



Developing Strategies to Address Implementation Challenges Facing Healthy Marriage and Relationship Education Grantees

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

February 2022

Scott Baumgartner, Daniel Friend, Robert G. Wood, Annie Buonaspina, and Hannah McInerney

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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- The authors

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Overview

To be successful, Healthy Marriage and Relationship Education (HMRE) grantees need to design and implement services that keep their participants and potential participants engaged from initial contact through service completion. However, encouraging participants to continue making progress in HMRE services can be challenging. Common challenges for HMRE grantees related to participants' journeys through programming stem from a variety of causes and often fall into three broad areas: (1) recruiting adequate numbers of participants, (2) encouraging participants to attend workshop sessions regularly and complete services, and (3) providing content that is engaging and relevant for participants. Based on a review of impact and implementation research, researchers have theorized that improved outcomes could result from implementing and strengthening activities related to challenges in these three areas (Friend et al. 2020).

The Strengthening the Implementation of Marriage and Relationship Programs (SIMR) project is designed to strengthen the capacity of HMRE grantees to help the youth and adult populations they serve, specifically by supporting HMRE grantees to address common implementation challenges. The project aims to identify key implementation challenges facing HMRE grantees and, in close collaboration with HMRE grantees and their staff, develop and test strategies to address them using rapid-cycle learning techniques. Through this work, SIMR will also develop lessons for the broader HMRE field about promising practices for addressing common implementation challenges.

Grantees are working with the SIMR team to implement rapid-cycle learning using the Learn, Innovate, Improve (LI²) framework. LI² is an analytic and science-based approach to managing change that draws on implementation science, human-centered design, and iterative rapid-cycle learning to identify and address implementation challenges (Derr et al. 2017). Throughout the three phases of LI², researchers collaborate with practitioners to identify the root causes of a challenge (Learn); create innovative program improvement strategies that are human-centered, informed by science, and sustainable (Innovate); and test and refine strategies using rapid-cycle learning methods (Improve). SIMR participants conducted the Learn and Innovate phases between April 2021 and September 2021.

This report describes the design of the SIMR study and how grantees are using LI² to design and test strategies. This report has been generated to provide an update on the study's activities, to promote transparency, and to disseminate promising approaches to other HMRE projects. Ten HMRE grantees—five serving adults and five serving youth—are participating in SIMR. They represent a mix of grantees serving adult couples and individuals and youth in school-based and community settings. They serve a diverse range of participants, including pregnant and parenting youth, Spanish-speaking couples with low-incomes, and people involved with the criminal justice system. They operate in a variety of settings across the country that include both urban and rural areas. Five grantees (four adult-serving and one youth-serving grantee) are working with the SIMR team to address recruitment challenges, such as encouraging male partners to enroll in services designed for Spanish-speaking couples and recruiting people with romantic partners who are incarcerated. Three youth-serving grantees are addressing content engagement challenges, such as co-facilitating large workshops and reinforcing curriculum content with school-based case management. Two grantees (one youth-serving and one adult-serving grantee) are addressing retention and content engagement challenges by developing high-quality virtual versions of their services, which they began providing during the COVID-19 pandemic. Grantees will test and refine these strategies using iterative rapid-cycle learning through September 2022. A final report from the SIMR study will compile findings across the learning cycles that grantees will conduct over the next year.

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Introduction

To be successful, Healthy Marriage and Relationship Education (HMRE) grantees have to design and implement services that keep the participants they want to serve engaged from initial contact through service completion. But encouraging participants to continue making progress in these services can be challenging. Common challenges for HMRE grantees related to participants' journeys through programming fall into three broad areas: (1) recruiting adequate numbers of participants, (2) encouraging participants to attend workshop sessions regularly and complete services, and (3) providing content that is engaging and relevant for participants. To address these implementation challenges and strengthen the capacity of HMRE grantees to help the youth and adult populations they serve, the Office of Planning, Research, and Evaluation (OPRE) within the Administration for Children and Families (ACF), with funding from the Office of Family Assistance (OFA), has contracted with Mathematica and its partner, Public Strategies, to conduct the Strengthening the Implementation of Marriage and Relationship Programs (SIMR) project. The project aims to identify key implementation challenges facing HMRE grantees and, in close collaboration with HMRE grantees and their staff, develop and test strategies to address those challenges using rapid-cycle learning techniques.

Recruitment, retention, and content engagement challenges stem from a variety of causes. For example, prior research has shown a narrowly defined service population, ineffective recruiting practices or strategies, a lack of strong community partnerships, or a cumbersome intake process can all pose recruitment challenges and eventually limit enrollment in services (Baumgartner and Paulsell 2019; Baumgartner and Zaveri 2018; Dion et al. 2010; Gaubert et al. 2012; Zaveri and Baumgartner 2016). Though research on youth-serving grantees is limited, grantees serving youth in community settings (typically those ages 18 to 24) can experience similar challenges as grantees serving adults. For grantees serving youth in schools, difficulty establishing partnerships with schools can hamper recruitment and enrollment. Providing services during the regular school day can help grantees maintain strong participation, but disruptions during the school day, such as assemblies, can affect content delivery.

What is the Healthy Marriage and Responsible Fatherhood program?

Since 2005, The Office of Family Assistance (OFA) at ACF within the U.S. Department of Health and Human Services has funded the Healthy Marriage and Responsible Fatherhood (HMRF) program. OFA is currently providing five-year grants to organizations providing group-based HMRE services to adult couples, adult individuals, and/or youth, under two Funding Opportunity Announcements:

- **FRAMEWorks** grantees serve adult couples or individuals.
- **Ready4LIFE** grantees serve youth (defined as individuals ages 14 to 24) in school or community settings.

The HMRF program also funds Responsible Fatherhood (RF) programs that provide services to fathers to promote healthy relationships, responsible parenting, family well-being, and economic security.

SIMR's focal implementation areas

1. **Recruitment:** What are the best strategies to reach out to and enroll members of the population a grantee wants to serve?
2. **Retention:** What steps should a grantee take to ensure participants consistently attend and complete services?
3. **Content engagement:** How can a grantee sustain participants' interest and attention during activities and services?

Previous evaluations of HMRE grantees, including large, federally-sponsored studies such as Parents and Children Together, Supporting Healthy Marriage, and Building Strong Families, have produced mixed results, with several grantees shown to have modest, positive improvements related to relationship quality and status (Hawkins et al. 2008; Hsueh et al. 2012; Lundquist et al. 2014; Moore et al. 2018; Wood et al. 2010; Wood et al. 2012; Alamillo and Goesling 2021; Patnaik and Wood 2021). Based on a review of impact and implementation research, researchers have theorized that improved outcomes could result from implementing and strengthening activities related to recruitment, retention, and content engagement (Friend et al. 2020). Examples of these activities include identifying an intended service population and recruitment methods to reach them; engaging participants with a curriculum that is evidence-based and tailored to the service population; and maximizing attendance through participation supports, reducing barriers, and strong facilitation.

Common implementation challenges facing HMRE grantees

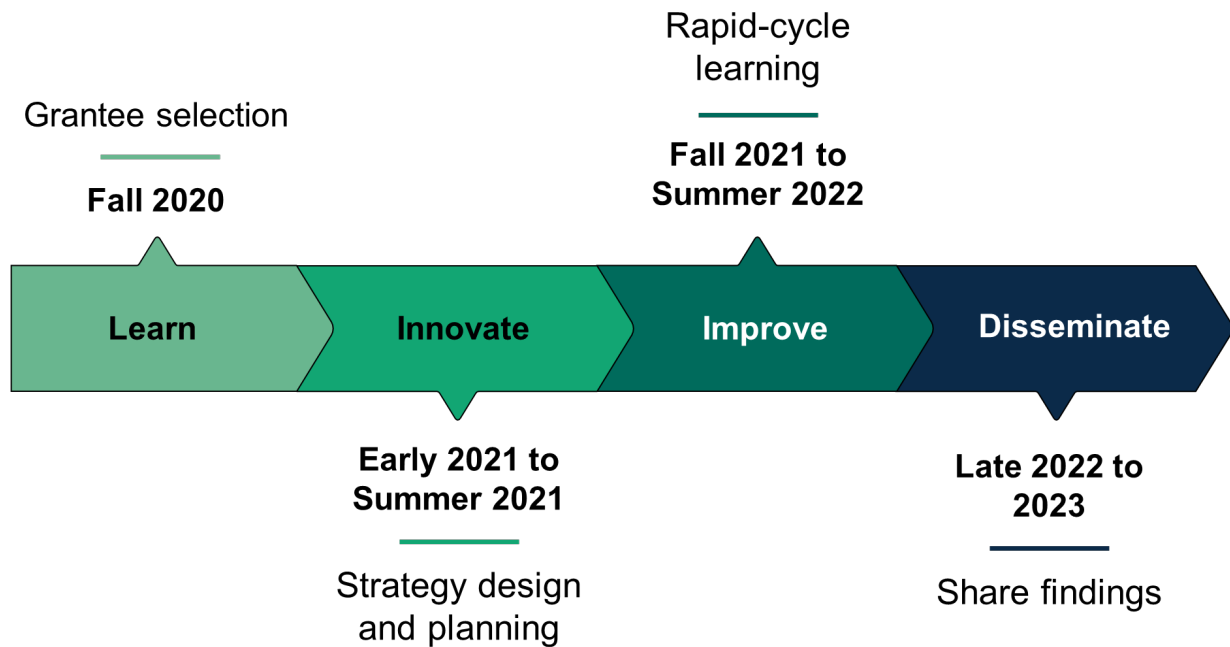
The SIMR team conducted a review of peer-reviewed literature, HMRE federal study reports, and grantees' performance data, and held discussions with federal staff and HMRE experts and stakeholders to identify common implementation challenges related to recruiting and retaining participants and developing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

