Building data capacity in Healthy Marriage and Responsible Fatherhood grantees: Challenges and recommended support

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Exhibits

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Acronyms

ACF	Administration for Children and Families
FPS	Family Assistance Program Specialist
HM	Healthy Marriage
HMRF	Healthy Marriage and Responsible Fatherhood
nFORM	Information, Family Outcomes, Reporting, and Management, a web-based data collection system for HRMF grantees
OFA	Office of Family Assistance
RF	Responsible Fatherhood
TA	Technical assistance

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I. Introduction

Strong, supportive families protect and promote children's health and well-being. For nearly 20 years, the Administration for Children and Families (ACF) has led a sustained federal effort to develop, document, and evaluate healthy marriage and responsible fatherhood programs (HMRF), especially among low-income families. Since 2005, Congress has funded $150 million each year in healthy marriage (HM) and responsible fatherhood (RF) grants. The Office of Family Assistance (OFA) within ACF under the U.S. Department of Health and Human Services (HHS), has awarded and overseen three cohorts of these grants (2006–2011, 2011–2015, and 2015–2020).[1] HM grantees promote healthy marriage and relationships through eight legislatively authorized activities, such as marriage and relationship education and activities to promote skills such as job and career advancement. RF grantees' legislatively authorized activities promote responsible parenting, healthy marriage, and economic stability. HMRF services are most often a series of group-based educational workshops and individual service contacts, such as case management. OFA works with ACF's Office of Planning, Research, and Evaluation (OPRE) to conduct research on how to best serve families through these grants.

High quality data are essential to supporting ACF's learning agenda for HMRF grantees. Data are critical for systematic program monitoring and improvement, evaluation to learn what works, and building the field's knowledge base. However, collecting, analyzing, understanding, and using data can be challenging for many grantees and their staff. Frontline staff—who typically focus on serving and interacting with clients—may particularly benefit from training and support related to collecting and using data.

The Fatherhood and Marriage Local Evaluation (FaMLE) Cross-Site team collected information from the 2015 HMRF cohort to help ACF better understand their **data capacity** challenges (Box I.1) and to recommend a technical assistance (TA) approach to support future cohorts of HMRF grantees. Drawing on a variety of sources, the team identified grantees' data capacity needs and developed an array of recommended TA activities to strengthen their data capacity. This report summarizes the team's methods, the grantees' challenges, and the recommended TA activities that could be implemented in future cohorts of grantees to improve data capacity.

Box I.1. What is data capacity?

Data capacity is a grantee's ability to collect, analyze, understand, and use both data on its own grant programs and data from other sources (such as peer-reviewed literature or reports from federal evaluations).

[1] OFA supports the 2015 cohort under three grant programs: Healthy Marriage and Relationship Education (ACF 2015a), New Pathways for Fathers and Families (ACF 2015b), and Responsible Fatherhood Opportunities for Reentry and Mobility (ReFORM; ACF 2015c). Throughout the report, we refer to Healthy Marriage and Relationship Education as HM and New Pathways and ReFORM as RF, and to the overall program as HMRF grants.

A companion report (Strong et al. 2020) summarizes recommendations for improving data about HMRF grantees. The report focuses on performance measures, which are a key data source for ACF and grantees to monitor performance and progress; functionality of the management information system developed for HMRF grantees, called nFORM (Information, Family Outcomes, Reporting, and Management); and the TA activities to support future grantees in collecting the measures and using nFORM. The current report describes grantee challenges and TA recommendations for collecting, analyzing, understanding, and using performance measures and other data.

A. Report road map

The remainder of this report is organized as follows: Chapter II is an overview of the 2015 HMRF cohort, including ACF's grantee requirements and the various supports the grantees receive; Chapter III describes the methods and process the study team used to identify data capacity challenges faced by the 2015 HMRF cohort and develop a recommended TA approach for future grantee cohorts; Chapter IV describes the challenges that were identified; Chapter V ends the report with a presentation of the study team's recommended TA approach. Appendix A describes the recommended TA activities included in the approach. The appendix has more details about each activity, including the challenge it addresses, the timing of TA, and the resulting outputs and outcomes of TA.

II. Overview of 2015 HMRF Grantee Cohort

To support healthy families and children, HM and RF programs can offer a variety of grantee program activities (Box II.1). The primary service for both HM and RF grantees is group-based workshops, which typically range from a few days to a few months in length. Under the 2015 Funding Opportunity Announcement, grantees were also required to offer case management (unless they received an exemption from ACF). In case management, clients get individualized attention and might receive referrals to other services. HM and RF grantees can each serve from one to three populations (Box II.2).

There are 85 grantees in the 2015 cohort (45 HM grantees and 40 RF grantees), located in 29 states and Guam. All grantees are required to collect and report performance measures on their

Box II.1. Grantee program activities

HM

1. Education in high schools
2. Marriage and relationship education skills
3. Premarital education
4. Marriage enhancement
5. Divorce reduction
6. Marriage mentoring
7. Reduction in disincentives to marriage
8. Employment and education activities

RF

1. Responsible parenting
2. Economic stability
3. Healthy marriage and relationship education

Box II.2. HM and RF target populations

HM

- **Adult individuals:** Adults without a partner, regardless of whether they are in a romantic relationship.
- **Adult couples:** Adults with their romantic partner.
- **Youth:** Youth ages 13 to 30; programs might be offered in schools (such as part of a health curriculum) or other settings.

