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Strengthening the Implementation of Marriage and Relationship Programs

SIMR Practice Brief

Using Data to Guide Program Improvement in Healthy Marriage and Relationship Education Services

All healthy marriage and relationship education (HMRE) grant recipients are required to conduct continuous quality improvement (CQI) efforts as part of their grant. Rapid cycle learning—an approach to develop, test, and refine strategies to address implementation challenges—is a tool that grant recipients can use as a part of their CQI plans. Using rapid cycle learning, 10 HMRE grant recipients participating in the Strengthening the Implementation of Marriage and Relationship Programs (SIMR) project developed, tested, and refined strategies to address key implementation challenges.

This brief shares examples of how these HMRE services used data to learn about their efforts. Grant recipients can use information in this brief to enhance their CQI plans. Drawing on tools and lessons learned from SIMR, this brief provides four tips for using data in program improvement efforts:

1. Develop learning questions to clarify what you hope to learn.
2. Gather data to assess progress towards your goals.
3. Gather feedback from staff, participants, and partners to inform refinements.
4. Interpret findings with your team.

What is rapid cycle learning?

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

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

Mathematica. Public Strategies

OPRE OFFICE OF FAMILY ASSISTANCE An Office of the Administration for Children & Families

HMRF HEALTHY MARRIAGE & RESPONSIBLE FATHERHOOD

Why track data?

When testing and assessing a strategy to improve programming, grant recipients need to clearly understand what happened when they implemented the strategy and why it happened. To gain this clear understanding, they can **identify and track key indicators**—measures that show progress toward a service's goals.

Grant recipients might be able to draw on existing administrative data to track their progress or can consider low-burden ways to track useful indicators. To develop a greater understanding for how and why improvement strategies work, it is also valuable to collect **qualitative feedback from staff, participants, and partners**. Examples of useful indicators tracked by HMRE grant recipients participating in SIMR, as well as feedback they collected to assess the success of strategies to strengthen recruitment, retention, and engagement in their HMRE services, are embedded in the tips below.

Recommendation

When assessing a strategy to improve programming, grant recipients can track indicators (such as quantitative counts) and feedback from various sources (such as qualitative data).

Indicators. These are data collected to monitor performance. In rapid cycle learning, indicators are important for assessing the potential success of a strategy to improve programming.

Feedback. These are data collected to understand the perspectives of key people involved in an improvement effort. In rapid cycle learning, feedback helps service providers understand how and why a strategy worked the way it did. Grant recipients can use this information to refine their strategy.

Tip 1. Develop learning questions to clarify what you hope to learn

Grant recipients should define what they hope to learn from testing their strategy before they begin testing. Developing learning questions helped HMRE grant recipients in SIMR shape their plans for collecting data. Initial questions often focus on implementation, process, and early outcomes to explore how a strategy is working before determining whether it influences longer-term outcomes.

Youth & Family Services (YFS) tested an enhanced co-facilitation approach in SIMR that included regular planning sessions between co-facilitators. Since YFS was new to the enhanced co-facilitation approach, they were initially interested in learning

What is SIMR?

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

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

Through SIMR, Mathematica and its partner, Public Strategies, collaborated with 10 HMRE grant recipients (five that serve adults and five that serve youth) to engage in iterative, rapid cycle learning aimed at strengthening services. These grant recipients are funded by the Office of Family Assistance from 2020–2025. Through this work, grant recipients cocreated, tested, and refined promising strategies to address recruitment, retention, and content engagement challenges.

The study had two main goals: (1) to improve the service delivery of grant recipients in the study and (2) to develop lessons for the broader HMRE field about promising practices for addressing common implementation challenges. For more information about SIMR, see the Office of Planning, Research, and Evaluation SIMR web page.

how facilitators could work together successfully to deliver curricula to students, and they iterated on their new approach throughout the test. YFS asked questions to learn more about how the regular planning sessions were working, including *How easy or hard was it for facilitators to meet with each other weekly? What types of things did co-facilitators discuss? How helpful were these planning meetings in building facilitator confidence? How helpful were they in terms of youth engagement?* Grant recipients can develop learning questions about individual components of the strategy, as YFS did with its planning session strategy, or about outcomes service providers hope to see, such as high levels of engagement among youth in the workshop.