- **Recruitment challenges** included ineffective recruitment partnerships, ineffective recruitment strategies or marketing, failure to have services appeal to potential participants or address their concerns, and participants' logistical barriers to enrollment. Specific to grantees serving youth in schools, recruitment challenges included getting parents' buy-in and developing relationships with schools.
- **Retention challenges** included participants' barriers to participation, difficulty motivating participants to attend, and ineffective incentive and make-up session structures. Specific to grantees serving youth in schools, school disruptions, parental buy-in, and lack of accountability for participation (such as grades) 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.

In SIMR, Mathematica and its partner, Public Strategies, are collaborating with 10 HMRE grantees to conduct iterative rapid-cycle testing aimed at strengthening their services. Through this work, we will co-create, test, and refine promising strategies to address recruitment, retention, and content engagement challenges. SIMR has two main goals: (1) to improve the service delivery of these grantees and (2) to develop lessons for the broader HMRE field about promising practices for addressing common implementation challenges.

SIMR is unfolding over two years (Figure 1). Year 1—September 2020 through September 2021—has focused on identifying implementation challenges, developing innovative strategies to address them, and planning for rapid-cycle learning. Year 2—October 2021 through September 2022—will focus on conducting iterative rapid-cycle learning to strengthen grantees and assess the success of program improvement strategies. These cycles will typically last one to three months. At the end of each cycle, the SIMR team will meet with grantee staff to take stock of how the strategy is performing and determine how to refine it for future learning cycles or pivot to address other emerging challenges.

Figure 1. Timeline for the SIMR project



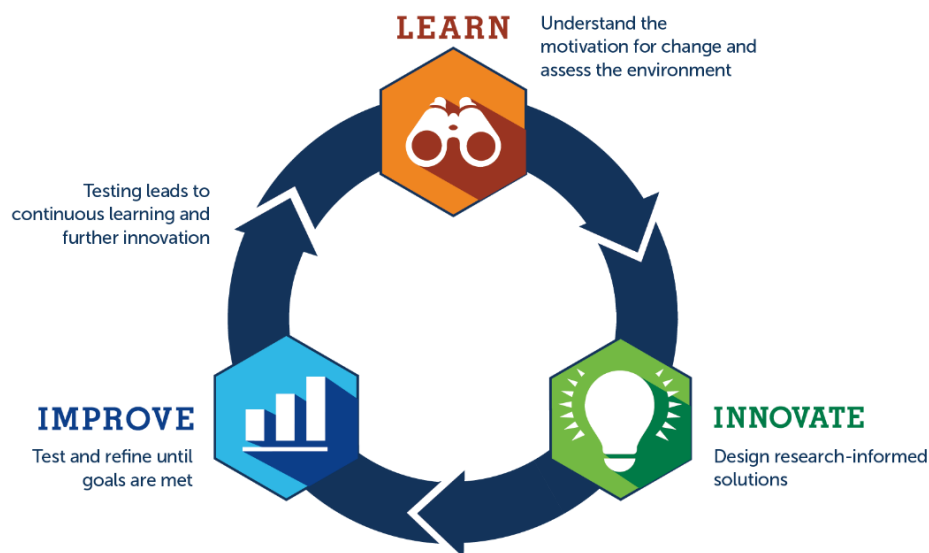
Planning for Rapid-Cycle Learning: The Learn and Innovate Phases

The Learn, Innovate, Improve (LI²) framework guides program-strengthening work in SIMR (Figure 2). LI² provides an analytic and science-based approach to managing change (Derr et al. 2017). Mathematica and its partners developed LI² to bring researchers and practitioners together to generate and use evidence for problem solving and program improvement. Throughout the three phases of LI², researchers collaborate with practitioners to identify the root causes of a challenge (Learn); create innovative program improvement strategies that are human-centered, informed by science, and sustainable (Innovate); and test and refine strategies using rapid-cycle learning methods (Improve).

Learn, Innovate, Improve

LI² is a framework for program improvement and managing change developed by Mathematica and OPRE in collaboration with the Harvard Center on the Developing Child. It draws on implementation science, human-centered design, and iterative rapid-cycle learning to identify and address implementation challenges.

Figure 2. The LI² framework



- 1. Learn: Identify the root cause(s) of a challenge.** We worked with participating grantees to systematically identify the factors contributing to the specific implementation challenge they would like to address, including factors at the participant, grantee, and community levels. Our initial work with the grantees in SIMR focused on building a common understanding of each grantee's context and the needs and circumstances of the population the grantee aimed to serve. This process is essential to developing a sustainable, lasting, and meaningful change.
- 2. Innovate: Co-create potential strategies to address implementation challenges.** Service delivery improvements are unlikely to be sustainable if grantee staff do not feel as if they own the change. In SIMR, we worked with grantees to develop tailored strategies directly connected to the challenges and root causes the grantee staff identified. In regular calls with grantee staff at all levels, from

facilitators and case managers to project directors, we use interactive, human-centered design techniques to develop creative strategies that blend research and best practices with grantees' knowledge of their service population and unique context.

- 3. Improve: Choose the most rigorous possible design for rapid-cycle learning.** Once we co-created a strategy to address the implementation challenges the grantees wanted to address, we worked with the grantees to develop a rigorous testing plan that will generate actionable evidence for improvement, which we will implement together from October 2021 through September 2022. Testing plans use a mix of qualitative and quantitative data, including data grantees already collect. When possible, we will compare groups of participants exposed to different approaches to service delivery and then use statistical methods to measure how likely it is that one approach is better than the other in improving implementation outcomes. We will then pair these findings with other qualitative and quantitative evidence to determine—along with grantee staff—whether to continue to refine a strategy or test a new one.

Key terms

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

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

Learning cycle: one iteration of a rapid-cycle learning process

Root cause: the core issue underlying a problem that a strategy should be designed to address.▲

Learn: Selecting study grantees, identifying implementation challenges, and conducting needs assessments

In the Learn phase, we identified sites for SIMR and worked closely with them to identify and prioritize implementation challenges. The goal of site selection was to identify a set of grantees that (1) reflected a range of HMRE service delivery models, settings, and populations served; and (2) would benefit from sustained collaborative work to improve their recruitment, retention, or content engagement. In September 2020, OFA awarded grants to the most recent cohort of HMRE grantees. These grantees included 30 adult-serving grantees (called FRAMEWorks grantees) and 25 youth-serving grantees (called Ready4LIFE grantees). When selecting grantees for SIMR, we aimed to include FRAMEWorks grantees operating demonstrations that served couples, as well as those that served individual adults. For Ready4LIFE grantees, we aimed to include grantees that offered HMRE services in schools, as well as grantees that offered community-based services. We followed a staged process to selecting grantees to participate in SIMR:

Goals for the Learn phase of SIMR

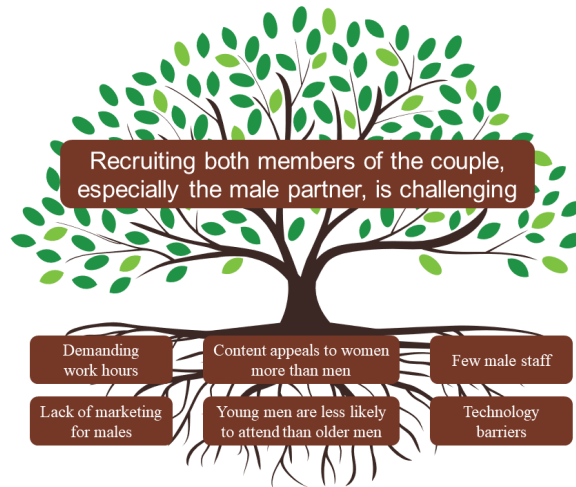
- **To develop a common understanding of the service delivery environment** to ensure the SIMR team and grantee staff develop a common understanding of the local context and people the grantee intends to serve
- **To generate buy-in and motivation for change** by engaging staff at all levels of the organization in defining the problem to solve

1. We reviewed grant applications for the 55 OFA-funded HMRE grantees to understand their service delivery plans and characteristics and identified 20 grantees with characteristics that would help expand the research base. These characteristics included an understudied service population or an opportunity to work on an implementation challenge that would be relevant to other grantees.
2. We conducted telephone interviews with 20 grantees to assess their interest and clarify details from their applications and identified 12 grantees interested in and motivated to participate in SIMR.
3. We held design sessions via web conferencing with 12 grantees that included various interactive activities to understand their implementation challenges and begin to develop strategies.
4. From the 12 grantees, we selected 5 FRAMEWORKS and 5 Ready4LIFE grantees to participate (Tables 1 and 2). The 10 grantees planned to serve a range of populations in a mix of urban and rural locations and reflected a range of implementation challenges relevant to the broader HMRE field. We briefly profile each participating grantee in the appendix.

