFS facilitators about their experiences using the tools, collected workshop debriefing tools from facilitators, and interviewed a classroom teacher about his experience working with YFS.

The trainer who led the development of *Strengthening Facilitation Skills with Youth* also led the development of the planning and debriefing tools that YFS tested in SIMR. The tools include (1) a co-facilitator conversation guide to discuss ground rules and learn about their facilitation styles (Box 6.2); (2) a detailed session pre-planning tool (Figure 6.1); and (3) a debriefing tool (Box 6.3). The full tools are provided in a companion brief, "Strategies to Support Co-facilitation in Classroom Sessions" (Buonaspina et al. 2023). For the SIMR project, YFS also tested a classroom teacher conversation guide for school-based HMRE facilitators to have expectation-setting conversations with classroom teachers (Box 6.4) and an approach to coaching facilitators to use co-regulation strategies in HMRE workshop sessions.

YFS offers 12 hours of *Relationship Smarts Plus 4.0* in high schools and community settings around Rapid City, South Dakota. Rapid City is South Dakota's second largest city, with a population of about 75,000 in a region that is otherwise largely rural. When implementing programming in schools, YFS facilitator pairs typically provide the core workshop over three to four weeks in family and consumer sciences and health classes, as well as in grade-level seminars. Co-facilitators often teach up to six hours a day for three to four days a week, with class sizes ranging from 12 to more than 40 students. YFS often provides HMRE programming at six or more schools each academic year. Providing programming in such a wide range of school environments, from larger urban schools to much smaller and remote rural schools, makes it challenging to have a one-size-fits-all approach to facilitation. Through rapid cycle learning in SIMR, YFS adapted planning and debriefing tools to different school environments and contexts. YFS was also able to use planning and debriefing strategies to respond to two challenges that emerged during the school year: developing productive relationships with classroom teachers and ensuring a safe and supportive learning environments for youth.

What did rapid cycle learning look like at YFS?

The first two learning cycles took place during the fall 2021 school semester. Four YFS facilitators tested tools to support intentional planning and debriefing of workshop sessions in two different settings, with the aim of identifying ways in which

Box 6.2. Sample discussion questions in the co-facilitator conversation guide

Examples of questions that YFS co-facilitators discussed before facilitating together in the first learning cycle

1. How could we signal each other to move on or wrap up a topic?
2. The most comfortable way to raise a disagreement with me is…
3. When students ask me questions about my personal behavior or relationships, I usually…
4. When a student directly challenges the content, I usually…

Examples of questions that YFS facilitators discussed during workshop sessions

1. How are we doing on managing the time? Do we need to adjust?
2. Are there any problem behaviors in the group that need to be addressed?

the tools might have to be adapted. The first learning cycle took place in two small, rural high schools, whereas the second took place in an urban high school with large class sizes.

The learning cycle was designed to answer the following question:

How do facilitators view the value of intentional planning and debriefing for supporting strong co-facilitation?

YFS also worked with the SIMR team to conduct two more learning cycles to test two strategies for addressing implementation challenges that arose during the first two rounds of rapid cycle learning. In the first two learning cycles, YFS found that classroom teachers' level of engagement in the workshops differed, and some students struggled with focus, attention, and disruptiveness. YFS's third learning cycle tested the strategy of having conversations with classroom teachers to set expectations around classroom management and curriculum content before a new workshop series began. YFS's fourth learning cycle tested a co-regulation coaching strategy, informed by AYRE's experience with testing T3 (Chapter 2). The third and fourth learning cycles took place simultaneously during the spring 2022 school semester in three rural high schools.

Learning Cycle 1: September–October 2021

The purpose of the first learning cycle was to test tools to support intentional planning and debriefing for co-facilitation teams and to understand the value of planning and debriefing for supporting strong co-facilitation practices. At the start of the learning cycle, the facilitators participated in an initial training that served as a refresher on *Strengthening Facilitation Skills for Youth* and introduced the detailed session pre-planning tool, the co-facilitator conversation guide, and the debriefing tool. Facilitators used the detailed session pre-planning tool and co-facilitator conversation guide before starting the workshops in two rural schools. Facilitator teams carpooled on the hour-long commute to and from each school. They prepared for each session during the morning carpool, filled out the debriefing tool individually, and used the drive back to the YFS offices in the afternoon to discuss their responses on the tool.