Use data to learn about challenges

Although this brief focuses on using data to inform rapid learning cycles, data can be useful throughout the CQI process. A key upfront step in the CQI process is to identify and break down challenges to understand the underlying drivers of the challenge. Existing and new data can be used to learn about challenges and inform strategies to address them. To learn about challenges, grant recipients can:

1. **Use existing data.** nFORM (the Information, Family Outcomes, Reporting, and Management system) is a data system used by HMRE grant recipients to collect, store, and analyze data on client backgrounds, participation, and outcomes. Grant recipients can dig into their data to develop answers to questions such as *What is challenging? When or where is it a challenge? Who is experiencing the challenge?* For instance, More Than Conquerors, Inc., a grant recipient that worked on strengthening its approach to case management in SIMR, explored nFORM data from prior years to understand the volume of referrals case managers provided.
2. **Gather additional information.** To fully understand a challenge and its drivers, grant recipients should gather perspectives and insights from the people experiencing the challenge. To do so, grant recipients can use interviews, focus groups, or short surveys. Family Service Agency of Santa Barbara (FSA-SB), for example, conducted focus groups with Spanish-speaking men to understand their challenges to enrolling in and attending classes. FSA-SB staff used the feedback they received from participants to inform the design of their strategy to improve programming.

Recommendation

Testing a strategy using rapid cycle learning starts with creating **specific learning questions**. To determine the right learning questions, it can be helpful for grant recipients to define the strategy they want to test, specifying what the strategy entails, interim changes they expect to see as a result of implementing the strategy, and what ultimate success looks like. This is akin to developing a rationale for why the grant recipient believes a strategy will support improvement, which is one step in the Healthy Marriage and Responsible Fatherhood CQI plan template.

Learning questions in a pilot test should be related to the feasibility of and experiences with implementation, as well as promise of the strategy. For example:

- Did staff implement the strategy as intended? Why or why not?
- What were participants' experiences with the strategy?
- What changes are we seeing in short-term outcomes (for example, number of referrals from priority or ratings of participant engagement)?

Once service providers know their learning questions, they can create plans for collecting data by considering what information is needed to answer those questions and the easiest way to collect that information.

By documenting key learning questions, grant recipients can develop a clearer vision for what data they need to collect and which indicators to track. After selecting which indicators to track, setting initial benchmarks will help grant recipients to assess their starting point and future progress (see box). Table 1 presents qualitative and quantitative indicators grant recipients might use to learn about a strategy to improve programming.

Recommendation

After selecting which indicators to track, setting initial benchmarks will help grant recipients to assess their starting point. For example, setting a goal of recruiting 20 participants this month—and monitoring your progress toward meeting that goal—will help staff to assess the success of new recruitment strategies.

Table 1. Examples of key indicators to track

Strategies	Indicators to understand how a strategy is being implemented	Indicators to explore whether a strategy appears to be working
Recruitment strategies	• Number of community events held (by location) • Number of prospective participants reached (by event) • Number or frequency of recruitment-focused social media posts	• Number of referrals (by source) • Number of enrollments (by source) • Conversion rate of referrals to enrollment (number of enrollments divided by number of referrals)
Retention and content engagement strategies	• Number of service contacts • Number of supports or incentives offered • Number or frequency of facilitators using new technique	• Rating of participant satisfaction • Participant engagement level (assessed via observations or self-report surveys) • Staff ratings of workshops

Tip 2. Gather data to assess progress toward your goals

To ensure data collection is as streamlined and minimally burdensome as possible, grant recipients should first explore opportunities to use existing data before collecting new data. To do so, grant recipients can see if the data is in nFORM or another internal data system. Existing information that might answer learning question(s) could include quantitative data, such as attendance records, or qualitative data, such as case notes.