After inviting the 10 grantees to participate in the SIMR project, we continued design sessions with sites to gain a more detailed understanding of their challenges and to begin to identify potential strategies. To generate buy-in and motivation and capture a range of organizational perspectives, we invited grantees to include a broad range of staff in these sessions, including organizational leaders, project directors, facilitators, and case managers. The sessions used human-centered design activities intended to place people at the center of identifying challenges. We encouraged grantee staff to take the lead in identifying challenges and potential strategies. For example, we asked grantee staff to brainstorm and prioritize challenges and then conduct a problem tree analysis (Figure 3). In this exercise, participants developed a concise statement of a problem and then brainstormed the “roots”—or underlying drivers—of the challenge. Grantees also could brainstorm “leaves”—or what happens when the challenge is not addressed—to gain a deeper understanding of the challenge they wanted to address. In the example shown in Figure 3, the grantee brainstormed roots of a challenge and then grouped these roots according to theme. In doing so, the grantee identified causes for a recruitment problem related to challenges faced by potential participants, such as lack of time and motivation to attend the HMRE services. It also identified problems faced by the grantee, such as a lack of male recruiters and inadequate recruitment strategies geared toward men.

Most of the grantees serving adults (four of five) chose to focus on recruitment challenges. These grantees are either planning to enroll a hard-to-reach population or have less-recent experience with offering HMRE services. In contrast, most of the grantees serving youth (four of five) chose to focus on content engagement challenges. All three of the school-based youth-serving grantees in SIMR have longstanding partnerships with schools, so they did not identify challenges related to recruitment or retention.

Figure 3. Example of a problem tree exercise to identify root causes



Grantees participating in SIMR

Five grantees participating in SIMR are FRAMEWorks grantees, serving adults (Table I.1). All the grantees serving adults are returning grantees who previously received OFA funding, though three had not operated HMRE services in nearly 10 years. The FRAMEWorks grantees include grantees serving adults as individuals and as couples. They operate in a wide range of locations, including very rural regions and dense urban areas. They also focus on a diverse array of populations, from Spanish-speaking couples to incarcerated people and their partners. Four of the FRAMEWorks grantees are addressing recruitment challenges in SIMR, and one is working on retention and content engagement.

Table 1. Summary of FRAMEWorks grantees participating in SIMR

Name (location)	Grantee context	SIMR focus
Anthem Strong Families (Dallas, Texas)	<ul style="list-style-type: none"> Serving English- and Spanish-speaking women and young men without children or romantic partners; focusing on those with low incomes in Dallas, Texas Returning HMRE grantee (2006-2011) that also operates fatherhood services Using <i>TYRO Leadership</i> and <i>Core Communication</i> curricula 	<ul style="list-style-type: none"> Recruitment challenge: How might the grantee recruit more participants? Importance: The grantee has not provided HMRE services since the 2006-2011 grant cycle and is interested in strategies to build new partnerships and recruit from a hard-to-reach population. Strategy: Train staff on more intensive and purposeful approaches to recruiting.

Name (location)	Grantee context	SIMR focus
Family Support Agency of Santa Barbara County (Santa Barbara, California)	<ul style="list-style-type: none"> Serving primarily Spanish-speaking couples and individuals Returning HMRE grantee (2015-2020) Targeting suburban and rural areas around Santa Barbara that have high concentration of Spanish-speaking immigrants Using <i>PREP</i> and <i>Within My Reach</i> curricula 	<ul style="list-style-type: none"> Recruitment challenge: How might the grantee recruit Spanish-speaking men to participate in programming with their partners? Importance: The grantee has historically served more women and is interested in strategies to motivate Spanish-speaking men to enroll. Strategy: Train staff on more intensive and purposeful approaches to recruiting, while examining other structural components (such as frequency and format of workshops) that promote interest in services
Gateway Community Services (Rural Kentucky)	<ul style="list-style-type: none"> Serving rural families Returning HMRE sub-grantee (2006-2011) that also operates fatherhood services Using the <i>Within My Reach</i> curriculum 	<ul style="list-style-type: none"> Recruitment challenge: How might the grantee identify and recruit eligible participants in the rural Appalachian communities it serves? Importance: The grantee is interested in strategies to recruit individuals into HMRE programming, because its primary experience is with serving men through its Responsible Fatherhood demonstration. Strategy: Train staff on more intensive and purposeful approaches to recruiting, while examining other structural components (such as location of workshop) that promote interest in services
Montefiore Medical Center (Bronx, New York)	<ul style="list-style-type: none"> Serving primarily Hispanic and Black couples who have low-incomes and are expectant or parenting Returning HMRE grantee (2006-2011; 2010-2015; 2015-2020) that also operates fatherhood services Using <i>PREP</i> and the <i>Bringing Baby Home</i> curricula 	<ul style="list-style-type: none"> Content engagement challenge: How might the grantee create an engaging virtual version of its long-standing HMRE services? Importance: The grantee is interested in ways to make its virtual services as engaging and high quality as its in-person services. Strategy: Train facilitators to deepen skills for delivering virtual workshops.
The Ridge Project (Ohio)	<ul style="list-style-type: none"> Serving incarcerated and recently released men and women; also serving those with incarcerated partners in separate sessions Returning HMRE grantee (2006-2011) that operated fatherhood services in the prior round of funding Using the <i>TYRO Couples</i> curriculum 	<ul style="list-style-type: none"> Recruitment challenge: How might the grantee successfully recruit participants for HMRE services designed for incarcerated people and their partners? Importance: The grantee is operating HMRE services for the first time and has not tried to enroll incarcerated individuals and their partners before. Strategy: Train staff on more intensive and purposeful approaches to recruiting, while examining other structural components (such as location of workshop) that promote interest in services.

The Ready4LIFE grantees include grantees serving high school-age youth in schools as well as grantees in community settings (Table 2). These grantees serve youth ages 14 to 24. Although some focus primarily on high-school-age youth, others focus on 18- to 24-year-olds, and some serve the full 14-to-24 age range. All of the grantees in SIMR are returning HMRE grantees, but two served adults in the

previous funding cycles and are focusing on a youth population for the first time.¹ As with the FRAMEWorks grantees, grantees for youth serve diverse populations, including young mothers, Spanish-speakers, and youth living in rural areas. One community-based Ready4LIFE grantee has chosen to focus on recruitment topics, and three (all three school-based grantees) have chosen to focus on developing engaging content. One, a community-based grantee, is focusing on content engagement and retention.

Table 2. Summary of Ready4LIFE grantees participating in SIMR

Name (location)	Grantee context	SIMR focus
Auburn University Youth Relationship Education Program (Alabama)	<ul style="list-style-type: none"> Serving youth in high schools across Alabama Using two groups of facilitators: career professionals and undergraduate students (near peers) Returning HMRE grantee (2006-2011; 2010-2015; 2015-2020) that also has programming for adults Using the <i>Relationship Smarts 4.0</i> and <i>Mind Matters</i> curricula 	<ul style="list-style-type: none"> Content engagement challenge: How might the grantee help facilitators build warm, responsive relationships with youth and establish an inclusive and supportive workshop environment? Importance: The grantee is using <i>Mind Matters</i> for the first time and wants to more intentionally integrate content on self-regulation skills in the workshop. Strategy: Use a strategy designed to help facilitators notice, label, and manage their own emotions so they can better support youth in the classroom and coach self-regulation skills practice.
More than Conquerors, Inc. (Atlanta, Georgia)	<ul style="list-style-type: none"> Serving youth in three high schools in the suburbs of Atlanta, Georgia Returning HMRE grantee (2006-2011; 2010-2015; 2015-2020) Using the <i>REAL Essentials Advance</i> curriculum 	<ul style="list-style-type: none"> Content engagement challenge: How might the grantee use case management to enhance content delivery in a school-based HMRE program? Importance: The grantee is interested in strengthening its approach to case management. Strategy: Test an enhanced approach to case management that is informed by the science of goal pursuit.
Texas A&M Agrilife Extension (Brazos Valley, Texas)	<ul style="list-style-type: none"> Serving youth ages 18 to 24 in five suburban and rural Texas counties Returning HMRE grantee (2015-2020) that served adults in the previous round of funding Using the <i>Within My Reach</i> curriculum 	<ul style="list-style-type: none"> Recruitment challenge: How might the grantee recruit youth in the three rural counties it serves? Importance: The grantee would like to make sure it reaches rural youth, who live in areas without access to many services or secular sources of information about healthy relationships. Strategy: Develop and refine a strategy to recruit rural youth using social media.

