



# Learning to Enhance Strategies for Coaching Families Virtually: Lessons from Iowa’s Family Development and Self-Sufficiency Home Visiting Program

Michelle K. Derr, Ryan Ruggiero, Lorie Easter, Page Eastin, and Ella Gifford-Hawkins

The global COVID-19 pandemic created a unique set of conditions requiring state, local, and tribal Temporary Assistance for Needy Families (TANF) programs and other human services agencies to rapidly change how they provide services. Program leaders and direct service staff across the country have shown resilience and unprecedented creativity in shifting from in-person to virtual services among other changes. One such program that made the shift to virtual service delivery was Iowa’s Family Development and Self-Sufficiency (FaDSS) program, which is a comprehensive, statewide home visiting program that provides employment-related coaching to families with low incomes who receive TANF and face complex challenges to employment. FaDSS is currently a site in the Employment Coaching for TANF and Related Populations Study funded by the Office of Planning, Research, and Evaluation (OPRE), within the Administration for Children and Families (ACF) (see [FaDSS Program Snapshot](#)).

The FaDSS leadership team wanted to learn how the program coordinators and family specialists adapted to providing services virtually and how those changes influenced the families they serve.

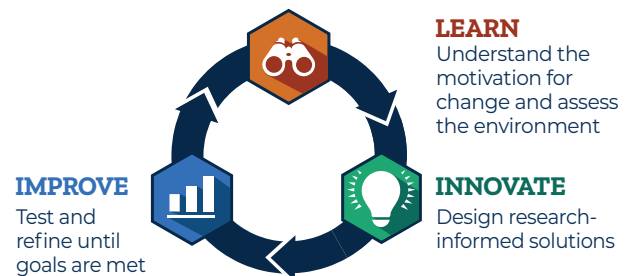
To better understand the shift to virtual service delivery, the leadership team used [Learn, Innovate, Improve](#) (LI<sup>2</sup>) – an approach that practitioners can use to support rapid change and continuous improvement, building data-driven reflection into the process of refining and testing solutions (see Figure 1).

They were supported in this effort by Mathematica and The Adjacent Possible (TAP) as part of the Supporting Partnerships to Advance Research and Knowledge (SPARK) project, which is funded by OPRE (see note).

**Figure 1. Three phases of LI<sup>2</sup>**

**The LI<sup>2</sup> process**

Testing leads to continuous learning and further innovation



Note: Project SPARK, sponsored by the Office of Planning, Research, and Evaluation in consultation with the Office of Family Assistance—both part of the U.S. Department of Health and Human Services, Administration for Children and Families—aims to bridge the gap between research and practice. Project SPARK is designed to help state and county TANF programs and related organizations build their evaluation capacity through technical assistance, with the goal of helping organizations strengthen employment services and improve outcomes for children and families.

**In this brief, we focus on the first phase of the LI<sup>2</sup> process – the Learn phase (see Box 1) — and describe how FaDSS used a systematic approach to assess the successes and challenges they faced when implementing virtual service delivery and how they might use what they learned to improve the quality of coaching in the future.** Drawing on FaDSS’ experiences, this brief aims to help other practitioners learn how to incorporate data-driven reflection into their work using LI<sup>2</sup>. In this brief, we outline the steps FaDSS engaged in throughout the Learn phase and also highlight lessons and best practices the team learned.

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### **Box 1. What is Learn, Innovate, Improve?**

LI<sup>2</sup> is both a framework and a process model, grounded in implementation science, that helps practitioners unpack program challenges, develop evidence-informed solutions, and use analytic methods to gather data to assess the success of a solution (Derr 2022). The approach is grounded in four principles—cocreation (researchers and practitioners working in partnership), evidence-driven (using and building quality evidence to make decisions), iteration (fast-cycle, iterative approach to change), and impact (building capabilities of people and organizations to improve outcomes). These principles are well-aligned with the elements of equitable evaluation (Public Policy Associates 2015). ▲

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### **The Learn Phase: Understanding how virtual coaching met the needs of FaDSS families**

In March 2020, public safety measures instituted in response to COVID-19 forced the FaDSS program (see Box 2) to cease in-person home visits and shift to providing virtual services. A year later, the FaDSS leadership team wanted to understand how well virtual coaching was meeting the needs of families and understand whether families may want a mix of remote and in-person coaching options in the future.