How grant recipients in SIMR used or refined existing data collection processes

Grant recipients in SIMR explored data they already had, such as data from nFORM, before considering what new data to collect. For example, grant recipients that focused on bolstering recruitment in SIMR tracked the growth of referral partnerships using the referral source information from the nFORM Applicant Characteristics Survey. When existing data was not available or sufficient, teams considered integrating new data collection into their existing processes or forms. Family Service Agency of Santa Barbara and Texas A&M Agrilife, for example, refined intake forms to collect information about where participants had heard about HMRE services (for example, from a word-of-mouth referral from a previous participant).

Grant recipients should ensure that new data collection is feasible and minimally burdensome for staff to collect. For instance, to assess participant engagement in a measurable way, staff might track how many people participate in workshop discussions. One way to enhance the feasibility of data collection is to limit it to only the most important information needed to inform next steps. For example, a grant recipient testing a strategy to improve retention by starting weekly outreach calls to all participants *could* develop a detailed call log and ask staff to enter data into it after each call. A more feasible alternative, however, could be to ask staff to document the participants on their caseload that they reached out to in a tracker once a week.

Recommendation

Build **low-burden** data collection tools and processes that fit into a grant recipient's existing systems. To reduce burden on staff, grant recipients may consider how they can modify existing forms to start tracking useful data points related to a strategy.

Useful tool

Tailor **trackers** or **observation tools** (such as those in Appendices A and B) to measure how improvement strategies are working. Grant recipients may identify a staff member who will consistently update the tools.

MotherWise used a tracker to document participant engagement

In SIMR, University of Denver's MotherWise program focused on enhancing participant engagement using The Nest, a private social media and messaging app for current participants and graduates. To monitor activities on The Nest, MotherWise staff used a tracker to document the type of posts and outcomes of the posts. Each week, staff reviewed the tracker to identify which posts prompted the most responses and how many participants completed their weekly assignments.

Grant recipients might use an internal data system or spreadsheet(s) to track information related to their key indicators. For example, four HMRE grant recipients involved in SIMR used a data tracker to monitor activities and early outcomes related to recruitment (see Appendix A). The grant recipients that focused on strengthening recruitment used this data tracker to document communications and interactions with their partners, as well as referrals received from them. The boxes on this page describes how grant recipients involved in SIMR used strategy-specific trackers or workshop observations (see Appendix B) to measure participant engagement.

Montefiore Medical Center used observations to understand engagement with virtual tools

Montefiore Medical Center developed strategies to better engage participants in virtual workshops and build facilitators' skills using virtual tools. To assess participant engagement and understand facilitator's implementation of virtual engagement strategies, Montefiore used an observation tool and collected data on a sample of workshops (see Appendix B).

Tip 3. Gather feedback from staff, participants, and partners to inform refinements

Grant recipients in SIMR collected feedback from participants, staff, and partners to gather information about why strategies did or didn't work. Collecting feedback from diverse perspectives promotes inclusive and equitable program improvement.[1] Grant recipients can collect feedback through specific data collection activities, such as interviews, focus groups, and surveys, or through regular interactions, such as staff and partner meetings.

Grant recipients involved in SIMR gathered data from different groups of people using short and focused data collection tools. For example, YFS used exit tickets, or short surveys, at different points during the semester to gather students' feedback on their strategies (see example below). Other grant recipients in SIMR, Gateway and Anthem, used online surveys to gather information about participant satisfaction with the HMRE services offered (see Appendix C).

Useful tool

Consider developing and sending a short **partner survey** to gather feedback from referral partners (see Appendix C). This survey might ask for partner feedback on the strength of the partnership and their understanding of the referral process. Grant recipients can use insights from existing partners to refine their outreach strategies to new partners in the community.

YFS used student feedback to inform planning

To assess the success of the co-facilitation strategies YFS was testing, facilitators administered exit tickets, or short surveys, at the end of each class. The exit tickets asked youth about their level of engagement with the day's class and any barriers to engagement. Facilitators reviewed open-ended feedback immediately after classes to understand changes they could make in the next class. YFS staff also compiled and reviewed exit ticket data during weekly team meetings.