¹ Although these grantees served participants ages 18 and up in the previous grant cycle, the majority of their participants were older than 24.

Name (location)	Grantee context	SIMR focus
University of Denver (Denver, Colorado)	<ul style="list-style-type: none"> • Serving pregnant and parenting young women ages 14 to 24 who are primarily Hispanic and live in the Denver, Colorado area • Returning HMRE grantee (2015-2020) that served adults in the previous round of funding • Using the <i>Love Notes</i> and <i>Within My Reach</i> curricula 	<ul style="list-style-type: none"> • Content engagement challenge: How might the grantee improve engagement and promote developing peer relationships in virtual workshops? • Importance: The grantee is providing all services virtually and is interested in strategies to build peer relationships when participants cannot interact in person. • Strategy: Use social networking to encourage participants to interact with one another between workshop sessions and practice skills they learn in the <i>Love Notes</i> and <i>Within My Reach</i> workshops.
Youth and Family Services (Rapid City, South Dakota)	<ul style="list-style-type: none"> • Serving high school-age youth in a variety of in- and out-of-school settings • Returning HMRE grantee (2015-2020) • Services intended for youth in rural areas and American Indian reservations • Using the <i>Relationship Smarts 4.0</i> curriculum 	<ul style="list-style-type: none"> • Content engagement challenge: How might the grantee engage youth in large classes? • Importance: The grantee is providing workshops in several classrooms of 40 or more students and is interested in strategies that can engage all students. • Strategy: Deliver the <i>Relationship Smarts 4.0</i> curriculum using two facilitators to provide more opportunities to engage youth, encourage participation, and facilitate large- and small-group activities.

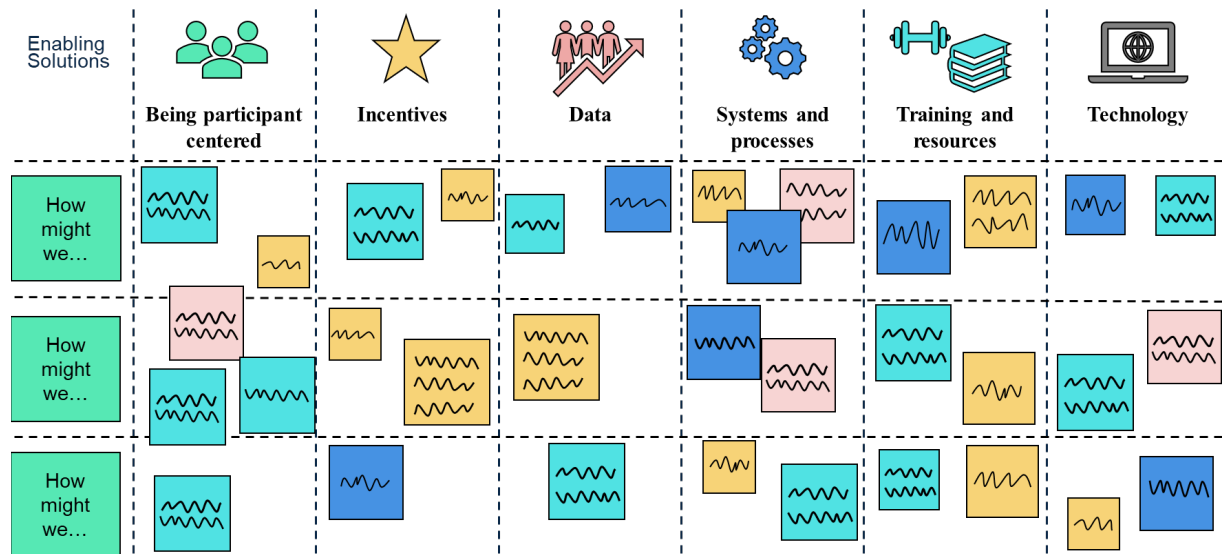
Innovate: Co-creating research-informed strategies and planning rapid-cycle learning

When grantees identified a specific implementation challenge to address as part of rapid-cycle learning, we worked with them to create a tailored strategy to address the challenge and a plan for implementing and testing it. Starting in the design meetings, we facilitated activities to encourage creative thinking. An example of one of these activities is a creative matrix (Figure 4). In this activity, participants rephrase challenges as a statement of opportunity beginning with the phrase “how might we” For example, “Work schedules make attendance difficult,” would be rewritten as, “How might we schedule workshops around a partner’s work schedules?” Those statements become the rows of the matrix. Each column in the matrix represents a different enabling solution such as incentives, use of data, partners, systems and processes, training, technology, or being participant centered. Grantee staff then fill in the matrix with at least one idea for how an enabling solution could address a “how might we” statement in each cell. For example, a staff person might write “Offer on-demand videos with curriculum content” in a cell where the opportunity statement is “how might we schedule workshops around a partner’s work schedules?” and the enabling solution is “technology.”

Goal for the Innovate phase of SIMR

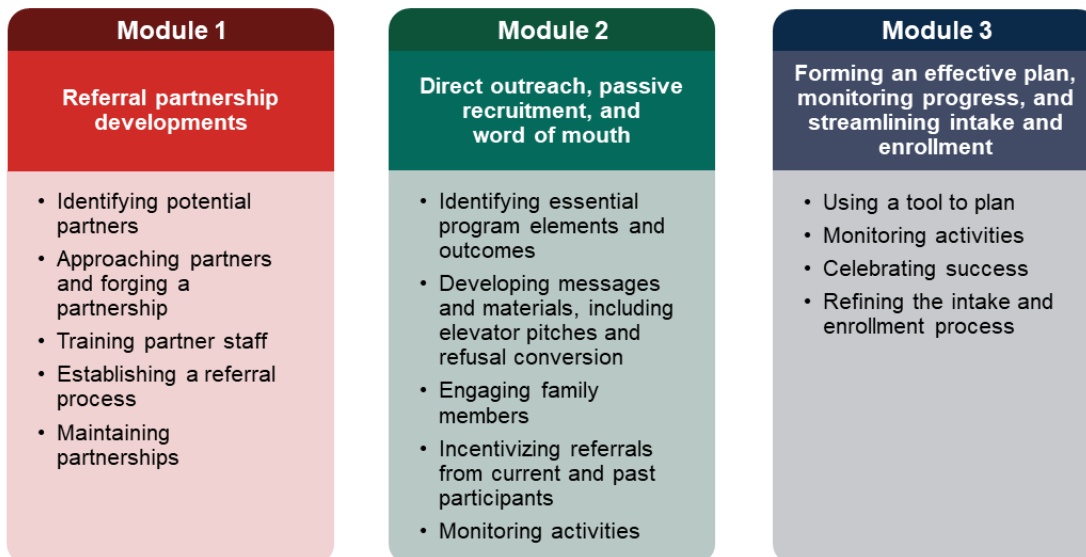
- **Design strategies to address challenges** informed by the evidence and best practices from literature as well as staff’s knowledge of and expertise in the populations they serve and the context in which their organization operates.

Figure 4. A creative matrix to brainstorm strategies to address implementation challenges



Although tailored to the circumstances of individual grantees, the strategies tested in SIMR are informed by evidence and best practices from literature across multiple disciplines including human development and implementation, behavioral, and prevention science. For example, we worked with the five sites focusing on recruitment challenges to develop and customize a training informed by best practices from other successful HMRE grantees (Figure 5) (Friend and Paulsell 2020).

Figure 5. Outline of a modular recruitment training developed for SIMR



As part of the planning process, we led each grantee through a process to develop a plan for implementing its strategy consistently and how to know whether the strategy worked as intended. This included talking with the grantee staff to clarify (1) the goal(s) of the strategy, (2) measurable short-term outcomes, (3) factors in the organization and service delivery environment that could help or hinder implementation,

and (4) other supports the grantee needed to implement the strategy successfully. SIMR provided funding for these supports, such as additional staff, materials, training, and technology. We worked with each grantee to identify indicators and set benchmarks for the success of a strategy based on both: (1) data from the previous grant cycle, when available, and (2) programming goals, such as recruitment targets and grant requirements for workshop attendance and completion. In some cases, we will assess a strategy's success by comparing outcomes for groups exposed to different approaches to service delivery. For example, Montefiore Medical Center's goal is to make its virtual programming as engaging and high quality as its in-person programming. In rapid-cycle testing, we plan to compare participation for couples receiving virtual services to the participation of those who attend services in person.

