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Daniel Friend,[1]
Camila Fernandez,[1]
Rebecca Dunn,[1]
Armando Yañez,[1]
Hannah McInerney,[1]
Sheila Cavallo,[1]
Adilia McManus,[2]
Lauren Mattox,[2] and
Scott Baumgartner[1]

[1] Mathematica,
[2] Public Strategies

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

SIMR
Strengthening the Implementation of Marriage and Relationship Programs

SIMR Practice Brief

Tips for Leveraging Partnerships to Improve Recruitment for Healthy Marriage and Relationship Education Programs

Many healthy marriage and relationship education (HMRE) programs and similar programs might struggle to recruit and enroll participants. This is often the first challenge new programs encounter as they move from planning to implementing their services.[1] HMRE services can be unfamiliar to many people, potentially making them reluctant to enroll in HMRE programs. Recruitment can be especially challenging for programs serving hard-to-reach communities with residents who might be "system shy" or distrustful of services because of negative experiences with child support enforcement, immigration authorities, or the justice system — among others.[2]

Because of these challenges, an important component of many successful recruitment strategies is to develop partnerships with other organizations in the community that can refer potential participants to the program.[3] Partnerships with organizations and agencies that are trusted by the community can help programs reach participants.[4] For example, across several evaluations of federally funded HMRE programs, staff reported greater success with recruitment when they had an array of strong community partners that provided regular referrals to their HMRE program.[5]

This brief describes a six-step process to help HMRE programs identify, engage, and strengthen referral partnerships with community organizations (Figure 1). The process was developed as part of the Strengthening the Implementation of Marriage and Relationship Programs (SIMR) project and was informed by research on best practices in recruitment.[6] The process was then tested and refined through rapid cycle learning conducted with three HMRE grant recipients participating in SIMR: Anthem Strong Families, Family Service Agency-Santa Barbara (FSA-SB), and Gateway Community Action.

Mathematica Public Strategies

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It is worth noting that these strategies are promising but not proven. To fit these strategies to their program contexts, HMRE practitioners should test and refine any solutions through ongoing continuous quality improvement and evaluation.

Figure 1. Steps to establishing and maintaining partnerships for program recruitment

What is rapid cycle learning?

Grant recipients in SIMR tested strategies using a rapid cycle learning approach. Rapid cycle learning is a method for quickly and iteratively testing strategies to strengthen programming. It often involves successive cycles to pilot strategies, collect feedback from staff and participants on how these strategies are working, and gather data to demonstrate whether the strategies are supporting improvement. Based on what grant recipients learn, staff can refine and test strategies again in a subsequent learning cycle.

[1] Strong 2022

[2] Benito-Gomez and Flores Rojas 2020; Holcomb et al. 2015; Martinez et al. 2012; Strong 2022

[3] Friend and Paulsell 2020

[4] Friend and Paulsell 2020; Schiff et al. 2021; Valdovinos et al. 2021

[5] D'Angelo and Bodenlos 2020; Dion et al. 2010; Friend et al. 2020; Gaubert et al. 2010; Zaveri and Baumgartner 2016

[6] For example, Atouba 2019; Friend and Paulsell 2020; Giachello et al. 2007; Hogue et al. 1999; Shakesprere et al. 2021

What is SIMR?

Strengthening the Implementation of Marriage and Relationship Programs (SIMR) is a national evaluation overseen by the Administration for Children and Families (ACF), Office of Planning, Research, and Evaluation with funding from ACF's Office of Family Assistance. It aims to strengthen the capacity of healthy marriage and relationship education (HMRE) grant recipients to improve their services by addressing implementation challenges in three core areas:

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

Through SIMR, Mathematica and its partner, Public Strategies, collaborated with 10 HMRE grant recipients (5 that serve adults and 5 that serve youth) to engage in iterative, rapid cycle learning aimed at strengthening grant recipients' services. These grant recipients are funded by the Office of Family Assistance from 2020–2025. Through this work, the team cocreated, tested, and refined promising strategies to address recruitment, retention, and content engagement challenges. The study had two main goals: (1) to improve the service delivery of grant recipients in the study and (2) to develop lessons for the broader HMRE field about promising practices for addressing common implementation challenges.

For more information about SIMR, see the study's project page on the OPRE website.