RF

- **Community fathers:** Adults without a partner, regardless of whether they are in a romantic or coparenting relationship.
- **Community couples:** Adults with another individual, who could be their romantic partner or coparent of their child.
- **Incarcerated fathers:** Adults who were incarcerated and scheduled to be released within three to nine months or who had been released up to six months earlier. Programs are often offered in a prison or jail.

program operations and the clients they serve (see next section). A subset of 33 grantees received additional funding to conduct a local evaluation, defined by ACF as an evaluation to answer grantee-specific research questions.

Each evaluation is led by an independent local evaluator and can be conducted as either an impact study or a descriptive study. All impact studies are required to use a comparison or control group, whereas descriptive studies examine the characteristics of clients served by the program before and after receiving services, and no comparison group is used.

A. Overview of performance measure data and their uses

Data on performance help ACF and grantees monitor a program's progress and analyze and improve its performance. Grantees are responsible for collecting all performance measure data and entering those data in a web-based system called nFORM. Respondents include grantee staff members and clients (that is, the adults or youth served by the programs). Below, we describe each type of data and uses for performance measure data.

Box II.3. Overview of nFORM

Under ACF's direction, the FaMLE Cross-Site team developed the nFORM system for the 2015 cohort of HMRF grantees to collect, analyze, and report performance measure data. For example, grantees use nFORM to document services, report on program operations (such as outreach, recruitment, and implementation challenges), track client participation in services, and administer surveys to clients about their characteristics and outcomes. Clients complete web-based surveys directly in nFORM. nFORM supports grantees' data analysis through automated calculations for required reports, data visualizations, and a data export function.

1. Data from clients

Grantees ask each client to complete three surveys as they progress through the program. Each survey is designed to be completed by the clients themselves in 15 to 25 minutes. Clients have the option of listening to the survey questions and having response options read to them through a recording.

The three surveys are as follows:

1. **Applicant characteristics survey (ACS).** Clients complete the ACS at enrollment. Questions cover topics such as demographic characteristics, financial well-being, and family status.
2. **Entrance survey.** Clients complete the entrance survey at the first workshop session they attend. Questions cover topics such as parenting, coparenting, relationships, and economic well-being. Depending on the specific population served by their program, clients respond to one of four different versions of the entrance survey: HM adults, HM youth, RF community fathers (also completed by couples served in RF programs), and RF incarcerated fathers.
3. **Exit survey.** Clients typically complete the exit survey at the final workshop session. As with the entrance survey, clients respond to one of four different versions of the survey depending

on population served by the program. Most questions follow up on entrance survey questions. The exit survey also has questions about clients' perceptions of the program.

2. Data from grantees

Grantee staff must provide two types of data for performance measurement and two types of reports. The data sources and reports completed by grantee staff are:

1. **Services and referrals.** Grantee staff must enter data on all services they provide to clients, such as workshops and case management, directly into nFORM. This includes reporting how many clients received a particular service, the type and duration of the service, and the staff who offered the service. Grantees must also enter any referrals for services or incentives for program participation.
2. **Program operations survey.** Each quarter, one staff person from each grantee completes a program operations survey in nFORM. Questions cover topics such as recruiting methods, staff characteristics, quality assurance and monitoring, and implementation challenges.
3. **Quarterly progress reports (QPRs).** In the first and third quarters of the fiscal year, grantees complete a QPR that covers their activities in the quarter. The QPR includes automated calculations from nFORM, which draw from the sources described earlier (for example, client surveys), and a narrative section in which grantees describe program progress and issues.
4. **Semiannual performance progress reports (PPRs).** In the second and fourth quarters of the fiscal year, grantees complete a PPR. The second-quarter PPR covers the previous six months of grantee activities, and the fourth quarter PPR covers the entire grant year. As with the QPRs, the PPRs include calculations from nFORM and a grantee narrative.

3. Performance measures uses

Both ACF and grantees can use performance measures to monitor and improve their programs.

Monitoring. Performance monitoring is the process of tracking and reporting progress toward pre-established program goals. ACF and grantees analyze performance measure data to assess progress on key metrics of interest. Those metrics can be defined by ACF or by the grantees themselves (for example, metrics set to gauge program improvement efforts).

Continuous quality improvement (CQI). CQI is identifying, describing, and analyzing strengths and problems and then testing, implementing, learning from, and revising solutions. Through CQI, grantees use performance measure data to identify specific areas to improve. Grantees then develop targeted goals and strategies to address these areas, quickly implement and test the strategies, and monitor and analyze the resulting improvements.