As a part of the Innovate phase, we also determined how long initial learning cycles would be, based on the type of strategy tested and the service delivery structure and environment. For example, many youth-serving grantees operate within a school calendar. This meant most school-based grantees could run one learning cycle in the fall 2021 semester followed by another in the spring 2022 semester. Each would be about eight weeks long, to provide time to analyze data at the end of the fall and refine the strategy before the start of the spring semester and the next learning cycle. In contrast, for the grantees working on recruitment strategies, it made the most sense to run month-long learning cycles, because grantees typically monitor recruitment and intake weekly and monthly.

Next Steps for the SIMR Project

We conducted the Learn and Innovate phases from September 2020 to August 2021. In fall 2021, grantees participating in SIMR launched learning cycles to test the improvement strategies they have developed. The next step in the SIMR project focuses on the Improve phase.

Improve: Conducting iterative rapid-cycle testing

In the Improve phase, grantees iteratively test and refine their strategy, following the plan developed during the Innovate phase. The grantees can use iterative learning cycles in different ways. In early stages, a grantee could use an iterative learning cycle to refine the details and implementation of a strategy. As staff build capacity and competence with a strategy, later cycles can move to focusing on short-term outcomes. For example, we used an early learning cycle in summer 2021 in the Auburn Youth Relationship Education Program to refine Take Note, Tag It, Tune It (see box below), the strategy they planned to test in a learning cycle during the fall 2021 semester. In the pilot, facilitators used the strategy for four weeks and provided feedback about how they used it, what worked well, and their suggestions for changes to the tools and worksheets included in the strategy.

Goal for the Improve phase of SIMR

- **Test and refine** the strategy according to the plans developed in the Innovate phase, until benchmarks for success are met.

Take Note, Tag It, Tune It (T3): A strategy to help facilitators manage stressful situations

T3 seeks to help facilitators practice the first steps of emotion regulation by increasing mind–body awareness, emotional vocabulary, and healthy behavioral coping. Developing these skills can enable them to better manage stressful situations, such as teaching virtually, returning to in-person learning, and/or teaching a workshop for the first time. The strategy includes prompts for the facilitator to “take note” (notice and write down sensations in the body); “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 provoke the feelings); and then “tune it” (if the emotion is intense, practice a strategy from a list of self-populated approaches to regulate the emotion). In the third step, facilitators can choose a self-regulation strategy they coach youth to use as a part of the *Mind Matters* curriculum, which the Auburn Youth Relationship Education Program is using for the first time. By using a strategy that facilitators also coach youth to use, T3 will ideally help facilitators be more intentional about their own self-regulation and, ultimately, be better at facilitating self-regulation skills practice with youth.

Learning cycles use multiple sources of data to assess implementation and the success of the tested strategy. These include:

- **Semistructured interviews with grantee staff.** These interviews, held toward the end of a learning cycle, aim to gather qualitative information about how staff implement a strategy, their perceptions of how it is working, and their suggestions for improvement.
- **Participant interviews and focus groups.** We are conducting focus groups and one-on-one interviews with participants at the end of learning cycles to understand their impressions of the

services they received and assess how the strategies might have influenced their behaviors and opinions.

- **Staff surveys.** Staff surveys seek to gather feedback about staff members' use of a strategy, self-efficacy, and knowledge of concepts covered during trainings. In some cases, staff might complete surveys multiple times during a learning cycle to see how their use of a strategy and their sense of self-efficacy changes over time as they become more comfortable with a strategy and, ideally, implementation becomes stronger.
- **nFORM and other data.** All grantees enter service delivery data (such as workshop attendance data or case management contacts) into nFORM, which we can use to monitor outcomes related to enrollment, attendance, and service receipt. In addition, some grantees have systems to track information not included in nFORM, such as planning for and measuring the success of their recruitment activities.

What is nFORM?

nFORM (Information, Family Outcomes, Reporting, and Management) is a management information system, sponsored by ACF, that grantees use to record participants' characteristics and participation in services, monitor service use, and make data-informed decisions.

Throughout the learning cycle, we will meet with grantee staff to discuss progress, identify challenges and barriers, monitor data (such as weekly recruitment or retention numbers), and fine tune the strategy as necessary.

The end of a learning cycle provides an opportunity to take stock of a strategy and refine it before testing it again in the next learning cycle. In a debrief meeting, SIMR team members will present data to the grantee staff, such as summary statistics from nFORM, a staff survey, or themes from a focus group. Then, SIMR team members will facilitate a discussion to engage grantee staff in interpreting the data and determining next steps. Based on the debrief, grantees could (1) adjust the strategy based on their experience using it and test to refine the version of the strategy in the next cycle; (2) identify another emerging challenge the next learning cycle might need to address; or (3) expand the strategy for use in a new setting or with new staff. At the end of the learning cycle, grantees can draw 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"). We will continue learning cycles with each of the 10 SIMR sites for a 12-month period, through September 2022. A final report from the SIMR study will compile findings across the learning cycles that sites will conduct over the next year.

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Appendix A
Grantee Profiles

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Anthem Strong Families: Family Champions Project



Service location: Dallas, Texas, and surrounding counties



Who it serves: Adults with lower incomes with a focus on mothers and young men who do not have children

Description of Services

The grantee offers in-person and virtual services in both English and Spanish and includes the following:



Healthy relationship and parenting services

- 20-hour primary workshop consists of 2-hour classes for 10 weeks (blended curriculum of *TYRO Leadership* and *Core Communication*)
- Optional 1-hour workshop on domestic violence and intimate partner violence offered before each primary workshop session
- Optional group-based mini-clinic offers 1 to 3 hours of content on a variety of healthy relationship topics



Job and career services

- Individualized support that can include employment assessment, job development, job placement, and job retention
- Optional workshop on job searching and job skills (uses *TYRO Job Ethics* curriculum)



Case management services

- Development of an individualized case management plan
- Referrals to community resources

Implementation challenge:

How might the grantee recruit more people into its HMRE program?

Initial solution to test: The SIMR team will train grantee staff on techniques and strategies to enhance recruitment and enrollment of eligible participants.¹ The training will cover five areas: (1) developing referral partnerships, (2) expanding and enhancing direct outreach to potential participants, (3) developing effective passive recruitment strategies or advertising, (4) using word-of-mouth referrals from former participants and other friends and family, and (5) forming and monitoring an effective recruitment plan. During a set of learning cycles, the SIMR team will collect data from staff and participants to determine what barriers or challenges exist that might diminish interest in services or inhibit the ability to enroll. Using these data, we will work with grantee staff to develop and test structural changes to the services, such as an alternative workshop schedule or incentives to promote enrollment.

¹All adult-serving grantees focusing on recruitment will use the same format for their solutions and rapid-cycle learning plan. However, the application of the training content will be specific to the grantee's context and the people it aims to serve. In Anthem, for example, partner development could focus on deepening partnerships with its existing partner for fatherhood services and establishing new partners to recruit mothers and young men into the new HMRE services.

Initial rapid-cycle learning plan: Anthem Strong Families

<p>Learning Cycle 1 (September 2021)</p>	<p>Goal of cycle Conduct partnership development training and monitor overall success of and skill gains from training.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Pre- and post-training survey with grantee staff • Qualitative feedback from staff
<p>Learning Cycle 2 (September and November 2021)</p>	<p>Goal of cycle Assess the success of strategies to increase the number and quality of referral partnerships. Examine whether the number of enrollments increased over time.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment staff on the use of strategies for developing and maintaining referral partnerships • Qualitative data from partner staff on partnership quality and referral process • Qualitative data from participants on referral process • nFORM data on enrollment
<p>Learning Cycle 3 (November 2021)</p>	<p>Goal of cycle Conduct training on direct outreach and passive and word-of-mouth recruitment and monitor overall success of and skill gains from training.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Pre- and post-training survey with grantee staff • Qualitative feedback from staff
<p>Learning Cycle 4 (November 2021 to March 2022)</p>	<p>Goal of cycle Assess the success of strategies to improve direct outreach, advertising, and using word-of-mouth referrals to participants. Examine whether the number of enrollments increased over time.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment staff on the use of strategies for direct outreach • Qualitative data from participants on efficacy of direct outreach efforts • Qualitative data from recruitment staff on the development of and perceived efficacy of the advertisements • Qualitative data from recruitment staff on identifying and training and using participants or others to conduct word-of-mouth referral activities • Qualitative data from participants on efficacy of ads and word-of-mouth referrals • Analytics on advertisements, when applicable (for example, number of impressions or views from social media ads) • nFORM data on enrollment
<p>Series of learning cycles (April to September 2022)</p>	<p>Goal of cycle Use cycles to examine success of refinements to intake process and other solutions to address barriers to participant interest and enrollment in the services.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment and intake staff • Qualitative data from participants or potential participants • nFORM data on enrollment • Survey and other data on intake (for example, length of intake)



Auburn University: Alabama Youth Relationship Education Program



Service location: 11 counties in Alabama



Who it serves: Youth in high school (grades 9–12)

Description of Services

The grantee offers in-person services during the school day in high schools and features the following:



Healthy relationship and parenting services

- Primary 12-hour workshop consists of 8 weekly 90-minute sessions that include 8 hours of *Relationship Smarts PLUS 4.0*, 3 hours of *Mind Matters* (self-regulation), and 1 hour of *Money Habitudes* (financial management)



Support services

- Links to support services, including a community resource list and referrals to external programs and services offered by schools, family resources centers, and partners (parenting programs and job skills training)



Facilitation structure

- Facilitators are trained marriage and relationship community educators and “near peer” educators who are trained undergraduate students

Implementation challenge:

How can facilitators create a welcoming and supportive classroom environment and form more supportive relationships with youth?