About the organizations

Anthem Strong Families. This grant recipient is a nonprofit operating in and around Dallas, Texas. Anthem offers HMRE services to individual adults through the Family Champion program. It primarily serves two distinct populations: mothers and young men without children. Family Champion offers workshops in English and Spanish that use the TYRO Family Champion and CORE Communications curricula delivered in 10 weekly, two-hour sessions. Family Champion also offers case management, one-on-one employment services, and optional workshops on job search skills. Anthem operated an HMRE program from 2006–2011 but then paused these services to develop its fatherhood program. In 2020, the Administration for Children and Families awarded Anthem funding to resume its HMRE services. After almost 10 years of not offering HMRE services, Anthem faced a recruitment challenge because it was no longer known in the community for offering these services.

Family Service Agency-Santa Barbara (FSA-SB). This grant recipient is a nonprofit operating in Santa Barbara County, California. FSA-SB offers HMRE services through the Connected Couples, Connected Families program for adult couples and individuals in romantic relationships. The program primarily serves Spanish speakers. The program's primary workshop, offered in Spanish and English, uses the PREP 8.0 and Within My Reach curricula delivered in eight weekly, two-hour sessions. The program also offers case management and additional workshops on parenting and employment services. Connected Couples, Connected Families has faced difficulties recruiting Spanish-speaking men since it began in 2015.

Gateway Community Action. This grant recipient is a nonprofit operating in eastern Kentucky. Gateway offers HMRE services to adult individuals through the Life Elevated program. The organization serves a rural area, and most of its participants have low incomes. The program's primary workshop uses the Within My Reach curriculum delivered in nine weekly, two-hour sessions. Life Elevated also offers case management, a job readiness program, and other employment services. Gateway operated an HMRE program from 2006–2011 but then switched to offering only a fatherhood program. In 2020, the Administration for Children and Families awarded the organization funding to resume its HMRE services. However, similar to the challenge Anthem encountered, Gateway faced a significant recruitment challenge after almost 10 years of not offering an HMRE program.

Step 1. Identify and prioritize a roster of potential partners

To develop referral partners, programs should first identify and prioritize potential partners in the community.[7] To create this initial list, consider adopting a similar process to the one used in SIMR. The SIMR process included these steps:

- **Brainstorm potential partners.** First, HMRE staff should brainstorm organizations in the community that serve a similar population to the one they hope to reach or organizations that have similar program goals. Staff should identify well-known organizations. They should also aim to identify some less well-known ones through internet searches or other strategies.

- **Build profiles of potential partners.** Next, staff should compile basic information about the organizations from their websites and social media accounts. This information should include an organization's mission, population served, and services offered.

[7] McNeish et al. 2019

- **Rank and prioritize the partners.** Finally, program staff should rank organizations based on how well the potential partner organizations fit with the goals and focus of their HMRE program and how likely they are to be engaged recruitment partners. When ranking organizations, consider alignment between their mission statements and the goals of the HMRE program, the services they offer and populations they serve, the proximity of the organization to the HMRE service location, and the organization's size and reputation in the community.

Step 2. Find your connection

Using existing social or professional ties can help establish a connection with potential partners and make them more likely to recognize and value an HMRE program's message.[8] For example, the SIMR team encouraged program staff to begin by exploring their professional or social networks to see if they had an "in" with a potential partner. If program staff do not have a connection, they can explore the partner's website to identify potential points of contact and their contact information. When searching for this information, it is important to think carefully about identifying the right person to contact. Prioritize contacting a staff member who has decision-making authority or access to someone who does. For example, a director of a complementary program at an organization of interest likely makes decisions for the program and has access to other organizational leaders who could help solidify a potential partnership.

After staff identify an initial contact person, they should develop an outreach approach. A best practice in SIMR was to use a variety of tactics to establish initial contact with the identified point person, such as an email followed by a phone call. Persistence and patience are key to successful outreach. Staff should be prepared to reach out multiple times and should not get discouraged if the first (or third) try is not successful.

Step 3. Prepare partner-specific material

After establishing contact with someone at the potential partner organization, staff should set up a meeting to describe the purpose and mutual benefits of the partnership. Programs should plan to have two tools ready before meeting with a potential partner: (1) a pitch intended for potential recruitment partners and (2) a flyer describing their program, tailored for potential recruitment partners.

Perfect your partner pitch. To be persuasive with a potential recruitment partner, it is important to have a clear and succinct message about your program. Your pitch should briefly describe your program's services, who it serves, and its primary goals.[9] People are busy, so your pitch should get to the point quickly. It should also be tailored to the potential partner you will be meeting with. In SIMR, project staff encouraged HMRE staff to take time to thoroughly understand the partner and make the pitch relevant to the context of the partner. The key is to pitch a partnership that is mutually beneficial to both organizations.