B. Support and technical assistance

For the 2015 cohort of HMRF grantees, ACF has provided several types of support and TA. Each grantee works with a family assistance program specialist (FPS) in OFA, who provides guidance and oversight. FPSs meet regularly with grantees to monitor their performance and offer support. ACF has also contracted with two organizations to provide the following four types of TA, which the FPS coordinates:

1. **Programmatic:** The 2015 cohort of HMRF grantees receive TA from an assigned liaison at Public Strategies (a federally funded TA contractor), who helps them address programmatic issues they are encountering and supports the delivery of high-quality services. Through informational resources, webinars, conference sessions, peer learning, and individualized phone calls and site visits, grantees receive TA related to staffing and supervision, enrollment, provision of individual and group services, and a variety of other topics related to programmatic decisions and operations.
2. **Performance measures, data collection, and nFORM**: The nFORM TA team at Mathematica (a federally funded TA contractor) provided ongoing training and TA to the 2015 grantee cohort and developed written resources. The supports cover data collection procedures, entering and reviewing information in nFORM, and ways that grantees can use nFORM data to inform programmatic decisions. Grantee staff can receive TA by accessing informational resources available on the nFORM help page, participating in webinars and office hours, attending conference sessions on nFORM, participating in one-on-one phone calls with a member of the nFORM team, and submitting questions to the nFORM virtual help desk for more assistance on performance measures and nFORM.
3. **CQI:** TA for CQI includes resources available to the entire 2015 cohort of grantees, including written documents (such as a CQI plan templates and tips for working with an implementation team), webinars, and conference sessions. A subset of grantees work one-on-one with a Mathematica CQI liaison to develop and hone their CQI process.
4. **Evaluation:** Grantees funded in 2015 that are conducting evaluations also receive evaluation TA through regular meetings with an assigned local evaluation liaison at Mathematica. The evaluation TA team also provides group-based TA, such as webinars or presentations, for issues common to all grantees. The focus of the TA evolves depending on grantees’ needs and the stage of the evaluation, such as planning random assignment, increasing consent rates, or analyzing data.

III. Methods

To understand the data capacity challenges faced by the 2015 grantee cohort and develop a recommended TA approach for future grant cohorts, the FaMLE Cross-Site team sought input from multiple grantees and stakeholders. The team used a variety of data collection activities, including focus groups, an interactive session at the annual HMRF grantee conference, and a review of help desk tickets from nFORM. The team also developed a **data capacity framework** to guide data collection and analysis. This chapter first describes the data capacity framework, then the data collection activities and approach to analysis.

A. Data capacity framework

To guide its work, the FaMLE Cross-Site team developed a data capacity framework to capture the factors that influence individuals' and organizations' capabilities and comfort levels with using data. The framework is based on two data-driven decision-making guides (Gill et al. 2014; James Bell Associates 2018) and the Implementation Drivers Framework from the National Implementation Research Network (Fixsen et al. 2015). The team identified the two guides (Gill et al. 2014; James Bell Associates 2018) through a targeted search of literature related to data capacity, and combined components of both guides to begin creating the data capacity framework. These guides identified many individual and organizational factors related to data and their use, but they lacked some dimensions of organizational supports for staff who interact with and use data—such as hiring, supervision, and coaching or professional development. To capture these dimensions, the team identified aspects of the Implementation Drivers framework and added them to the data capacity framework.

The data capacity framework has six broad categories, each encompassing several subcategories (Exhibit III.1):

1. **Data infrastructure***:* The physical resources, procedures, and protocols necessary to (1) reliably and accurately collect data and (2) safely and securely store and access data.
2. **Analytic capabilities:** How grantees identify and measure outcomes, constructs, and concepts of interest. This category also captures physical resources related to analysis (for example, software); procedures; and the necessary staff capabilities to prepare data for analysis, conduct analyses, and correctly interpret the results.
3. **Data usage:** How grantees use or apply the results from the analyses for internal and external purposes.
4. **Culture of data and research:** How grantees promote a culture in which they use data and value research. This category mainly includes policies and procedures pertaining to hiring, training, and supervising staff who interact with and use data. This category also gives a view of the grantees' program and organization as whole, focusing on data-driven decision making and the partnerships that influence research or data collection.

5. **Understanding funders' requirements:** How grantees understand and apply the funding requirements for research and for collecting and using data.
6. **Integrating TA:** How grantees understand and integrate the programmatic and evaluation TA related to research and collecting and using data.

Exhibit III.1. Data capacity framework: categories and subcategories

Category	Subcategory	Description
Data infrastructure	Data collection procedures and protocols	How grantees develop and implement their data collection procedures and protocols
	Data quality assurance	How grantees ensure the data they collect are reliable and accurate
	Data storage	How grantees store their data
	Data security	How grantees protect the client information they collect
	Technology	How grantees use technology to collect data
	Data accessibility and extraction	How grantees obtain and extract their stored data for use
Analytic capabilities	Construct and outcome identification	How grantees decide on the various constructs and outcomes of interest
	Measurement	How grantees decide to measure their constructs and outcomes of interest
	Data cleaning and preparation	How grantees prepare their data for analysis
	Analytic tools	How grantees use software or other technology to conduct their analyses
	Analytic methods	The types of statistical methods grantees use for analysis
	Interpretation of results	How well grantees understand and apply the results of their analyses
Culture of data and research	Staff hiring	How grantees identify potential staff and evaluate their abilities related to data capacity
	Staff training	How grantees train their staff related to data capacity
	Leadership	How grantee leadership supports data capacity
	Supervision	How staff are managed and monitored in relation to data capacity
	Coaching and professional development	How grantees support staff's growth related to data capacity
	Organizational decision making	How the grantee's organization uses data to make programmatic or organization-wide decisions.
	Partners and partnerships	How grantees involve partners in collecting, using, or interpreting data