As a part of the learning cycle, facilitators submitted their debriefing tools to the SIMR team and participated in interviews. They also administered anonymous youth exit tickets at the end of each class session. Exit tickets contained three to five questions asking students to rate their agreement with statements about the class and co-facilitators, such as "I had trouble paying attention in class," "The class was engaging," and "The facilitators had a good dynamic with each other." Each student had to turn in their exit ticket to the facilitators before being dismissed from class. Some examples of exit tickets for HMRE grant recipients can be found on the HMRF Resources website.

Learning Cycle 1
September – October 2021

Strategy and Purpose

- **Strategy:** Use a pre-planning tool, conversation guide, and debriefing tool to support intentional planning and debriefing of workshop lessons to identify ways to improve facilitation and encourage youth engagement
- **Purpose:** Four facilitators lead workshops in two rural high schools and use tools to support their facilitation

Data

- Facilitator interviews (4 facilitators)
- Session debrief forms (18 forms)
- Youth session exit tickets (373 tickets)

Key Takeaways

- Co-facilitators found that planning before a workshop series supported smoother transitions and co-facilitation in class and helped them be strategic about using facilitation strategies to boost student engagement
- Co-facilitators felt that structured debriefing helped normalize the process of offering suggestions and tips for improvement

Figure 6.1. Sample detailed session pre-planning tool

Section lead facilitator	Topic to cover	Length of section, in minutes (should add to total workshop length)	Activity in section	Supporting facilitator responsibilities (such as slides, video, whiteboard)
Tara	Recap of previous lesson	5	Lecture, large group discussion	Joe runs slides, circulates the room during discussion
Joe	Signs of a healthy relationship	15	Lecture	Tara runs slides, queues up video
Tara	Healthy relationship video	20	Video, think-pair-share	Joe writes key discussion points on whiteboard
Joe	Exit tickets	5	Recap of class, complete exit tickets	Tara distributes and collects exit tickets
		45 minutes		

The co-facilitator pairs found that the tools helped them be more intentional when they were teaching. For example, they were able to discuss ahead of time which facilitation strategies they wanted to use if youth engagement flagged and how to make sure they covered all of the curriculum content before the end of a class period. Regular debriefings helped facilitators normalize providing feedback to each other. According to one facilitator, the tool gave "permission to ask" for feedback and offered a structured way to give it, whereas providing constructive feedback could have been awkward in the absence of that structure. Another noted that the tool helped the pair discuss "things [they] maybe wouldn't have brought up otherwise." The normalization of providing feedback was particularly helpful for new facilitators who were teaching a workshop for the first time. Facilitators also liked that the tool required them to write down their reflections. Documenting helped them better remember and follow through on the changes they wanted to make before the next session. Overall, facilitators reported that planning and debriefing helped them engage youth. In both schools, youth reported high levels of engagement. Almost all youth agreed or strongly agreed that the co-facilitators had a good dynamic with each other.

Looking forward to the second learning cycle, facilitators anticipated that they would have more difficulty continuing to plan and debrief for two reasons. First, because the school in the second learning cycle was close to the YFS offices, staff would not have a carpool commute during which they could plan and debrief together, as they had in the first cycle. Second, each co-facilitator pair would be teaching five back-to-back sessions a day, four days a week. As a result, the facilitators elected to make changes to planning and debriefing for the second learning cycle:

Box 6.3. Questions on the debriefing tool

YFS facilitators used the debriefing tool after each workshop session during the first and second learning cycles. The form included a set of questions with space for facilitators to record their insights and propose changes for the next co-facilitation workshop. Facilitators were instructed to complete the form separately and then compare responses. Among the questions on the form were these:

- What did we do as co-facilitators today that was particularly effective or ineffective?
- When did co-facilitation feel smooth to me?
- When did co-facilitation feel rough to me?
- What could we do to prevent those rough spots in the future?
- One thing I noticed my co-facilitator doing today that I really liked was…
- One new insight I gained from co-facilitating this session was…

- **Planning:** Each co-facilitator pair would meet briefly in the morning before school began to check in and sketch out a plan for the day, in lieu of using the detailed session pre-planning tool.
- **Debriefing:** Facilitators would continue to use the debriefing tool individually. All four facilitators would meet with each other on Fridays to conduct a team debriefing for the week and to take notes. The team debriefing would be structured around the questions on the debriefing form.