[8] Agranoff 2004

[9] Friend and Paulsell 2020

Content to include in a pitch to a potential partner

- Note how your organization and theirs have missions that align and complement one another
- Briefly describe your program, who it serves, and what it aims to do
- Note the key areas where your program and the potential partner's programs share similar goals or service populations
- Paint a picture of how the services provided through each organization can work together and support one another
- Ask the partner leadership and staff what they would like in a partnership
- Close with a specific ask—for example, can you refer 10 people a month or host an HMRE workshop at your location?

Create a partner flyer. A partner flyer is another important tool for engaging potential recruitment partners. This flyer should describe your program and be tailored for potential partners. The partner flyer is a resource to help staff at partner organizations understand what the HMRE program offers, how to promote it, and how to make referrals to it. Unlike promotional material designed for potential program participants, partner flyers communicate information specifically to partner staff about the key aspects of your program and how to refer participants for enrollment. This flyer should resonate with the values and goals of the partner organization. It should complement your partner pitch—HMRE program staff can send the flyer ahead of time to set the stage for the pitch or leave it behind to help partner staff remember the key elements of the HMRE program. To help HMRE programs design their own partner flyers, the appendix provides an example of a partner flyer developed as part of SIMR.

Key components for a partner flyer

- A brief description of the program
- Eligibility requirements, such as income, age, geographic, or other requirements
- Benefits of the program to participants
- Incentives and supports (for example, monetary benefits, child care, or meals)
- Information on how to refer participants

Step 4. Seal the deal

Successful partnerships should be mutually beneficial and documented to ensure a common understanding of how the partnership will function.[10] If an organization is interested in partnering, staff should clearly establish shared expectations. Grant recipients in SIMR specified what they expected from the partner and how the partner could expect to benefit from the partnership. These benefits could include referrals to the partner organization's programs or services, posting each other's social media content, promoting the partner's services in your organization's monthly newsletter to other providers, or providing space for them to market their program at your events. Next, we describe steps HMRE programs used to seal the deal with their recruitment partners. Other HMRE programs might find it useful to follow a similar process to solidify their partnerships.

- **Develop reasonable expectations.** It is important to develop a deep understanding of a potential partner's organization, programs, and needs. This will enable you to have a better picture of their capacity and manage your expectations accordingly. It will also demonstrate that you respect the partner organization's time and effort and value them

[10] McNeish et al. 2019; Stout et al. 2019

as collaborators, which can create a trajectory for success.[11] The SIMR team worked with HMRE staff to focus on building long-term, reciprocal relationships. One step in that process was to set modest referral goals initially when partner capacity was limited. For example, because of the COVID-19 pandemic, FSA-SB staff understood that one of its partners had limited staff capacity to provide referrals. FSA-SB recognized how to make the partnership mutually beneficial by offering the organization personal protective equipment and meeting spaces, and by collaborating on fundraising events.[12]

- **Define referral targets.** Setting a benchmark helps the program and the partner assess progress and adapt expectations. HMRE programs should work with their partner to define a clear benchmark of how many referrals should come from the partner, such as 5 or 10 referrals per month.

- **Define the referral process.** HMRE program staff should define a referral process in collaboration with the recruitment partner. This process should consider the organization's size and staff capacity, and any other organization constraints that might affect the referral process. For example, a partner might prefer a warm handoff, such as referring potential participants by phone and connecting the participants to a person at the HMRE program. Tailoring the process to the partner's strengths and challenges communicates that the HMRE program is a responsive and respectful partner.[13] In defining the process, it's important to identify the key steps required for a referral to become a successful enrollment and determine which staff in both organizations will carry out each step. Providing clear guidance and assigning responsibility enables both organizations to quickly diagnose problems and make course corrections.

- **Consider formalizing the partnership.** After discussing what the partnership will look like, consider asking the leaders at the partner organization if they would be willing to sign a document that memorializes the agreement to solidify the partnership (for example, a letter of agreement or memorandum of understanding). The document can serve as a written reminder of the roles and responsibilities of each organization in the partnership, establish expectations, and provide a framework for ongoing monitoring and assessment.[14] This approach can help protect the partnership agreement against the disruption of any changes in staffing or leadership at the partner organization.