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### **Box 2. FaDSS: Supporting families through home visits**

For more than 30 years, the Family Development and Self-Sufficiency (FaDSS) program has been providing home visiting coaching to Iowa TANF families with complex service needs. The program’s goal is to improve the economic self-sufficiency and stability of families with low incomes. The Iowa Department of Human Rights oversees FaDSS, contracting with 17 government and nonprofit organizations across the state. Local providers hire a FaDSS coordinator, who manages their local program, and between 2 and 10 Certified Family Development Specialists (family specialists), who work directly with families. Central to the model are regular home visits, in which family specialists consider the holistic needs of the family and use a strengths-based, goal-focused coaching approach to work with them. FaDSS serves about 2,200 families per year. ▲

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Before making a decision about this, the leadership team used the Learn phase as an opportunity to understand how FaDSS specialists adapted during COVID-19—the problems they faced using virtual coaching and their possible solutions—and how FaDSS families experienced these services. The leadership team’s ultimate goals were to redesign FaDSS to include a mix of remote and in-home coaching that is aligned with their model and performance standards.

The objectives of the Learn phase of LI<sup>2</sup> are to gather information to: (1) identify, clarify, and prioritize problems; (2) assess the environment to gauge the organization’s and team’s readiness for change and identify factors and people that might influence the change process or the success of the solution; and (3) identify and mobilize key partners who provide input throughout the LI<sup>2</sup> process. These steps equip program leaders to make collaborative, evidence-driven decisions as they craft potential solutions during the next phase, the Innovate phase. LI<sup>2</sup> includes structured activities and tools to support practitioners as

they complete the Learn phase. In practice, the sequencing is typically nonlinear and activities are adapted to meet the needs of the program based on its specific goals, context, and resources.

The FaDSS leadership team, in partnership with Mathematica and TAP, took several steps to execute this reflective phase of the work, including:

### **Narrowed their focus**

The team set out with a broad agenda for improving the quality of FaDSS. After reflecting on all their interests, they narrowed their focus to how specialists were connecting with families virtually and how the quality and frequency of services compared to the model prior to the pandemic. They were curious whether a hybrid model that combined virtual and in-person services might increase the number of connections between specialists and families; increase the efficiency of services, particularly for specialists conducting home visits in rural areas; and improve the quality of services since it is more tailored to families' needs (for example, conducting virtual check-ins for parents who are working). Based on what they learned, they planned to redesign and test services once specialists could conduct home visits in person again.

### **Identified and mobilized key partners**

Identifying and engaging diverse voices brought needed expertise and lived experience of those who operated and participated in virtual services and those involved with home visits prior to the pandemic. The FaDSS leadership team reached out to their existing network of providers, coordinators, and specialists and added families who had experience as FaDSS service recipients. Each was given equal weight as contributors in sharing their experience. However, the FaDSS leadership team ultimately had decision-making authority.

### **Created and executed a plan for gathering feedback**

The FaDSS leadership team developed a plan for engaging with partners and collecting data as part of the Learn phase. Starting with clear objectives provided direction and purpose for the elements that followed—the data collection approach and methods, key respondents, timing and sequencing of activities, and data collection instruments. The FaDSS team members took a comprehensive and iterative approach in designing a data collection plan, adapting the number and types of data collection activities as they reflected on findings from each activity. Data collection lasted about three months, from January to April 2021, and included a mix of surveys with program coordinators, family specialists, and participants; human-centered design sessions with program coordinators and family specialists; and in-depth telephone interviews with participants (Box 3).<sup>1</sup>

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#### **Box 3. Learn phase data collection**

Data were collected between January and April 2021 and included:

- Electronic surveys of 16 FaDSS coordinators, 69 family specialists, and 62 families
- Three 60-minute virtual human-centered design sessions with 65 family specialists (total) \*
- One 60-minute virtual human-centered design session with 17 coordinators \*
- Seven in-depth telephone interviews with families receiving FaDSS services

\* These data collection sessions generated more than 1,400 virtual sticky notes. ▲

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<sup>1</sup> Human-centered design is a philosophy and set of practices that puts people at the center of innovation and program change. It draws upon the principles of empathy, co-creation, and iteration, among others (Liedtka et al. 2017).