The learning cycle was designed to answer the following question:

How do facilitators view the value of intentional planning and debriefing for supporting strong co-facilitation?

Learning Cycle 2: November–December 2021

In the second learning cycle, YFS used the modified planning and debriefing tools while teaching at a Rapid City high school. Although facilitators had less time to plan and debrief as intensively as they had in the first learning cycle, they liked the opportunity to share lessons and troubleshoot with each other in the Friday team meetings. One facilitator said that "when you bring an issue to a bunch of different people, you're going to get a lot of different solutions." The SIMR team helped YFS prepare for the Friday team meetings by creating charts of student exit ticket responses. YFS staff reported that they found it very helpful to review individual responses at the end of the school day and the aggregate data in the Friday meetings.

In the second learning cycle, YFS facilitators identified two implementation challenges. First, students reported lower engagement and more disruptions, on average, than did students who participated in the first learning cycle. The classes in the second learning cycle included 40 or more students. To accommodate such large class sizes, facilitators taught in the school gymnasium and library. Facilitators found that the gym, in particular, had frequent disruptions and poor acoustics. Facilitators observed that a year of virtual learning during the COVID-19 pandemic—combined with the difficult classroom settings—appeared to result in more challenges related to students' focus, attention, and disruptiveness in the classroom, and they wanted to develop skills to support youth self-regulation development and create a supportive classroom environment. Second, co-facilitators reported challenges with classroom management and with communicating with each other during workshops. YFS staff noted that the classroom teachers they worked with were new and they did not yet have strong working relationships with the teachers. Although classroom teachers were present in the classrooms while YFS staff were facilitating, some classroom teachers seemed disengaged and unwilling to help with classroom management.

Learning Cycle 2

November – December 2021

Strategy and Purpose

- **Strategy:** Modified strategy includes a brief daily morning check-in, individual use of debriefing tool, and weekly team debrief
- **Purpose:** Four facilitators lead workshops in a large, urban high school and use tools to support their facilitation

Data

- Session debrief forms (11 forms)
- Notes from team debrief meetings (3 meetings)
- Session exit tickets (1,123 tickets)

Key Takeaways

- Co-facilitators had less time for structured planning and debriefing than they did in the first learning cycle
- Facilitators observed that students struggled to stay focused and distractions were higher in comparison with the first learning cycle
- The workshop environment was challenging and facilitators had difficulty working with classroom teachers
- Immediate student feedback through exit tickets was helpful for debriefing

Considering the second learning cycle, YFS suggested that additional tools would help support strong co-facilitation and student engagement:

- **A conversation guide for setting expectations with classroom teachers.** The master trainer developed a conversation guide for co-facilitators and classroom teachers to discuss classroom management practices and expectations, as well as HMRE curriculum content, to promote a strong working relationship between facilitators and classroom teachers (Box 6.4). In the spring 2022 semester, YFS was planning on facilitating an HMRE workshop in a new school where they had never provided services, so a strong working relationship and clear expectations would be particularly important.
- **Coaching on co-regulation skills to help students develop self-regulation.** Such co-regulation skills help facilitators create a safe and supportive classroom environment and manage their own stress. As part of this strategy, facilitators participated in a training on self- and co-regulation and in four follow-up coaching calls. Each coaching call focused on a different dimension of co-regulation (Described in Chapter 2). In the coaching calls, facilitators discussed specific co-regulation strategies, set individual goals for trying out strategies in the classroom, and related how they felt the strategies they chose to practice had worked and what they could do differently.

These strategies were tested concurrently during the third and fourth learning cycles.

Learning Cycle 3: February–April 2022

The third learning cycle focused on testing the conversation guide for facilitators and classroom teachers. In this learning cycle, facilitators taught at three schools. YFS had a long history with the classroom teacher at the first school. YFS staff and the SIMR team developed an initial list of questions, which they tried out with the classroom teacher at the first school. On the basis of this experience, they revised the guide for use in the second two schools, which included one school where YFS was providing HMRE services for the first time. Both the YFS facilitators and the classroom teachers indicated that they found the guide helpful. One facilitator reported, "[In the past] we've had conversations about how to handle discipline but having it in writing is better because it's an accountability factor—something I wish we would have had at [the school from Learning Cycle 2]. … Here, the teacher was engaged in the right way—involved, but appropriately." The SIMR team interviewed the classroom teacher from the new school. He reported that the conversation guide helped him understand the curriculum content and that it was helpful to meet the facilitators before the workshop began—both he and the YFS facilitators developed a shared understanding of expectations for classroom management.