Step 5. Equip partners with the right tools

After solidifying the partnership, HMRE program staff should ensure that staff at the partner organization have the knowledge and resources to provide appropriate referrals. The SIMR team encouraged grant recipients to conduct a brief training session for partner staff that describes the HMRE program and the referral process. A training session of this sort will help staff at the partner organization deliver recruitment messages on behalf of the HMRE program and refer people who are likely to be a good fit.[15] This training can provide partner staff with descriptions of the HMRE program services, who is eligible for the program, and the benefits participants might experience if they enroll. It might also be beneficial to have partner staff develop their own elevator pitch about the HMRE program during the training session. Program staff should ensure this pitch is accurate by providing constructive feedback and suggestions on what aspects of the program to emphasize. The

[11] Giachello et al. 2007; Shakesprere et al. 2021

[12] OFA-funded programs should consult with OFA to understand limitations regarding participating and hosting fundraising events.

[13] Beal 2012; McNeish et al. 2019

[14] Lin et al. 2020

[15] Ainsworth et al. 2013; Jagosh et al. 2015; Schiff et al. 2021

training session should also review the referral process and answer any questions from partner staff. In SIMR, grant recipients also used the partner flyer as a way to reinforce the important elements of the HMRE program and referral process.

Examples from SIMR on equipping partner staff to provide referrals

HMRE program staff can use multiple strategies to equip staff at partner agencies to tell potential participants about the program and refer appropriate participants. Here are two examples of how HMRE grant recipients in the SIMR project equipped their partners to make referrals effectively.

- **Deliver the right message.** HMRE program staff participating in SIMR provided follow-up guidance to ensure recruitment partners delivered the right message about their HMRE programs. For example, FSA-SB noticed that one of its partners was emphasizing participation incentives (for example, meals, child care, and the transportation subsidy) rather than the key benefits of the program (for example, improving communication and strengthening family bonds). The FSA-SB team felt that emphasizing the benefits of the program could be more effective at recruiting participants than emphasizing incentives. Therefore, in subsequent check-ins with that partner, the FSA-SB team modeled how to message the program to clients, focusing on the benefits of the program and placing less emphasis on program incentives.
- **Create visually appealing flyers for partners that illustrate key program features.** HMRE grant recipients participating in SIMR used partner flyers to concisely communicate key program features. The flyers included clear headlines; high-quality, culturally appropriate images; and contact information for intake staff. For example, Gateway's partner flyer (included as an appendix to this brief) showed key information about program requirements and reminders about why the partnership was important, so partners could easily refer to it when needed. FSA-SB's partner flyer also detailed the mode and length of the classes. These flyers helped partners communicate why they were recommending the program to participants and where classes would take place.

Step 6. Maintain partnerships

As those working in the HMRE field know, partners need to demonstrate commitment to one another over time to ensure the relationship stays strong.[15] The experience of the HMRE programs that participated in SIMR reveal three important priorities for maintaining partnerships:

- **Communicate regularly.** Regular, transparent communication is a key element in maintaining partnerships.[16] After formalizing the partnership, HMRE programs and their partners should create a plan for maintaining the partnership through regular check-in meetings or another method. Grant recipients in SIMR sent emails to partners to document the number of referrals received each month, held biweekly in-person meetings with them, and put partners on distribution lists to receive the HMRE program's newsletters and other communications. HMRE program staff also invited partner staff to observe a class or workshop and experience the HMRE program firsthand.

- **Build trust and show appreciation.** Strong partnerships are built on foundations of trust, appreciation, and recognition.[17] To build trust, HMRE practitioners should consistently follow through on all commitments to their partners.[18] Expressions of appreciation might further strengthen partnerships. In SIMR, grant recipients showed

[15] Ainsworth et al. 2013; Jagosh et al. 2015
[16] Bonner et al. 2017; Burnette and Sanders 2014; Jagosh et al. 2015; Schiff et al. 2021
[17] Giachello et al. 2007; Jagosh et al. 2015; McNeish et al. 2019; Shakesprere et al. 2021
[18] Ainsworth et al. 2013; Burnette and Sanders 2014; Jagosh et al. 2015; Lin et al. 2020

appreciation for their partners' efforts by letting them know how their referrals were helping the HMRE program. They shared success stories about referred clients informally during meetings or through newsletters or social media. One HMRE program sent thank-you cards to recognize the support of its partners and shared success stories about the referred participants.

- **Be proactive about maintenance.** To be proactive, HMRE programs need to regularly take stock of partnerships by assessing their current level of engagement with the HMRE program. This ongoing assessment has two purposes. First, it helps determine which partners are generating substantial numbers of high-quality referrals, which can help clarify appropriate next steps. Second, the assessment creates a baseline to track partnership progress over time. Tracking progress can help focus an HMRE program's efforts related to partner development. Tracking progress can help focus an HMRE program's efforts related to partner development. Table 1 depicts five increasing levels of partner engagement and some suggested steps that could help increase buy-in or the level of collaboration.