Initial solution to test: Auburn will focus on self-regulation strategies for facilitators. Facilitators’ ability to regulate their own emotions, thoughts, and behaviors is crucial for modeling and coaching self-regulation in youth, and foundational to warm relationships and supportive environments. The specific strategy is T3 (Take Note, Tag It, Tune It), a strategy developed by Mathematica and Public Strategies to help adults identify, acknowledge, and manage their feelings. The overall goal of the strategy is to enable adults to manage stressful situations better by increasing emotional awareness and vocabulary and improving distress tolerance. The strategy also supports adult facilitators in intentionally practicing the self-regulation skills they teach youth in the *Mind Matters* curriculum.

Initial rapid-cycle learning plan: Auburn University

Learning Cycle 1 (summer 2021)	Goal of cycle Train eight facilitators to use the T3 strategy in their personal lives, with an intent to refine the T3 training and tool before Learning Cycle 2.	Data collection methods <ul style="list-style-type: none">• Training feedback survey• Interviews with facilitators using human-centered design activities• T3 worksheets in which facilitators document their use of the strategy during the testing period
Learning Cycle 2 (fall 2021)	Goal of cycle Train 12 facilitators on T3. Trained facilitators then will use the strategy while delivering workshop content over the course of the semester.	Data collection methods <ul style="list-style-type: none">• Qualitative interviews with facilitators• Facilitator survey• T3 worksheets• Youth assessment of facilitators (AYRE student survey)
Learning Cycle 3 (spring 2022)	Goal of cycle Refine T3 with a new set of facilitators.	Data collection methods <ul style="list-style-type: none">• Qualitative interviews with facilitators• Facilitator survey• T3 worksheets• Youth assessment of facilitators' co-regulation skills (AYRE student survey)





FAMILY SERVICE AGENCY
Since 1899

Family Service Agency of Santa Barbara County: Healthy Marriage and Relationship and Stability Program



Service location: Santa Barbara County, California



Who it serves: Adult couples and individuals, with a focus on Spanish speakers

Description of Services

The grantee offers in-person and virtual programming in both English and Spanish and features the following:



Healthy relationship and parenting services

- Primary workshop consists of 15 hours of curriculum content (*Within My Reach* for individuals or *PREP 8.0* for couples)
- Optional parenting workshops for those with children that include 11 to 14 weeks of content



Economic stability services

- Individualized employment assessment, job development, training and education, job placement, and job retention
- Partner with several agencies to provide English as a second language services and literacy tutoring
- Optional workshops on job search skills



Case management services

- Individualized development plan
- Case management meetings at least once per month
- Referrals to community resources

Implementation challenge:

How might the grantee recruit more men who primarily speak Spanish to participate with their partners in programming?

Initial solution to test: The SIMR team will train grantee staff on techniques and strategies to enhance recruitment and enrollment of eligible participants. The training will cover five areas: (1) developing referral partnerships, (2) expanding and enhancing direct outreach to potential participants, (3) developing effective passive recruitment strategies or advertising, (4) using word-of-mouth referrals from former participants and other friends and family, and (5) forming and monitoring an effective recruitment plan. During a set of learning cycles, the SIMR team will collect data from staff and participants to determine what barriers or challenges exist might diminish interest in the services or inhibit the ability to enroll. Using these data, we will work with the grantee staff to develop and test structural changes to services (for example, workshop schedule or enrollment incentives).

¹All adult-serving grantees focusing on recruitment will use the same format for their solutions and rapid-cycle learning plan. However, the application of the training content will be specific to the grantee's context and the people it aims to serve. In Family Service Agency of Santa Barbara, for example, partner development might focus on establishing new partners to recruit men who primarily speak Spanish and are in a relationship.

Initial rapid-cycle learning plan: Family Service Agency of Santa Barbara

<p>Learning Cycle 1 (September 2021)</p>	<p>Goal of cycle Conduct partnership development training and monitor overall success of and skill gains from training.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Pre- and post-training survey with grantee staff • Qualitative feedback from staff
<p>Learning Cycle 2 (September to November 2021)</p>	<p>Goal of cycle Assess the success of strategies to increase the number and quality of referral partnerships. Examine whether the number of enrollments increased over time.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment staff on the use of strategies for developing and maintaining referral partnerships • Qualitative data from partner staff on partnership quality and referral process • Qualitative data from participants on referral process • nFORM data on enrollment
<p>Learning Cycle 3 (November 2021)</p>	<p>Goal of cycle Conduct direct outreach, passive recruitment, and word-of-mouth training and monitor overall success of and skill gains from training.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Pre- and post-training survey with grantee staff • Qualitative feedback from staff
<p>Learning Cycle 4 (November 2021 to March 2022)</p>	<p>Goal of cycle Assess the success of strategies to improve direct outreach, advertising, and using word-of-mouth referrals to participants. Examine whether the number of enrollments increased over time.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment staff on the use of strategies for direct outreach • Qualitative data from participants on efficacy of direct outreach efforts • Qualitative data from recruitment staff on the development of and perceived efficacy of the advertisements • Qualitative data from recruitment staff on identifying and training and using participants or others to conduct word-of-mouth referral activities • Qualitative data from participants on efficacy of ads and word-of-mouth referrals • Analytics on advertisements, when applicable (for example, number of impressions or views from social media ads) • nFORM data on enrollment
<p>Series of learning cycles (April to September 2022)</p>	<p>Goal of cycle Use cycles to examine success of refinements to intake process and other solutions to address barriers to participant interest and enrollment in services.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment and intake staff • Qualitative data from participants or potential participants • nFORM data on enrollment • Survey and other data on intake (for example, length of intake)



Gateway Community Services Organization, Inc.: FRAMEWorks Program



Service location: Serving 9 rural counties in eastern Kentucky



Who it serves: Adults with lower incomes, with a focus on parents

Description of Services

The grantee features in-person and virtual services, and includes the following:



Healthy relationship services

- Primary 18-hour workshop (*Within My Reach* and financial education) offers nine 2-hour sessions



Job and career services

- Individualized employment assessment, job development, training and education, job placement, and job retention
- Partnered with local organization to provide financial education
- Optional 12-hour job readiness workshop (*Tackling the Tough Skills*)



Case management services

- Individualized development plan
- Minimum of 8 case management sessions that occur before or after program activities
- Referrals to community resources

Implementation challenge:

How can the grantee recruit more parents in the rural communities of eastern Kentucky it serves?

Initial solution to test: The SIMR team will train grantee staff on techniques and strategies to enhance recruitment and enrollment of eligible participants. The training will cover five areas: (1) developing referral partnerships, (2) expanding and enhancing direct outreach to potential participants, (3) developing effective passive recruitment strategies or advertising, (4) using word-of-mouth referrals from former participants and other friends and family, and (5) forming and monitoring an effective recruitment plan. During a set of learning cycles, the SIMR team will collect data from staff and participants to determine what barriers or challenges exist that might diminish interest in services or inhibit the ability to enroll. Using these data, we will work with the grantee staff to develop and test structural changes to services (for example, workshop schedule or enrollment incentives).

¹All adult-serving grantees focusing on recruitment will use the same format for their solutions and rapid-cycle learning plan. However, the application of the training content will be specific to the grantee's context and the people it aims to serve. In Gateway, for example, partner development might focus on using an existing relationship between Gateway and Head Start to recruit more parents.

Initial rapid-cycle learning plan: Gateway Community Services, Inc.