Learning Cycle 3
February – April 2022

Strategy and Purpose

- **Strategy:** Have a conversation with classroom teachers before beginning a workshop series to set expectations around classroom management and curriculum content
- **Purpose:** Five facilitators have initial conversations with classroom teachers at three rural high schools

Data

- Session exit tickets (243 tickets)
- Classroom teacher conversation guides (2 guides)
- Session debrief forms (11 forms)
- Interview with classroom teacher (1 teacher)
- Facilitator interviews (5 facilitators)

Key Takeaways

- Upfront conversations with classroom teachers helped the teachers and YFS facilitators clarify expectations for each other and review curriculum content

Planning and debriefing strategies continued to be helpful for the YFS facilitators. YFS experienced some turnover between the fall and spring school semesters. After the first learning cycle in the fall, one facilitator left the organization and was replaced in the second learning cycle by an experienced facilitator who split her time between HMRE services and another department within YFS. At the start of the third learning cycle, YFS brought on another new facilitator. With five facilitators, YFS began to switch up the co-facilitator pairs so that they all had experience working with one another. The facilitators felt that meeting regularly as a full team helped them develop a shared understanding of their approaches, resolve challenges as a team, and orient the new facilitator to the team.

Learning Cycle 4: February–April 2022

In the fourth learning cycle, YFS tested co-regulation coaching. Building on the rapid cycle learning conducted with AYRE (Chapter 2), the goal was to find out whether structured coaching could help facilitators adopt a co-regulation mindset, equipping them with additional skills to support and engage students in curriculum content and manage disruptions. In late February, YFS staff attended a three-hour training that covered self-regulation development and co-regulation. Following the training, facilitators participated in four two-hour coaching calls while teaching at two schools. The facilitators selected and practiced different co-regulation strategies in the classroom, such as modeling focused breathing exercises with youth, intentionally welcoming youth to class daily, or providing structured positive praise. In the coaching calls, facilitators received additional in-depth information about the domains of co-regulation, discussed their use of co-regulation strategies, and set individual goals to continue using these strategies before the next coaching call. A co-regulation expert on the SIMR team led the training and coaching calls.

The learning cycle was designed to answer the following question:

How does clear communication between HMRE facilitators and classroom teachers support engagement in school-based HMRE workshops?

Box 6.4. Sample questions in the classroom teacher conversation guide

In the third learning cycle, YFS facilitators used a conversation guide to set expectations about curriculum content and classroom management with classroom teachers. The full guide is in a companion brief, "Strategies to Support Co-facilitation in Classroom Sessions" (Buonaspina et al. 2023). Some questions in the guide are as follows:

1. If or when we have different opinions about curriculum content or research, what is the best way to handle the difference of opinion?
2. When certain behaviors disrupt the group (such as off-topic side conversations or people using their phones), who will intervene? How will we intervene?
3. Are there any ongoing problem behaviors or conflicts within the group that facilitators need to be aware of?
4. If the facilitator would like to enlist the teacher's help, what is a subtle signal to alert the teacher for assistance?

To provide insight into the value of co-regulation coaching, facilitators completed a survey before the training and again at the end of the school semester. The training asked facilitators to rate their self-efficacy and confidence in their ability to manage challenging situations and regulate their own emotions. It also asked them to assess how successful YFS was as an HMRE service provider in establishing a supportive program climate for youth.

The learning cycle was designed to answer the following question:

How does coaching help facilitators practice strategies to support youth self-regulation development and engage youth in HMRE workshops?