Table 1. Partners' levels of engagement

Partner level	Prospective partners	Resource partners	Willing partners	Supportive partners	Engaged partners
Definition	Partners in your community whose participant population is similar to the population of your own program but who do not have an existing relationship with your organization or HMRE program	Partners who do not typically send referrals but do support your program in other significant ways—for example, by providing a service to your HMRE program participants	Partners who are interested in your program and send referrals occasionally	Partners with a strong interest in your program who regularly refer participants	Partners who have an advanced understanding of your program and regularly refer participants who are a good fit
Next steps to take to strengthen partnership	Identify links between your mission and theirs and establish mutual benefits of collaborating	Recognize the ways the partner is helping your HMRE program and explore ways it can refer potential participants	Assess the capacity and fit of the partner to support your recruitment goals. Build trust and establish a low-burden referral process	Maintain regular communication, track progress of referrals, and assess progress toward shared goals	Maintain regular communication, track progress of referrals against benchmarks, and recognize progress toward shared goals

Note: These levels of engagement are informed by guidance on partner development (Giachello et al. 2007; John Snow Inc. 2012; Saleh et al. 2022; Shakesprere et al. 2021).

To assess the level of engagement of partner organizations, HMRE programs could consider using two simple tools, similar to the ones used by the programs participating in SIMR.

- **A partner tracking sheet** maintained in a simple spreadsheet can enable HMRE program staff to document their communications and interactions with the partner and track the number and fit of the referrals received from each partner organization. The tracking should contain contact information, the last contact attempt and its outcome, information on the number of program enrollments from this partner each month, and other relevant information.
- HMRE programs can develop and send a **brief partner survey** to staff at the partner organizations, asking for their perception of the quality of the partnership and their satisfaction with the services offered by the HMRE program. This feedback from partners can illuminate how the partner feels about the relationship and generate ideas to improve or enhance it.

Considerations

This brief describes a six-step process that HMRE or other practitioners might consider implementing to develop and enhance their referral partnerships. These steps are evidence informed, but they were developed for the specific context of the grant recipients in SIMR. To use them, HMRE practitioners should think carefully about the needs and challenges of their service populations and staff, and adapt as necessary. Involving staff in developing the strategies is important to getting them on board and invested in the strategies.

More information about the SIMR study and findings from other SIMR sites in the full reports for the study, additional practice guides, and a digital essay. These resources are available on the Office of Planning, Research, and Evaluation SIMR web page.

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Submitted to:
Office of Planning, Research, and Evaluation
Administration for Children and Families
U.S. Department of Health and Human Services
330 C Street, SW
Washington, DC 20416
Attention: Samantha Illangasekare and
Rebecca Hjelm, Project Officers
Contract Number: HHSP233201500035I/75P00119F37045

Submitted by:
Mathematica
1100 First Street, NE, 12th Floor
Washington, DC 20002-4221
Phone: (202) 484-9220
Fax: (202) 863-1763
Project Director: Robert Wood
Reference Number: 50898

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Appendix: Gateway's Partner-Specific Flyer

LifeElevated
Gateway Community Action
Empowered. Encouraged. Elevated.

PARTNER WITH US

RELATIONSHIPS AND FINANCES

- 18hr Core Class (Relationships and Financial)
- Additional Learning Opportunities (Job Readiness and Parenting)

- **This program provided by Gateway Community Action is at NO COST to our partners.**
- **These courses are free and available to all individuals, couples, and married couples.**
- **All participants must be 18 years of age and all classes must be completed to receive gift card incentive.**
- **In-Person and Virtual Classes are provided.**

Within My Reach (Relationships)

- Precise Decision Making
- Smart Communication
- Understanding Commitment
- Step-Families and Co-Parenting

NEFE (Financial)

- Money Management
- Borrowing (Loans)
- Learning Credit
- Insurance Choices

Why are you so important to us?

We see value in our partners' role in expanding our program! You will be a huge part of:

- Helping create a better workplace environment by strengthening employee home lives.
- Strengthening communication within the community.
- Actively furthering financial education for individuals.
- Insuring that lives are empowered, encouraged, and elevated.

GATEWAY COMMUNITY ACTION

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FOR MORE INFORMATION:

Scan our QR code or visit our website
gatewaycaa.org/family-services/life-skills/

CONTACT:
Program Manager-Brian Peck

- Email: brian.peck@gatewaycaa.org
- Phone: (606)-743-3133 ETX: 4119