<p>Learning Cycle 1 (September 2021)</p>	<p>Goal of cycle Conduct partnership development training and monitor overall success of and skill gains from training.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Pre- and post-training survey with grantee staff • Qualitative feedback from staff
<p>Learning Cycle 2 (September to November 2021)</p>	<p>Goal of cycle Assess the success of strategies to increase the number and quality of referral partnerships. Examine whether the number of enrollments increased over time.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment staff on the use of strategies for developing and maintaining referral partnerships • Qualitative data from partner staff on partnership quality and referral process • Qualitative data from participants on referral process • nFORM data on enrollment
<p>Learning Cycle 3 (November 2021)</p>	<p>Goal of cycle Conduct training on direct outreach, passive recruitment, and word-of-mouth training and monitor overall success of and skill gains from training.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Pre- and post-training survey with grantee staff • Qualitative feedback from staff
<p>Learning Cycle 4 (November 2021 to March 2022)</p>	<p>Goal of cycle Assess the success of strategies to improve direct outreach, advertising, and using word-of-mouth referrals to participants. Examine whether the number of enrollments increased over time.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment staff on the use of strategies for direct outreach • Qualitative data from participants on efficacy of direct outreach efforts • Qualitative data from recruitment staff on the development of and perceived efficacy of the advertisements • Qualitative data from recruitment staff on identifying and training and using participants or others to conduct word-of-mouth referral activities • Qualitative data from participants on efficacy of ads and word-of-mouth referrals • Analytics on advertisements, when applicable (for example, number of impressions or views from social media ads) • nFORM data on enrollment
<p>Series of learning cycles (April to September 2022)</p>	<p>Goal of cycle Use cycles to examine success of refinements to intake process and other solutions to address barriers to participant interest and enrollment in services.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment and intake staff • Qualitative data from participants or potential participants • nFORM data on enrollment • Survey and other data on intake (for example, length of intake)





**Supporting
Healthy
Relationships**
BUILDING FUTURES AROUND FAMILIES

Montefiore Medical Center: Supporting Healthy Relationships Program



Service location: The Bronx, New York



Who it serves: Parenting couples with low incomes living

Description of Services

The grantee offers in-person and virtual services in both English and Spanish, and features the following:



Healthy relationship services

- Primary workshop consists of 10-weekly two-hour sessions that teach content from *PREP 8.0* and *Bringing Baby Home*
- Individual booster sessions to reinforce skills learned in workshops
- Supplemental workshops, support groups, date nights, and family events



Job and career services

- Individualized employment assessment, job development, job placement, and job retention
- Employment workshops and job clubs
- Financial management and budgeting



Case management services

- Individualized service plan
- Referrals to community resources
- Assistance obtaining benefits and services
- Coordination and collaboration with local child support office as needed and appropriate

Implementation challenge:

How can the grantee deliver engaging virtual workshops to promote high rates of program retention and content engagement?

Initial solution to test: The SIMR team will train facilitators on strategies to enhance delivery of virtual workshops. The training covers four areas: (1) using and troubleshooting technology, (2) building relationships online, (3) managing the classroom and time in a virtual environment, and (4) engaging online facilitation techniques and skills. In addition, we will conduct a participants' needs assessment to determine what structural barriers (for example, Internet or technology access) exist that impede participation in virtual services.

Initial rapid-cycle learning plan: Montefiore Medical Center

<p>Learning Cycle 1 (August 2021)</p>	<p>Goal of cycle Conduct training and measure overall success of and skill gains from training.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Pre- and post-training survey with facilitators • Qualitative feedback from staff
<p>Learning Cycle 2 (September to December 2021)</p>	<p>Goal of cycle Determine how the facilitators apply the knowledge and skills from training and identify additional areas of support or refinement.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Observations of recorded workshop sessions to assess facilitators' training content use and participants' engagement • Qualitative data from facilitators on use of training content and specific strategies • nFORM data on retention
<p>Series of learning cycles (January 2021 to September 2022)</p>	<p>Goal of cycle Use cycles to test success of refinements to strategies generated from the training content and other solutions to address participants' barriers to retention and content engagement in virtual sessions.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Observations of recorded sessions to assess facilitators' training content use and participants' engagement • Qualitative data from facilitators on use of training content and specific strategies • Focus groups with participants about facilitators and barriers to attendance and content engagement • Participant surveys on content engagement • nFORM data on retention





More Than Conquerors, Inc.: Marriage Appreciation Training Uplifting Relationship Education (MATURE Plus III)



Service location: Gwinnett County, Georgia
(Atlanta metropolitan area)



Who it serves: Youth in high school (grades 9 and 10)

Description of Services

The grantee offers in-person services during the school day and features the following:



Healthy relationship services

- Primary workshop consists of 18 45-minute sessions, delivering the *REAL Essentials Advance* curriculum and covering topics related to healthy relationship skills (communication and conflict resolution); healthy decision-making skills (managing stress, physical and mental well-being); and future planning (setting goals and success sequencing)
- Budgeting and financial literacy instruction provided by a partner



Case management services

- Up to four one-on-one meetings with a case manager focused on setting and achieving goals for a subset of youth
- Linkages to community-centered supportive service agencies (for example, smoking cessation and food assistance)

Implementation challenge:

How can the grantee enhance its case management services to ensure the grantee is supporting students and reinforcing the curriculum content outside of the classroom?

Initial solution to test: More Than Conquerors, Inc.'s (MTCI's) solution has two components. First, case managers will deliver the *REAL Essentials Advance* lesson on goal setting during the second week of the core workshop. Second, after students receive the goal-setting lesson, they will receive up to four one-on-one meetings with a case manager. During the initial meeting, students will work with a case manager to set a goal related to curriculum content areas, break the goal into concrete and attainable steps, and identify potential "potholes" and "detours"—complications they might encounter in achieving their goal and steps they could take to avoid them. As part of these goal-setting conversations, case managers will provide referrals to community resources, as appropriate. After the initial meeting, students will receive up to three follow-up meetings, at 30, 60, and 90 days, to check in on progress toward their goals and to follow up on any referrals.

Initial rapid-cycle learning plan: More than Conquerors, Inc.

Learning Cycle 1 (fall 2021)

Goal of cycle

Pilot enhanced case management approach, including initial and follow-up meetings to understand fit and inform refinements.

Data collection methods

- Data on frequency, duration, and content of case management sessions
- Interviews with MTCI case managers and facilitators focused on implementation
- Focus groups with youth to understand case management experiences
- nFORM data on workshop attendance to compare attendance of youth who are eligible to receive case management to those who are not eligible

Learning Cycle 2 (spring 2022)

Goal of cycle

Continue to refine case management approach based on findings from Learning Cycle 1.

Data collection methods

- Data on frequency, duration, and content of case management sessions
- Interviews with MTCI case managers and facilitators focused on implementation
- Focus groups with youth to understand case management experiences
- nFORM data on workshop attendance





The RIDGE Project: TYRO Couples Program



Service location: Seven Ohio counties



Who it serves: Men and women 18 years and older who are incarcerated or were incarcerated within the past 9 months, and their romantic partners

Description of Services

The grantee features in-person and virtual services. For participants who are incarcerated, their partner who is not incarcerated may participate in person or through synchronous or asynchronous virtual services, depending on the prison and the couples' circumstances. The grantee's services includes the following:



Healthy relationship services

- Primary workshops offer either five 2-hour sessions (*TYRO Couples*) or six 2-hour sessions (*Couples Communication*), meeting twice weekly
- 30-minute asynchronous videos on healthy relationship topics (*TYRO TV*)
- Marriage and family events
- TYRO Alumni communities



Job and career services

- Individualized employment assessment, job development, job placement, and job retention
- Financial management and budgeting
- Optional two-day job ethics training workshop



Case management services

- Development of individualized service plan
- Continued support for participants and their partners after they are released from prison
- Referrals to community resources
- Assistance obtaining public benefits and services

Implementation challenge:

How can the grantee encourage more incarcerated participants and their nonincarcerated partners to enroll in the program?

Initial solution to test: The SIMR team will train grantee staff on techniques and strategies to enhance recruitment and enrollment of eligible participants. The training will cover five areas: (1) developing referral partnerships, (2) expanding and enhancing direct outreach to potential participants, (3) developing effective passive recruitment strategies or advertising, (4) using word-of-mouth referrals from former participants and other friends and family, and (5) forming and monitoring an effective recruitment plan. During a set of learning cycles, the SIMR team will collect data from staff and participants to determine what barriers or challenges exist that might diminish interest in services or inhibit the ability to enroll. Using these data, we will work with the grantee staff to develop and test structural changes to services (for example, workshop schedule or enrollment incentives).

¹All adult-serving grantees focusing on recruitment will use the same format for their solutions and rapid-cycle learning plan. However, the application of the training content will be specific to the grantee's context and the people it aims to serve. In RIDGE, for example, partner development might focus on establishing relationships with additional community agencies to engage the nonincarcerated partners of incarcerated program participants.