Facilitators reported on the survey and in interviews that the strategies they learned through coaching helped them with their own self-regulation while teaching. In an interview, one facilitator shared

an example of a session in which a student made a political statement that the facilitator did not agree with. Using strategies he learned through a coaching call, the facilitator was able to recognize his own strong emotional reaction and consciously modulate it so his personal opinions did not interfere with his teaching of the workshop. In interviews, facilitators reported that the co-regulation coaching was helpful in sharpening their focus on supporting youth in the classroom. Although they had been exposed to co-regulation strategies before the training, bi-weekly coaching helped remind them to practice the strategies consistently and reflect on their experiences. Facilitators reported that the strategies they used most frequently were geared toward establishing warm and responsive relationships with youth, such as intentionally greeting youth every day and providing two-part praise, which included the youth's name and praise for a specific effort or behavior.

The pre- and post-survey results showed that facilitators' confidence grew, not only in their ability to manage challenging situations—dealing with defiant youth, for example—but also in their ability to give socioemotional guidance to youth. This latter pattern was illustrated through facilitators' increased levels of agreement with statements such as, "I talk to youth about their self-regulation development" or "In my lessons, I try to explicitly foster youths' self-regulation development." From the pre-survey to the post-survey, facilitators' average ratings changed from neutral to slightly positive attitudes about their sense of efficacy and ability to give socio-emotional guidance to youth (3.3 and 3.5 on a 5-point scale, respectively) to more positive attitudes (4.0 out of 5 for each scale). Facilitators also rated the YFS program climate higher on the post-survey than on the pre-survey in connection with items such as "Staff show interest in what youth are doing and saying" and "Youth feel accepted by other program participants." Even so, facilitators wanted more practice with strategies to manage their emotions in challenging situations.

Learning Cycle 4

February – April 2022

Strategy and Purpose

- **Strategy:** Participate in training about adolescent self-regulation development and co-regulation strategies and four follow-up coaching calls to practice and reflect on co-regulation strategies
- **Purpose:** Five facilitators participate in training and coaching and practice and reflect on co-regulation strategies in two rural high schools

Data

- Co-regulation coaching session notes (4 sessions)
- Facilitator interviews (5 interviews)
- Co-regulation coaching pre-post survey (5 facilitator responses)

Key Takeaways

- Facilitators reported improvements in their ability to manage difficult situations in the classroom
- Facilitators reported that focusing on their own self-regulation and using co-regulation strategies helped them be better facilitators

What did we learn about strong co-facilitation with YFS facilitators?

Through the SIMR project, YFS built on strong facilitation practices they co-developed and refined through their earlier rapid cycle learning work as part of the STREAMS evaluation. By focusing on intentional planning and debriefing as part of SIMR rapid cycle learning work, YFS hoped that facilitators would be well-prepared to co-facilitate workshops, develop strong working relationships with their co-facilitators and classroom teachers, and learn how to adjust their facilitation approaches on the basis of feedback from their colleagues and from youth. In the spring 2022 school semester, YFS was also able to address additional challenges in implementing HMRE services in high schools through rapid cycle learning. Facilitators extended intentional planning by having a structured planning conversation with the classroom teacher to set expectations before the HMRE workshop began, particularly for classroom management practices. Co-regulation coaching provided additional tools to YFS facilitators to use in the workshop to support youth. In addition, the coaching sessions provided structure for facilitators to plan to use co-regulation strategies and debrief how they worked. Over the course of four learning cycles, we learned that building a practice of regular planning and debriefing is an important component of strong co-facilitation.

The tools that YFS tested and refined through SIMR are broadly applicable for HMRE grant recipients. Planning and debriefing tools and practices have promise for supporting strong facilitation practices and an engaging HMRE workshop for youth.

- **Co-facilitator conversation guide, detailed pre-planning tool, and debriefing tool.** Many HMRE grant recipients use co-facilitators. Making time to plan and debrief workshops together can help them blend their different styles and identify the best ways of communicating and working together during the workshop, with the ultimate aim of helping participants engage with and absorb curriculum content. Facilitators felt that emphasizing planning and debriefing in SIMR ensured that they conducted those activities in a structured and intentional way, even when schedules became more challenging in Learning Cycle 2.

> **If you don't debrief as a teacher [and] don't reflect, your teaching is never going to get better – that was a value that was instilled through this year."**
>
> *—YFS facilitator*

  Exit tickets are an easy, low-burden way to incorporate youth voice into planning and debriefing and into designing engaging HMRE services. Initially, facilitators were concerned that collecting exit tickets after every session would be cumbersome. Later they reported that it became an expected part of class. Facilitators told us they regularly used student feedback to adjust their approach and planned to continue using exit tickets after the end of the SIMR project.