Category	Subcategory	Description
	Program implications and integration	How grantees integrate data collection into their programming and interactions with clients
Understanding funder requirement	Policies and procedures	How grantees interpret and apply the policies and procedure from ACF or other funders
Integrating technical assistance	Programmatic	How grantees interpret and integrate programmatic TA and how the application influences data capacity
	Evaluation	How grantees interpret and integrate evaluation TA and how the application influences data capacity

The FaMLE Cross-Site team used this data capacity framework to guide the data collection and analysis activities for this report. For example, the team constructed the focus group protocols (described below) to include questions about each category and subcategory (when appropriate). The team then organized the data into the framework's categories. For instance, if a grantee reported challenges administering surveys, the team would classify this under the data infrastructure category and under the subcategory of data collection procedures. After categorizing all feedback, the team reviewed findings to identify challenges and TA approaches for each category and subcategory (as appropriate) specified within the framework.

B. Data sources and data collection approach

The FaMLE Cross-Site team conducted three activities to assess grantees' data capacity needs: (1) a session at the 2019 HMRF grantee conference, (2) a review of nFORM help desk requests, and (3) focus groups. Through these activities, the team solicited feedback primarily from the 2015 HMRF grantees but also from the FPSs and TA providers (Exhibit III.2). Collecting input from multiple stakeholder groups enabled the FaMLE Cross-Site team to develop a multifaceted understanding of the issues grantees face and develop targeted strategies for supporting the next cohort of HMRF grantees. The following section describes each activity and its participants.

Exhibit III.2. Data collection sources and activities

	Source		
Activity	2015 HMRF grantee cohort	FPSs	TA providers
Session at 2019 HMRF grantee conference	✓		
Review nFORM help desk requests	✓		
Focus groups	✓	✓	✓

1. 2019 HMRF grantee conference session

The August 2019 HMRF conference devoted a session to having grantees identify their data and analytical needs and potential ways to fulfill them. This session's objectives were to (1) enable grantees to share their experiences using data and (2) suggest new ways for grantees to collect, manage, and use data in their organizations. ACF invited grantees' CQI leads and data managers and requested that a representative from each grantee should attend.

To encourage candid feedback and innovation, the FaMLE Cross-Site team's facilitators asked attendees to participate in two ACF-approved interactive activities, individually and in smaller groups. First, the facilitators asked attendees to individually list their successes and challenges with using data. Facilitators then had individuals share their lists in small groups and complete another activity to identify potential solutions to their common challenges. The facilitators asked attendees to create solutions for their challenges in eight categories: (1) nFORM, (2) surveys and performance measures, (3) trainings, (4) written resources, (5) one-on-one TA, (6) group TA, (7) a learning community, and (8) other ideas. Facilitators held a final discussion with the group as a whole to identify common challenges and solutions. Members of the FaMLE Cross-Site team took notes during whole-group discussion and captured the attendees' challenges and solutions by taking photographs of the materials the attendees produced during these activities for later review and analysis.

Using the notes and photos from the activities, the team reviewed and organized the challenges into themes and categorized them according to the data capacity framework. The team then reviewed the solutions and mapped them to the categorized challenges.

2. Review of data from the nFORM help desk

The team reviewed 776 nFORM help desk requests submitted from September 30, 2017, to September 29, 2019 (Grant Years 3 and 4). The team excluded nFORM help desk tickets submitted during the first 18 months of operation (nFORM was introduced in June 2016). Many requests during that time were about basic nFORM functionality as grantees became accustomed to the system. The requests in later years focused more on grantees' data capacity needs.

The team reviewed requests (outputted to an Excel file from the help desk) to identify common questions or themes, and used the data capacity framework to categorize them. The team also reviewed information on how each issue was resolved and determined (in tandem with other activities, such as focus groups) whether the current approach was adequate or an issue might warrant consideration for future TA.

3. Focus groups with federal staff and TA providers

To understand grantees' needs from the perspectives of those who work with them, the FaMLE Cross-Site team conducted three 90-minute focus groups. The first was with FPSs at OFA. Each FPS provides guidance and oversight to a group of grantees. Their close work with multiple grantees gives them both broad and in-depth perspectives of grantees' needs. The second and third focus groups were with staff contracted by ACF to provide TA to HMRF grantees. One focus group was with local evaluation training and technical assistance liaisons from Mathematica who support 33 grantees from the 2015 grantee cohort conducting evaluations. The other was with programmatic TA providers from Public Strategies, who support all grantees on program operations and processes.