Initial rapid-cycle learning plan: The RIDGE Project

<p>Learning Cycle 1 (September 2021)</p>	<p>Goal of cycle Conduct partnership development training and monitor overall success of and skill gains from training.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Pre- and post-training survey with grantee staff • Qualitative feedback from staff
<p>Learning Cycle 2 (September to November 2021)</p>	<p>Goal of cycle Assess the success of strategies to increase the number and quality of referral partnerships. Examine whether the number of enrollments increased over time.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment staff on the use of strategies for developing and maintaining referral partnerships • Qualitative data from partner staff on partnership quality and referral process • Qualitative data from participants on referral process • nFORM data on enrollment
<p>Learning Cycle 3 (November 2021)</p>	<p>Goal of cycle Conduct direct outreach, passive recruitment, and word-of-mouth training and monitor overall success of and skill gains from training.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Pre- and post-training survey with grantee staff • Qualitative feedback from staff
<p>Learning Cycle 4 (November 2021 to March 2022)</p>	<p>Goal of cycle Assess the success of strategies to improve direct outreach, advertising, and using word-of-mouth referrals to participants. Examine whether the number of enrollments increased over time.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment staff on the use of strategies for direct outreach • Qualitative data from participants on efficacy of direct outreach efforts • Qualitative data from recruitment staff on the development of and perceived efficacy of the advertisements • Qualitative data from recruitment staff on identifying and training and using participants or others to conduct word-of-mouth referral activities • Qualitative data from participants on efficacy of ads and word-of-mouth referrals • Analytics on advertisements, when applicable (for example, number of impressions or views from social media ads) • nFORM data on enrollment
<p>Series of learning cycles (April to September 2022)</p>	<p>Goal of cycle Use cycles to examine the success of refinements to the intake process and other solutions to address barriers to participants' interest and enrollment in services.</p>	<p>Data collection methods</p> <ul style="list-style-type: none"> • Qualitative data from recruitment and intake staff • Qualitative data from participants or potential participants • nFORM data on enrollment • Survey and other data on intake (for example, length of intake)



Texas A&M Agrilife Extension: Strengthening Families of the Brazos Valley's SUCCESS... Powered by YOU Program



Service location: 5 counties in the Brazos Valley (Brazos, Burleson, Grimes, Madison, and Robertson counties) in Texas



Who it serves: Youth 18 to 24 years old

Description of Services

The grantee offers services in both English and Spanish and features the following:



Healthy relationship and parenting services

- Primary *Within My Reach* workshop offered in two formats: (1) 3 weekly virtual one-hour sessions followed by an 8-hour in-person retreat and a 1-hour final virtual session and (2) 6 weekly 2-hour virtual sessions
- Optional parenting workshop with 6 weekly 1-hour sessions that uses the *Common Sense Parenting* curriculum



Financial education services

- Optional workshop with four weekly 1-hour sessions using the *Money Smart* curriculum



Case management services

- Development of individualized service plan
- Referrals to community resources
- Assistance obtaining public benefits and services
- Encourage attendance at workshops, reinforcement of skills learned during group sessions, and completion of homework

Implementation challenge:

How can the grantee recruit and engage rural youth specifically in Robertson, Grimes, and Madison counties (the three most rural counties in its service area)?

Initial solution to test: The grantee will use Instagram to enhance its visibility among young adults and encourage enrollment. We are testing different types of messaging and content to reach rural youth.

Initial rapid-cycle learning plan: Texas A&M Agrilife Extension

Learning Cycle 1 (fall 2021)

Goal of cycle

Identify the types of messages that most resonate with participants to enroll in services.

Monitor success of a series of Instagram campaigns to (1) raise visibility and increase number of followers and (2) increase enrollment in rural counties.

Data collection methods

- Focus groups with current participants
- Instagram and Google analytics
- Recruitment data
- nFORM data on enrollment
- Qualitative data from participants on perceptions of Instagram content

Series of learning cycles (winter to summer 2022)

Goal of cycle

Use cycles to test efficacy of refinements to the Instagram recruiting approach, broader recruitment strategies, and other uses of Instagram, such as engaging current participants.

Data collection methods

- Recruitment data
- nFORM data on enrollment





University of Denver: MotherWise



Service location: Denver, Colorado



Who it serves: Youth ages 14 to 24 who are pregnant or parenting, with a focus on Hispanic and Latina populations

Description of Services

The grantee offers in-person and virtual services in both English and Spanish, and features the following:



Healthy relationship services

- Primary workshop for youth (primarily ages 14 to 17) consists of 6 weekly 4-hour sessions of *Love Notes*
- Curriculum for older participants (primarily 18 and older) is *Within My Reach*



Case management services

- At least 4 meetings throughout the duration of services
- Needs assessment at intake
- Integration of core curriculum into case management
- Links to community services



Parenting supplement

- Basic information on infant care and parenting that combines lecture and discussion for 20 minutes during each workshop session

Implementation challenge:

How can the grantee enhance engagement and sense of community in its virtual programming?

Initial solution to test: MotherWise's primary strategy will be to integrate the Nest, a closed social network, into the core group workshop. MotherWise will use the network for multiple purposes, including sending attendance reminders, sharing resources with participants, and completing activities outside the primary workshop that reinforce curriculum content.

Initial rapid-cycle learning plan: University of Denver

Learning Cycle 1 (summer 2021)	Goal of cycle Generate baseline data on levels of workshop engagement while trying an icebreaker activity to encourage more camera use in workshops.	Data collection methods <ul style="list-style-type: none">• Observation ratings on participants' engagement, participation, and reactions• Facilitators' feedback in human-centered design sessions
Learning Cycle 2 (fall 2021)	Goal of cycle Pilot use of Nest as a network for reminders, resource sharing, and community building. The aim is to understand participants' engagement with Nest and whether the use of Nest influences workshop engagement and sense of community within the session.	Data collection methods <ul style="list-style-type: none">• Nest internal tracking (for example, number of registrations, grantee staff and participant posts, interactions, and so on)• Facilitators' assessment of participants' engagement• Participant interviews or focus groups
Learning Cycle 3 (early 2022)	Goal of cycle Continue to refine Nest strategies, focusing on use of the Nest to provide content reinforcement and make-up sessions.	Data collection methods <ul style="list-style-type: none">• Nest internal tracking (for example, number of registrations, grantee staff and participant posts, interactions, and so on)• Facilitators' assessment of participants' engagement• Participant interviews or focus groups• nFORM data on workshop participation and completion



Youth & Family Services: Stronger Youth Program



Service location: Rapid City, South Dakota, and surrounding counties



Who it serves: Youth in high school (grades 9–12) and youth in alternative residential and educational settings (such as residential behavioral healthcare and inpatient drug rehabilitation programs), including American Indian youth

Description of Services

The grantee provides in-person services in high schools and community and residential settings (such as inpatient behavioral health and drug rehabilitation) and features the following:



Healthy relationship services

- Primary 12-hour workshop for youth (ages 14 to 18) uses *Relationships Smarts PLUS 4.0*
- Formats vary by location, including 12 one-hour sessions or 6 two-hour sessions over 3 weeks
- All workshops are co-facilitated by two trained Youth & Family Services staff

Implementation challenge:

How can the grantee strengthen its approach to co-facilitating workshops?

Initial solution to test: We are working with Youth & Family Services to develop a training on best practices for co-facilitating group workshops that includes three key elements: (1) pre-planning, (2) strategies to promote in-session communication between co-facilitators, and (3) debriefing between co-facilitators. Youth & Family Services facilitators will participate in the training and then pilot co-facilitation strategies in two settings: small, rural high schools and a larger, more urban high school with large classrooms. Co-facilitators will be male/female and seasoned/novice pairs.

Initial rapid-cycle learning plan: Youth and Family Services

Learning Cycle 1 (early fall 2021)

Goal of cycle

Examine the implementation of the enhanced co-facilitation approach and ways in which youth engage with co-facilitators to inform refinements. In the first cycle, the approach will be implemented in a classroom environment in two small rural high schools with class sizes of 15 to 20 youth.

Data collection methods

- Grantee-administered youth exit tickets after each session to gauge youth engagement
- Survey facilitators to understand fidelity to the approach
- Group or individual interviews with facilitators to gauge perceptions and suggestions to refine
- Observations to understand fidelity to the co-facilitation approach; assess youth engagement with facilitators
- nFORM exit survey data to examine changes in attitudes and behavioral intentions related to relationships

Learning Cycle 2 (late fall 2021)

Goal of cycle

Implement the refined co-facilitation approach in a larger, more urban high school with class sizes of up to 40 youth. In the second cycle, the grantee will explore the need for adjustments to the co-facilitation approach for larger classes.

Data collection methods

- Same data collection activities as above

Learning Cycle 3 (spring 2022)

Goal of cycle

Continue to refine co-facilitation approach in different settings, such as classrooms on the Pine Ridge Indian Reservation.

Data collection methods

- Same data collection activities as above



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