> **The exit tickets were my bread and butter. Every single day, as soon as we left, sometimes before the kids even got out of the room, I'm like, I need to read everything that they wrote, and I want the feedback. I want constructive criticism, and I thrive on the positive feedback. So the little things where they said something that they liked that we did that day, or even what they didn't like, I want that too. How can I do better and be better?"**
>
> *—YFS facilitator*

- **Classroom teacher conversation guide.** A majority of youth-serving READY4Life grant recipients operate in high schools. Typically, classroom teachers are present while grant recipient staff are facilitating HMRE content. Other youth-serving HMRE providers have had difficulty managing classrooms where they have little authority to address problem behaviors from students and do not give grades, or where classroom teachers insert themselves too little or too much into the workshop (see, for example, Baumgartner et al. 2020). YFS facilitators and a classroom teacher both thought talking before the beginning of a workshop set the foundation for a strong partnership. Facilitators found that the guide helped them talk about expectations for classroom management and the classroom teacher's engagement. The classroom teacher felt that the conversation helped him understand the curriculum content better.

> **"There's a benefit to [being] intentional—noticing those things, building rapport … [to] make sure you're doing [a co-regulation strategy] with everyone."**
>
> *—YFS facilitator*

- **Co-regulation coaching.** Coaching offers one promising way to help HMRE facilitators be more explicit and conscious about centering co-regulation in their facilitation. Integrating a focus on co-regulation into youth HMRE workshops has promise: adolescence is an important time for developing self-regulation skills, and healthy self-regulation skills are linked to a range of positive youth outcomes in relationships, academic achievement, and overall well-being (Frei et al. 2021). By participating in co-regulation coaching, facilitators reported that they felt better equipped to support youth in HMRE workshops. The coaching also helped facilitators refine their facilitation skills by bringing more focus and intention to things they already did, like greeting youth warmly when they entered the classroom.

CHAPTER 7

CONCLUSION

In the SIMR project, five READY4Life grant recipients used rapid cycle learning techniques to test and refine strategies to strengthen the implementation of HMRE services for youth and address challenges that grant recipients faced related to recruitment, retention, and content engagement. In order to benefit from HMRE services, service providers must take steps so that youth can access and learn from curriculum content. SIMR had two goals: (1) to improve the service delivery of these grant recipients and (2) to develop lessons for the broader HMRE field about promising practices for addressing common implementation challenges. The SIMR team began working with grant recipients in November 2021 and completed all rapid cycle learning by August 2022. An explicit focus of this work was to provide grant recipients with tools and strategies to continue strong implementation of HMRE services after the conclusion of SIMR, through the end of the grant cycle in 2025.

At the beginning of the project, SIMR team members led grant recipient staff in brainstorming sessions using human-centered design to identify and prioritize the focus of rapid cycle learning. The SIMR team included staff from all levels of the grant recipient organizations in these early meetings to ensure that input reflected a range of perspectives on the most important implementation challenges the grant recipients faced. All of the READY4Life grant recipients were returning HMRE grant recipients. Even so, each faced new challenges while implementing their READY4Life grants (Baumgartner et al. 2022):

- **AYRE** used first-time facilitators, undergraduate students known as near peers, to deliver HMRE content in high schools; AYRE was also delivering a new self-regulation skills curriculum for the first time. In SIMR, AYRE was interested in helping facilitators build skills to help them encourage youth to actively engage in curriculum content.
- **MotherWise** shifted to virtual services during the COVID-19 pandemic. The program also adjusted its service population to serve young mothers younger than 25. In SIMR, MotherWise wanted to develop tools to promote peer relationship development and make virtual services more engaging for its participants.
- **MTCI** aimed to make their case management services more robust than they had been in previous grant cycles. In SIMR, MTCI was interested in using case management sessions to engage youth in and reinforce workshop content.
- **Texas A&M Agrilife** offered the SPY program to a population of young adults. Texas A&M Agrilife's earlier HMRE programming had served adults of any age. In SIMR, Texas A&M wanted to find ways to identify and recruit youth living in rural areas, a service population they to which they had few existing connections.
- **YFS** brought new facilitators onto its team and planned to provide services in several new partner schools. In SIMR, YFS was interested in developing tools and practices for co-facilitators to work together to make workshop content engaging for youth.