YFS staff found that these data were useful for guiding facilitators' discussions of the results and next steps. If they saw ratings were low for one lesson, for example, they were able to discuss challenges with that particular lesson.

Illustrative example:

- **Observation:** Students in multiple classes rated their engagement lower in Week 6 than other sessions. In Week 6, the curriculum covers healthy communication and the speaker-listener technique.
- **Interpretation:** Facilitators hypothesized that youth reports of engagement was lower because the topic was somewhat abstract, and adding more examples that they could relate to may improve engagement
- **Action:** Bring in real life examples and allow students to debate using the speaker-listener technique.

Grant recipients can also explore opportunities to collect informal feedback from staff, participants, and partners. Staff reflections during regular team meetings are a useful informal and low-burden feedback opportunity. Use human-centered design activities to structure debrief sessions so staff can reflect on improvement strategies. For example, each time YFS implemented the co-facilitation approach at a new school, staff held a debrief session including an activity to reflect on what went well and what could

Useful tool

Consider setting aside time in regular staff meetings for reflection on improvement strategies. Service providers can incorporate a plus/delta activity to compile staff perceptions related to strategy success and challenges in a systematic way (see Appendix D).

[1] Loper 2021

be improved about their strategies moving forward. Staff meetings are also a useful opportunity to hear about and record anecdotal feedback from participants, such as comments or suggestions staff hear during one-on-one conversations (for example, “I never know where to find your workshop schedule”). Systematically documenting impromptu feedback might involve using a shared document to keep track of successes, challenges, and opportunities related to a strategy.

Tip 4. Interpret findings with your team

Assessing a strategy to improve programming often involves collecting data from multiple sources—for example, quantitative data that illustrates what happened and qualitative that indicates why it happened. Accordingly, a comprehensive data collection plan might include data from a variety of sources, including nFORM, trackers, and interviews. Synthesizing the data collected across sources enables grant recipients to draw conclusions about tested strategies and inform next steps. A synthesis matrix (such as this example from the HMRF Best Practices Series) is a helpful tool to organize data from different sources.

MotherWise compiled data from multiple sources to assess a strategy

MotherWise tested a strategy of using prerecorded videos in live virtual sessions to deliver some of the curriculum content. To assess the level of participant engagement with the videos they conducted several activities:

- Staff collected data on participant engagement during workshops using a standardized observation tool.
- Facilitators also completed surveys describing their perceptions of participant engagement after every session.
- Facilitators participated in interview after all the sessions were completed and provided feedback on which videos supported higher levels of engagement.

The data from four cohorts were compiled and organized by workshop session to assemble key findings by video topic. This multipronged data collection approach enabled MotherWise to capture insights from different perspectives and at different points in time—which ultimately provided the grant recipient with a comprehensive picture of how the videos affected participant engagement.

After concluding a rapid learning cycle, the CQI team should meet to reflect on the data collected and strategize about next steps. One useful facilitation structure to use in data reflection meetings is What? So What? Now What? Grant recipients can generate conclusions about data collected by asking staff to reflect on each of the following questions:

- **What?** Ask staff to review a set of data and share their observations. This step is focused on describing what the data shows—not drawing conclusions.
- **So what?** Ask staff to reflect on why the observed patterns matter. This step takes the conversation further by asking staff to reflect on what the findings mean for service provision.
- **Now what?** Based on the discussion, ask staff to consider tangible action steps. Be sure to assign responsibility and timing expectations for each next step.

Putting tips into action

This brief provides examples of measures and data collection methods that HMRE grant recipients in SIMR used to learn about their strategies in rapid learning cycles. HMRE grant recipients can consider using these examples to develop their own indicators and tools to strengthen their CQI efforts. By strengthening efforts to address key recruitment, engagement, and other implementation challenges, grant recipients can improve their services and their ability to meet the needs of their participants.