The goals of the focus groups were to understand the FPSs' and TA providers' perspectives on (1) grantees' key challenges related to data capacity, (2) types of available support (both internal and external to what is provided through ACF), (3) topics and modes of TA that have been most effective, and (4) additional support that would be helpful. This information not only enabled the team to identify grantees' needs and potential ways to fill them, but also informed the topics explored during subsequent focus groups with grantees (described below).

Two FaMLE Cross-Site team members attended each group: one team member facilitated the discussion, and the other took detailed notes. The team recorded each focus group to ensure the accuracy of the notes. After each focus group, the team compiled the information into a document that highlighted the topics and themes discussed during the session along with their possible implications for analysis and recommendations.

4. Focus groups with grantees

The team conducted four focus groups with grantee representatives on topics guided by the data capacity framework. The discussion was also guided by information from the other data collection activities. For example, if TA providers or FPSs suggested seeking grantees' input on a particular topic, the team typically developed a question or questions on that topic in the protocol. The goal of the focus groups with grantees was to get a better understanding the data-related challenges that they encounter and the types of TA or support they would find helpful in building their data capacity.

Each virtual 90-minute focus group focused on a different data-related topic:

- nFORM, survey, and other data collection
- CQI
- Local evaluations
- Using research to inform implementation and programming

The team invited nine grantees to each focus group, using a multiphase process to select the grantees. First, the team asked the FPSs and TA providers to nominate two grantees for each topic area: one with only a few challenges in the area, and another that needed more support.

To supplement this list, the FaMLE Cross-Site team used data from the nFORM help desk. The team sorted grantees by ascending order of the number of help desk inquiries within the past two years, and organized them into top, middle, and bottom thirds. The categories represent the extent of help requested but not necessarily grantee capacity. For example, grantees in the top third of inquiries could struggle with using data or ask sophisticated questions that went beyond the capacity of existing TA resources. Similarly, those in the bottom third could have more internal data capacity or be overwhelmed or disengaged. The team randomly selected grantees from each third after removing the grantees previously nominated by the FPSs and TA providers.

After ACF approved the list, the team sent emails to the project director of each nominated grantee. Directors were asked to select the staff member most familiar with the topic to attend. Exhibit III.3 shows the number of grantees represented in each focus group. No grantee participated in more than one group.

Exhibit III.3. Grantees attending focus groups, by topic

Topic	Number of grantees in attendance
nFORM, survey, and other data collection	6
CQI	6
Local evaluations	4
Using research to inform implementation and programming	5
Total number of grantees represented	21

Two FaMLE Cross-Site team members attended each group: one team member facilitated the discussion, and the other took detailed notes. The team recorded each focus group to double-check the accuracy of the notes. After each focus group, the team compiled a document highlighting the information discussed during the session and their suggested implications for analysis and recommendations.

C. Analyzing data and identifying TA topics

The team used a systematic, group-based process to analyze the qualitative data they collected. The following outlines specific steps in the process:

1. The team created a spreadsheet that listed the framework category and subcategories as the columns, and the topics covered in the activities (for example, CQI, survey administration, or local evaluations) as rows. Each activity had a separate spreadsheet broken out by source (where appropriate).
2. The team reviewed the documentation from each activity and entered the relevant information into the spreadsheet.
3. The team used an inductive, group-based process called consensual qualitative analysis (Hill et al. 2005) to systematically identify themes across the data collection activities according to the data capacity framework. In this process, each team member was assigned a component of the framework and reviewed all data for all activities to identify themes specific to that component. The team members documented their findings in a master spreadsheet and met twice a week to discuss the emerging themes and reach consensus on the overall themes and examples from each activity and source. The team members first identified themes related to challenges. Next, they mapped TA approaches to each challenge, drawing heavily on specific

needs or wants mentioned during the data collection activities, and the TA activities currently conducted by the FaMLE Cross-Site team.

IV. Data Capacity Challenges

ACF expects grantees to collect high-quality data and use them to inform their services and conduct evaluations. However, grantees face challenges as they try to accomplish this. This section summarizes the challenges the FaMLE Cross-Site team identified from its analyses of data collected for the 2015 cohort of HMRF grantees. The challenges are organized by the categories in the data capacity framework. It is important to note that the scope of this report was to identify challenges. Over the grant years, the FPSs, FaMLE Cross-Site team, and TA providers observed many examples of grantees or their staff building their data capacity. Because the team asked the participants in the data collection activities for this report to focus solely on challenges, examples of grantees improving their data capacity are not included here.

A. Data infrastructure

The team identified two consistent challenges with data infrastructure (Box IV.1): (1) developing data collection procedures and protocols and (2) accessing nFORM.