Once the key implementation challenges were identified, the SIMR team worked with the grant recipients to develop tailored strategies to strengthen implementation of their services. The SIMR team developed plans with each grant recipient to test these strategies using iterative rapid cycle learning: implementing a strategy over a short time period, collecting and analyzing data, and using insights to make adjustments to the strategy and test again. Grant recipients completed between two and four learning cycles.

Collaboration and co-creation was central to the SIMR approach. The SIMR team contributed insights from research and connected grant recipients to training and experts. For example, **AYRE, YFS,** and **MTCI** embedded evidence-informed strategies into their services to support staff and help students develop self-regulation skills. The SIMR team used principles drawn from implementation science—a body of research about how to successfully implement evidence-based practices (see, for example, Fixsen et al. 2005; Nilsen 2015; Michie et al. 2011)—to ensure that strategies were well-designed.

The grant recipients brought their deep knowledge as practitioners to the partnership to ensure that they tailored strategies to their specific context and service population. Participating in SIMR's structured process helped grant recipients recognize and build on their organizational strengths. For example, the rural recruitment approach **Texas A&M Agrilife** tested in its second learning cycle drew on the knowledge staff developed by living and working in the communities to which they were assigned. Through all three learning cycles, **MotherWise** engaged program staff with experience working with Latina mothers to ensure the virtual engagement strategies they tested were culturally sensitive and accessible to Spanish speakers.

SIMR's influence on the READY4Life grant recipients that participated

By participating in SIMR, grant recipients increased their capacity to collect and use data to inform decision making. For example, **MotherWise** staff conducted their own observations of virtual workshops. Grant recipient staff worked with the SIMR team to create observation forms, providing input on key indicators of workshop engagement. **MTCI** used a case notes template to standardize the way in which case managers tracked information about their meetings with youth, so that the data could be used to assess students' progress toward goal attainment. **YFS** used exit tickets at the end of each workshop session to gather youth feedback on classroom engagement; YFS staff reviewed this feedback in weekly team meetings to learn how they could improve their co-facilitation.

Conducting structured learning cycles with the SIMR team helped grant recipients develop skills for identifying and responding to emerging implementation challenges. Over its first two learning cycles, **YFS** identified two challenges: (1) lack of engagement from classroom teachers and (2) managing disruptive and disengaged youth, both of which the organization addressed in its third and fourth learning cycles. **Texas A&M Agrilife** hoped that Instagram could be used to identify youth in rural areas for SPY, its HMRE service. By tracking how youth learned about SPY, however, the grant recipient found that none had used Instagram to find out about HMRE services. In its second learning cycle, Texas A&M recalibrated its recruitment strategy to focus more on county-specific approaches to direct recruitment and partner engagement.

Overall, the READY4Life grant recipients participating in SIMR strengthened staff capacity and developed tools and strategies to support strong implementation through the rest of the grant period. **YFS** facilitators reported that the co-facilitation tools they tested helped them intentionally practice and reflect upon their use of facilitation strategies. Evidence gathered from facilitators and students participating in the **AYRE** rapid cycle test of an emotion regulation strategy for facilitators suggested that training on this technique helped near-peer facilitators manage stressful situations in the classroom. After **MTCI** worked with the SIMR team to adopt a case management approach informed by research on goal attainment, nearly all students who set goals with a case manager reported making progress toward them over the course of the school semester.

The grant recipients participating in SIMR planned to continue using the strategies they developed and refined with the SIMR team. **MTCI** planned to test a case management approach based on goal attainment in its local evaluation. **YFS** planned to continue weekly planning and debriefing and regular collection of student exit tickets. **MotherWise** planned to keep using the Nest, its phone app, to help

participants connect with other MotherWise families and to use videos to cover skills and difficult curriculum content. In addition, the program planned to expand the use of these newly developed strategies into in-person workshops as the organization returned to providing in-person services.