For more information

HMRE service providers can find more information about the SIMR study, including the interim report, final report, and practitioner guides, on the Office of Planning, Research, and Evaluation SIMR web page. Additional tools for using data in HMRE services are available on the Healthy Marriage and Responsible Fatherhood resource site, including:

- Examine recruitment and enrollment with nFORM infographic
- Examine recruitment and participation with nFORM tip sheet
- Synthesis matrix tool for reflecting on data
- Using focus groups to support CQI tip sheet

References

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Appendix A. Example Data Tracker

This is an example of a data tracker that grant recipients used in SIMR. Several recruitment-focused grant recipients used trackers to understand and assess partner relationships. Other grant recipients should tailor data trackers to their specific strategies, tracking activities, and results.

Exhibit A.1. Example of a data tracker

Partnerships tracking									
Description						Activity	Results		
Partner organization name	Primary contact	Contact information	Monthly service number	Engagement level	Partnership agreement	Frequency of contact	Referral partner commitment per month	Actual referrals this month	Follow up with partner required
Head Start	*Jane Doe*	*123-456-7890; jane@headstart.org*	*100 families*	*For example, prospective, willing, supportive, engaged*	*For example, informal, contract, memorandum of understanding*	*Biweekly*	*10*	*12*	*No*

To learn more about partner engagement levels used in SIMR, see the SIMR brief, *Tips for Leveraging Partnerships to Improve Recruitment for Healthy Marriage and Relationship Education Programs*.

Appendix B. Example Observation Template

Exhibit B.1. Example of an observation template

Overall facilitation	**Observation** (select from: Strongly disagree, disagree, neutral, agree, or strongly agree)	**What did you see during the session that contributed to your rating?**
The facilitators used technology (including the video, if applicable) without experiencing issues or disruptions within their control.		
The facilitators encouraged participants to turn on their cameras and allowed them to turn the camera off at different points.		
The facilitators encouraged participants to use the chat and other virtual tools.		
The facilitators engaged all participants in the discussion (for example, encouraged all participants to share, answer questions, and talk with one another, and took steps to keep some participants from dominating the conversation).		
The facilitators seemed attuned to the participants in the session (for example, demonstrated active listening and appeared to be responsive to participants' energy levels).		
The facilitators worked together well to co-facilitate the workshop (for example, each had a good dynamic and split responsibilities equitably).		
Overall participation	**Observation**	**What did you see during the session that contributed to your rating?**
Most **participants** were **on camera** for a majority of class.		
Most **participants joined the session by computer**, rather than tablet or phone.		
Participants **volunteered** to answer questions or **share** with the group.		
Participants **used the chat or other virtual tools** to respond to a prompt or to volunteer something.		
Participants **demonstrated interest** by asking **questions**.		
Participants had **limited distractions** in their environment.		
Participants appeared to be **listening to the information** (for example, if participants were on camera, they looked at the screen during the lesson, rather than off camera).		

Appendix C. Example Partner Survey from Anthem Strong Families and Gateway Community Action

The goal of this survey is to obtain your perspective on your partnership with [PROGRAM]. The survey should take no more than five minutes to complete. Completing this survey is voluntary, and your responses are anonymous. You may skip any question on this survey; however, we appreciate your comprehensive feedback.

1. Please select the statement that best describes your current involvement with [PROGRAM NAME].
   - ❍ This is a new partnership.
   - ❍ I have an established relationship with [ORGANIZATION] but not with the [PROGRAM].
   - ❍ I have an established relationship with [ORGANIZATION]'s [PROGRAM] only.
   - ❍ I have an established relationship with [PROGRAM] and [ORGANIZATION]'s other programs.

2. When you first began developing a relationship with [ORGANIZATION/PROGRAM], what are some things that worked well in terms of establishing your partnership? (Please select all that apply)
   - ❑ Our agency regularly received materials that provided updates and information on [PROGRAM] services.
   - ❑ We had good communication with [PROGRAM] as we were developing our partnership (for example, we had regular communication, and they responded to our agency's needs).
   - ❑ Our agency had shared goals and objectives as we were developing our partnership.
   - ❑ Our long-term mission is aligned with [PROGRAM]'s strategic priorities.
   - ❑ The roles and responsibilities of our partnership were clearly laid out.