Box IV.1. Data capacity framework: Data infrastructure defined

The physical resources, procedures, and protocols necessary to reliably collect and access high quality data. Subcategories include:

- Data collection procedures and protocols
- Data quality assurance
- Data storage
- Data security
- Technology
- Data accessibility and extraction

1. Developing data collection procedures and protocols

All grantees are required to collect data on performance measures, and some may collect additional data for program improvement efforts or local evaluations. Grantees would ideally develop a process for systematically collecting data, which many participants reported as a challenge.[2] Generally, challenges were greater for grantees that lacked data collection experience or operated in specific settings, such as schools or prisons. Without a plan in place, participants noted that some grantees were unable to systematically collect high quality data. Participants also discussed how extensive data collection at the beginning of a program can be off-putting to program clients. But few reported having plans and protocols for discussing the importance of data collection with clients to increase buy-in, or for administering surveys more efficiently. Other participants discussed struggling to create efficient and consistent data collection procedures when working with youth in schools or administering surveys in prisons.

[2] Through the remainder of the report, "participants" refers to the individuals who participated in the data collection activities for this report. People who are enrolled in HMRF programs are referred to as "clients."

2. Accessing nFORM

All HMRF grantees are required to use nFORM. Grantees enter information into the system, and nFORM tracks individual- and grantee-level data to produce a variety of reports. Across the FAMLE Cross-Site team's data collection activities, many participants commented that some grantee staff were not familiar with the technology involved in using nFORM. The team identified two types of technological challenges that were either internal or external to the grantee. Poor Internet connectivity, inadequate equipment, and staff discomfort and inexperience with technology were internal challenges. For example, some participants reported that they rarely used computers or other technology, such as tablets or smartphones. Some focus group participants discussed how their frontline staff had yet to master Microsoft Excel, and that nFORM was a far more advanced system comparatively. As result, these staff experienced difficulty, anxiety, and frustration accessing and navigating nFORM—particularly in the first years of the program.

External challenges were related to nFORM functionality, most notably nFORM system lags or disruptions in access. Many participants said these lags happened during periods of high-volume user access, such as the weeks before quarterly performance reports were due, when many grantee staff requested data extracts. Lags delayed grantee staff who sought to obtain and analyze the nFORM data extract to complete their quarterly reports.

B. Analytic capabilities

To take advantage of the data they collect, grantees need to have the resources and skills to manipulate and analyze the data (Box IV.2). They must also be able to accurately interpret the results from their analyses. The FaMLE Cross-Site team identified several analytic challenges facing grantees. The findings suggest that grantees face issues in five areas: (1) analyzing data, (2) working with multiple data systems, (3) using nFORM's reporting features, (4) understanding nFORM's calculations, and (5) prioritizing analyses.

Box IV.2. Data capacity framework: Analytic capabilities defined

How well grantees identify and measure outcomes, constructs, and concepts of interest. This category also captures physical resources; procedures; and the staff abilities needed to prepare data for analysis, conduct analyses, and correctly interpret the results. Subcategories include:

- Construct and outcome identification
- Measurement
- Data cleaning and preparation
- Analytic tools
- Analytic methods
- Interpretation of results

1. Analyzing data

Participants reported that some staff did not have the analytic skills necessary to do tasks such as data cleaning or creating variables, which program monitoring and other activities require. Although nFORM performs some calculations, such as clients' average amount of participation in workshops, grantees often need to export the data for more in-depth analyses. In addition, grantees might collect data outside of nFORM. Participants noted that staff often used Excel for analysis because they were unfamiliar with statistical packages such as SAS or SPSS. However, some staff had difficulty calculating counts or means in Excel, which limited their ability to monitor service delivery or do CQI. Others noted that cleaning and manipulating data was time consuming and cumbersome in Excel. Participants also noted that some local evaluators struggled to develop high quality analysis plans, such as plans for analyzing random assignment studies appropriately.

2. Working with multiple data systems

Grantees might use data systems in addition to nFORM to (1) collect information that nFORM does not track (for example, recruitment activities); and (2) meet state or other requirements (for example, a state-required child welfare system). Many participants said they were struggling to track data in multiple systems. Participants with multiple systems noted the burden of double or triple data entry, resulting in staff fatigue and data entry errors or missing data in one of the systems. Some participants discussed this in the context of developing a good data entry protocol—that is, the need for procedures to ensure efficient double data entry.

Participants also reported that figures, counts, and other metrics in the systems do not always match. They suggested that this could be due to inconsistent or unreliable data entry in one or more systems, or that the secondary system calculated a metric or variable differently from nFORM. Relatedly, some participants reported a lack of understanding of the calculations in nFORM or performance reports (discussed further below), a challenge that exacerbates the task of reconciling metrics across systems. Some participants also reported complications in dealing with unique client IDs in each system, making it difficult to reconcile information for the same person across systems.

3. Using nFORM's reporting features

nFORM allows grantees to create and access several different automated reports. Participants frequently reported a lack of understanding among some staff—from leadership to frontline staff—regarding the content of nFORM-generated reports and data extracts. For example, some participants discussed staff generating reports that did not contain the information they expected, which led to frustration. In a related issue, some participants reported using the data extract to compute the information already contained within a downloadable nFORM report. These participants reported their frustration in having used the extract and constructing an analysis file to later learn they could easily obtain this information from an operational report in nFORM. Some participants also reported a lack of familiarity with the data extract, including the file structure, variable names, or how the variables were constructed.