Insights from this rapid cycle work that can inform other HMRE grant recipients

Through their collaboration as part of SIMR rapid cycle learning, the SIMR team and the five READY4Life grant recipients that participated generated insights and lessons to inform strong service delivery that are relevant to other HMRE grant recipients:

- **Provide supports and tools for facilitators to successfully lead HMRE workshops.** Staff supports such as training, supervision, and organizational changes that make their jobs easier are elements that contribute to strong program implementation (Fixsen et al. 2005). Providing these supports can be challenging for HMRE service providers—particularly those who offer services in multiple locations simultaneously and have limited opportunities to bring staff together. **AYRE** and **YFS** tested strategies to support facilitators by helping them manage sources of stress and plan lessons and debrief lessons. These strategies involved intentionally creating opportunities outside regular classroom time for facilitators to reflect on the HMRE workshop and consider the adjustments they could make. The grant recipients found that supports such as these may be especially helpful for less experienced facilitators. Other HMRE grant recipients that want to support facilitators to lead engaging workshops could consider how to create regular time and space for individual and group reflection on their facilitation.

- **Look for innovative ways to reinforce workshop content.** Reinforcing lessons outside of the classroom and giving youth opportunities to put the skills they are learning into practice can improve their understanding of the content (Claiborne et al. 2020). Several programs participating in SIMR tested strategies to reinforce the relationship skills taught during workshops outside these sessions. **MotherWise** and **Texas A&M Agrilife** found that social media could be a promising tool to reinforce curriculum relationship content for current and former participants. **MTCI** used case management to reinforce key curriculum lessons on goal setting and attainment with youth. Other HMRE grant recipients that want to reinforce workshop content could consider how content reinforcement can occur outside of the core workshop, such as by using social media to engage youth or prompting youth to apply curriculum lessons to their own goals and relationship experiences.

- **Prioritize relationship-building to engage participants.** A supportive environment can help participants feel safe and secure in an HMRE workshop. A sense of safety and security is important because participants are expected to discuss relationships and other personal topics and develop skills to help them foster positive interpersonal relationships and manage their thoughts, feelings, and behaviors (Baumgartner et al. 2020). The grant recipients in SIMR tested and refined multiple strategies for strengthening relationships with participants and promoting a supportive environment. **YFS** and **AYRE** facilitators tested co-regulation strategies to create a supportive workshop environment. The goal attainment approach to case management that **MTCI** used helped case managers form positive relationships with youth and encourage them to set meaningful goals and make progress on them. **MotherWise** used technology in intentional, innovative ways to foster peer relationships in a virtual setting. Grant recipient staff reported that these peer relationships helped form a foundation for an engaging workshop where participants could discuss sensitive topics. Other HMRE grant recipients that want to establish a supportive workshop environment could consider how to make time for relationship development, whether it involves specific activities within workshop sessions or by creating opportunities outside of the core workshop.

The tools and strategies that grant recipients developed provide starting points for other organizations that want to strengthen their own HMRE services. To help make these tools available to other programs, the SIMR team has developed practice briefs—on delivering virtual services, developing recruitment partnerships, and supporting co-facilitators—that share these promising tools in full. Interested organizations can use these tools in their own HMRE services and apply the lessons grant recipients learned through their participation in SIMR.

Any HMRE organization can make its programs stronger by adopting SIMR principles into its own continuous quality improvement (CQI) processes. When confronted with an implementation challenge, bring together a range of staff to define the problem and understand the driving factors. Create tailored solutions informed by evidence and practice, engaging experts where appropriate. Develop a plan to test it on a small scale that includes the question you are interested in answering and the data you plan to collect to measure success. After the test, convene staff to review the data, determine the adjustments that need to be made, and plan to test again.

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Endnotes

[1] As a requirement of their HMRE grants, most HMRE grant recipients partner with an evaluator to conduct an evaluation of their HMRE services, known as a "local evaluation."

[2] There were no co-facilitation pairs where both facilitators participated in T3 training and practice. Co-facilitation pairs included near peers or community facilitators; community facilitators and near peers were not paired.

[3] The success sequence is a theory that suggests youth may be more likely to reach self-sufficiency by achieving a set of milestones related to academic achievement, employment, and marriage before having children (Goesling et al. 2020).

[4] MTCI intended to make case management the focus of its local evaluation. According to its initial plan, two classrooms in each school it served would be randomly assigned to receive support from a case manager. To measure the effect of offering case management, MTCI planned to compare outcomes of youth in classrooms with case managers to outcomes of those in classrooms without them.

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