3. Thinking about your working relationship with [PROGRAM], please rate your agreement with the following statements. Select one per row.

Statement	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	DON'T KNOW
a. Our agency regularly receives materials that provide updates on [PROGRAM].	1. ❍	2. ❍	3. ❍	4. ❍	5. ❍	d. ❍
b. [PROGRAM] is able to respond to our organization's needs, questions, and concerns.	1. ❍	2. ❍	3. ❍	4. ❍	5. ❍	d. ❍
c. Our agency has a productive partnership with [PROGRAM] in which our mutual goals are met.	1. ❍	2. ❍	3. ❍	4. ❍	5. ❍	d. ❍
d. Our agency has a clear referral process with [PROGRAM].	1. ❍	2. ❍	3. ❍	4. ❍	5. ❍	d. ❍
e. Our agency regularly meets or checks in to discuss progress on recruitment goals.	1. ❍	2. ❍	3. ❍	4. ❍	5. ❍	d. ❍

Statement	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	DON'T KNOW
f. [PROGRAM] understands the priorities of our agency and helps support our mission.	1. ❍	2. ❍	3. ❍	4. ❍	5. ❍	d. ❍
g. The roles and responsibilities of our partnership with [PROGRAM] are clear.	1. ❍	2. ❍	3. ❍	4. ❍	5. ❍	d. ❍
h. The purpose, vision, and objectives of our partnership with [PROGRAM] are fully shared by all levels of staff and management.	1. ❍	2. ❍	3. ❍	4. ❍	5. ❍	d. ❍

4. How often do you communicate with [PROGRAM] staff or receive updates on the program?
   - ❍ At least once a week
   - ❍ At least once every two weeks
   - ❍ At least once a month
   - ❍ At least once every quarter
   - ❍ Once a year or less often

5. What type of things do you communicate with [PROGRAM] staff about? (Select all that apply)
   - ❑ We discuss participant referrals.
   - ❑ We discuss participant progress.
   - ❑ We discuss systems or processes for tracking recruitment efforts.
   - ❑ We discuss future partnership events, engagements, and recruitment opportunities.
   - ❑ We discuss other matters not related to our mutual partnership.
   - ❑ Other____

6. Have you referred any participants to [PROGRAM]?
   - ❍ Yes
   - ❍ No

7. Has [PROGRAM] referred any participants to your organization?
   - ❍ Yes
   - ❍ No

Appendix D. Suggested Debrief Activities for Gathering Staff Feedback

This appendix contains a selection of debrief activities that SIMR grant recipients used to gather feedback from staff on improvement strategies. Staff debriefs are a low-burden data collection activity that can provide useful information about staff experiences with and perceptions of improvement strategies. Grant recipients can use these activities with participants during workshops as well.

Plus/delta activity

- Give all staff at least four sticky notes.
- Ask staff to identify at least two pluses. These should be things that worked well related to the strategy, or things staff want to maintain and build on.
- Ask staff to identify at least two deltas. These should be opportunities for improvement. Instruct staff to be specific and realistic when identifying opportunities to improve.
- Have staff place their sticky notes in the pluses and deltas columns (see example below). Use affinity clustering, or grouping of like themes, to combine sticky notes that are similar.
- Review the activity for key themes. Discuss themes with the group.

Pluses (+)	Deltas (∆)

I like, I wish, I wonder activity

- Give staff at least three sticky notes.
- Write "I like, I wish, I wonder" as three separate column headings on a whiteboard or large sheet or paper.
- Ask staff to fill out one sticky note for each heading.
  - I like: Something about the strategy that worked well or was positive
  - I wish: A suggestion about what could be done differently or improved
  - I wonder: Unanswered questions or what staff still need to learn
- Have staff place sticky notes under the I like, I wish, and I wonder headers. Cluster the sticky notes into similar themes using affinity clustering.
- Review the themes and synthesize the feedback:
  - What can be improved?
  - What works well?
  - What are the next steps?

Source: Hyper Island Toolbox.