4. Understanding nFORM calculations

nFORM performs numerous calculations for the grantees' quarterly progress reports and includes a data visualization tool, known as the query tool. However, participants often did not understand how nFORM calculated the results. Participants reported finding discrepancies in quarterly reports, for example, compared to the information in another system or their own methods of tracking. Participants across the focus groups also discussed the challenge of getting feedback from an FPS or TA provider on certain metrics (for example, the number of referrals that have not been responded to) but being unable to replicate the finding to investigate further. This is due, in part, to the fact that some grantees are using multiple data systems or might be using different analytic assumptions (such as time periods included in an analysis or computation); resulting in discrepancies when grantee staff double-checked a particular finding or issue. For example, help desk data showed grantee staff often did not realize that quarterly report calculations included participation data only from workshops that ended within the reporting period. Much of the subsequent TA focused on helping grantees identify exactly which clients the quarterly reports included and how to track numbers using other reports in nFORM.

5. Prioritizing analyses

Participants across this report's data collection activities frequently said they thought their program collected substantial amounts of data, resulting in a long list of data management and analysis tasks but had no system to prioritize the tasks. Participants often referred to this as data overload—having a wealth of data but being overwhelmed by the volume and unsure of what to use and when. For example, some focus group participants expressed difficulty in prioritizing which data sources (local evaluation surveys, entrance and exits surveys, or service contact data) and specific data points or variables within those sources to analyze for CQI.

Compounding the data overload challenge was staff turnover. For example, focus group participants discussed that it was often the data managers' responsibility to train new staff on data collection procedures and protocols. In sites with high turnover, training and retraining staff left them with less time to concentrate on data analysis tasks.

C. Data usage

Collecting and analyzing data offers limited value if grantees do not have the capacity to use the results and findings in a meaningful way. Building grantees' data capacity includes using the data to monitor program performance, inform program improvement, and share lessons learned with others through internal and external dissemination (Box IV.3). The FaMLE Cross-Site team found many grantees that participated in this report's data collection activities had limited ability to use data in a multifaceted way. Participants focused primarily on performance monitoring but struggled with communicating findings and telling the story of their programs.

Box IV.3. Data capacity framework: Data usage defined

How grantees use or apply the results from the analyses for internal and external purposes. Subcategories include:

- Communications
- Program improvement
- Performance monitoring
- Dissemination

1. Going beyond performance monitoring

Most participants used data to conduct and report on performance monitoring. This enabled them to systematically track how their program performed on key metrics. However, many participants noted that grantees were challenged or less inclined to use their data for more than performance monitoring.. Some participants asserted that a deeper dive was necessary for program management, CQI, sustainability, and evaluation efforts. TA providers and FPSs expressed that some grantees did not fully investigate issues revealed by the data. For example, participants shared that analysis of nFORM data might reveal low attendance, but grantees might not investigate (either through additional analyses or collecting additional data) the underlying causes of that issue. They reported that grantees might only pursue answers to questions ACF asked them to address, and not explore their own questions to improve their program or their community.

2. Telling a story with data

Ideally, grantees are to systematically review and synthesize the data so they can share insights and lessons learned with key stakeholders. Telling the story of a program's implementation and outcomes proved challenging for grantees. Some TA providers and FPSs shared that grantees may not see the opportunity to do so, or that they do not know how to translate the data into a story. For example, some focus group participants expressed challenges integrating findings from each CQI team member into a comprehensive story. FPSs also perceived a similar shortcoming when reviewing the narrative sections of the grantees' annual reports, noting a lack of details or a cohesive account of an issue or success.

D. Culture of data and research

Developing and fostering a culture of data and research, in which inquiry and improvement is valued, encouraged, and understood, is an important component of data capacity (Box IV.4). Encouraging a culture of data and research can then support all other dimensions of data capacity (data collection, analysis, and use). Participants in the data collection activities spoke frequently about issues

Box IV.4. Data capacity framework: Culture of data and research defined

How grantees promote a culture in which they use data and value research. This category mainly includes policies and procedures pertaining to hiring, training, and supervising staff who interact with and use data. This category also covers the grantees' program and organization as whole, focusing on data-driven decision making and partnerships influencing research or data collection. Subcategories include:

- Staff hiring
- Staff training
- Leadership
- Supervision
- Coaching and professional development
- Organizational decision making
- Partners and partnerships

related to the culture of data and research. As a result, the team identified many challenges in this area. Key challenges were (1) developing staff buy-in, (2) building consensus among grantee staff and evaluators, (3) hiring and training a skilled team, and (4) using data and research from outside the program.

1. Developing staff buy-in

For the grantees to successfully collect and use data, they need the cooperation and buy-in of all staff. Many participants reported a program-wide challenge to gain frontline staff's buy-in to the value of data collection and evaluation. With resources and time spread thin, many participants in the focus groups said they deprioritized data management to accommodate other pressing needs. Frontline staff might fail to see the benefits of data collection or think that it interferes with their other responsibilities. For example, some participants reported that frontline staff sensed a tension between establishing rapport with clients and collecting data from them. If staff do not value or prioritize data collection, it can affect data quality. Specifically, if staff do not collect information from clients, do not collect information consistently, or do not convey the value of the information to a client, it can lead to missing data, low response rates, or inaccurate information. FPSs and TA providers observed that grantee leaders who communicated with program staff on the importance of quality data collection for program improvement successfully got buy-in and were in a position to develop high quality evaluations.