### Shared findings with partners

Finally, the FaDSS leadership team held statewide sessions with coordinators and family specialists to share findings and reflections and introduce potential policy recommendations based on the results (Box 4). This marked the end of the Learn phase of LI<sup>2</sup> and the transition to the Innovate phase. During the Innovate phase, they set out to define evidence-informed solutions to the challenges they identified during the Learn phase. This includes developing a theory of change (or road map for change) that specifies a hybrid virtual and in-person coaching approach.

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#### Box 4. Learn phase findings

When home visits are safe, families want in-person home visits or a hybrid of in-person and virtual visits.

- Virtual visits increase the number of contacts with families and make visits easier to schedule
- Many families lack access to technology or an Internet connection
- Virtual coaching limits the ability of family specialists to engage all family members, as they can in home visits
- Formal assessments were more difficult to complete virtually because of signature requirements and the lack of interaction with the family members in their environment
- Respondents recommended staying with in-person visits, with flexibility and guidance for when and how to use remote visits. ▲

### Lessons from the Learn phase process

The FaDSS leadership and evaluation support team discovered several lessons and related good practices through engaging in the information gathering (Learn) phase. Overall, the FaDSS leadership team valued the process and plan to expand their use of LI<sup>2</sup> methods and practices moving forward. Lessons from the process that can apply to change processes at other organizations include:



#### Solicit input from people with lived experience with the program—both staff and participants

The FaDSS leadership team recognized the importance of creating a more inclusive approach to gathering feedback by drawing from diverse perspectives (coordinators, family specialists, and families) and using multiple methods (surveys, human-centered design sessions, and in-depth interviews). This data collection approach, combined with engaging staff virtually to interpret the findings, helped the FaDSS leadership team feel confident in moving toward potential solutions.<sup>2</sup>



#### Trust the process—it will uncover the actual problems to solve

The information gathering phase helps practitioners identify the actual problems instead of the perceived ones, prioritize the problems, and then generate responsive solutions. The FaDSS leadership team began the process with a general sense of the problems they wanted to address within remote and in-person home visiting, but finished with a more refined, prioritized list of problems in which they flagged areas to explore at a later date. For example, FaDSS leaders learned that most families and family specialists prefer in-person visits, but that virtual visits are a good alternative in cases of inclement weather or sickness (Box 5). At the end of the information gathering phase, one leader shared,

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<sup>2</sup> The practice of using multiple sources of data or multiple methods for collecting the data is commonly referred to as “triangulating” the data. It is used to improve the credibility of the findings.

“I felt so much more confident in the policy we wrote and presented on, because it was so well-thought-through and had input from all of the stakeholders.”



### Recognize opportunities for broader learning

The Learn phase is exploratory in nature. Yet, maintaining focus is critical to keep the process doable. Striking the right balance between exploration and focus during the Learn phase is more art than science. When successful, it creates opportunities to catalogue additional problems to solve without derailing data collection and analysis. For example, in conducting the Learn phase, the FaDSS leadership team found that some of their performance standards were outdated and, at times, inhibiting rather than supporting quality practice. This created an opportunity for their team to address some of the challenges specific to the performance standards while staying on track with their original task—designing a hybrid virtual and in-person coaching model.

## Conclusion

LI2 is one model that leaders of human service and workforce agencies might use to engage in a process for evidence-driven change and continuous improvement rooted in a participatory approach. What sets this model apart is the explicit focus

on using and building evidence, drawing upon analytic tools and processes that are accessible to people with limited experience with research. The end goal is to improve outcomes for programs and participants. As one FaDSS leader shared, “When public agencies engage in this kind of learning, you truly do get a better result. You get better outcomes for what you’re working towards.” Using these methods over time can strengthen the analytic capabilities of organizations and leaders to make evidence-driven decisions that improve lives.

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**Project Officers:** Victoria Kabak

**Project Monitors:** Amelie Hecht and Emily Ross

Office of Planning, Research, and Evaluation

Administration for Children and Families

U.S. Department of Health and Human Services

**Project Director:** Diana McCallum

Mathematica

1100 First Street, NE, 12th Floor

Washington, DC 20002-4221

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