2. Building consensus among grantee staff and evaluators

Select grantees identified and partnered with an outside evaluator for their local evaluations. Focus group participants noted that local evaluators and the grantees sometimes struggled to agree on research objectives and methods. For example, a local evaluator might advocate for his or her own research agenda, which might not align with the grantee's or organization's mission or the program services. Conversely, other participants noted that grantee program directors, particularly those new to research, might accept the evaluation plans without fully understanding the ramifications that data collection had on their clients or staff.

This lack of consensus caused two issues. First, some participants spoke about collecting too much data, in part because evaluators and grantees could not agree on which data to prioritize. For example, some participants said they were administering surveys that were too long and included measures that they would not use in analysis or that did not apply to the clients they serve. Some participants shared their realization that they needed to scale back on ambitious research plans. In addition, a lack of shared understanding and/or ineffective communication between evaluators and grantee leaders about the priorities can strain the partnership and lead to disappointment about what can be learned at the end of the evaluation. Several participants noted that this challenge can be exacerbated when the evaluator is in a separate location from the grantee. Some believed that long-distance evaluators might not understand the community context. Focus group participants reported attempting to overcome their distance by holding virtual meetings with their evaluators. However, although the online meetings helped, some participants still found it difficult to build rapport and trust.

3. Hiring a skilled team

The requirements of performance data collection meant that HMRF grantees needed to hire staff who could both implement the program and collect and analyze data. Many participants reported challenges in finding the right staff to improve their data capacity. Specifically, participants mentioned challenges in finding applicants and staff who were well versed in data collection, technology, CQI, and evaluation, but also skilled at delivering services and building rapport with clients. Participants said they could either find staff who valued research and needed less training on data collection (such as graduate students), or staff who could effectively establish rapport with clients (such as program staff from or experienced with the local community). However, they generally could not find staff who excelled across all areas.

4. Training a team

Once staff were hired, grantees need to ensure they are well versed in data collection and research and evaluations. Participants noted several gaps in staff training: data collection methods, CQI, data analysis, and general training on research and evaluation. Some participants discussed the difficulty of training that accounted for the diverse skill set of the grantee staff, from novice to advanced content. For example, some participants wanted nFORM support split into basic and advanced groups. By dividing the content, experienced staff could ask in-depth, complex questions, whereas newer staff could ask questions about basic data collection and nFORM processes. Some participants said they or their organizations needed more support in training and helping their staff during data collection.

A few participants also noted that training gaps could appear because of staff turnover. For example, tickets from the help desk revealed that grantees often reached out for help generating certain reports that another staff member who left the program had been responsible for before.

5. Using research and data from outside the program

HMRF grantee programs should be informed by research. Consequently, grantee staff need to be regular consumers of research from outside their programs. Some participants perceived that few, if any, grantees used outside research during active implementation. When asked about any outside research they used, participants discussed using academic literature and other data sources to write their grant applications and develop or refine their program during the application process. However, few continued this practice after the grant was awarded. TA providers echoed this, noting that grantees could expand their use of outside research and data throughout program implementation.

Program staff often lacked the time or resources necessary to find, review, and incorporate external research to support their programmatic decisions. For example, several focus group participants reported issues accessing relevant literature without having a subscription to a journal or database. In addition, participants said the idea of using research if they were unfamiliar with research terminology could intimidate some program staff. Several participants thought that even those versed in research might not understand methods and analyses in more complex sources.

E. Understanding funder requirements

ACF established policies and requirements to communicate its expectations for performance to all grantees (Box IV.5). The policies and requirements covered program implementation and evaluations. ACF also specified standard approaches to collecting performance measure data, including administering client entrance and exit surveys; and setting enrollment targets. Participants in the data collection activities identified two issues related to these requirements. First, some participants expressed a desire to receive guidance sooner. For example, some grantee staff shared that having earlier guidance on ACF's requirements for completing CQI would have helped them align their ongoing CQI steps with ACF's expectations. Second, a few participants did not fully understand the data collection requirements, particularly those relating to CQI. Based on the analysis of data collected for this report, a few grantees had trouble seeing the differences between CQI and performance monitoring. Consequently, they could not easily interpret the CQI requirements and change their practices to comply with ACF's expectations.

Box IV.5. Data capacity framework: Understanding funder requirements defined

How grantees understand and apply the funding requirements for research and collecting and using data.

F. Integrating TA

Grantees receive support from multiple sources. Each grantee is overseen by an FPS who monitors grant performance and provides guidance (Box IV. 6). In addition, each grantee receives assistance on program implementation, CQI, nFORM, and evaluation from federally contracted TA providers. Together, these groups address the programmatic, data, and evaluation needs of the grantees. Across the focus groups, participants reported difficulty understanding and applying TA from multiple providers. Participants noted that this resulted in the various providers sometimes offering, what grantees perceived as conflicting guidance about data capacity. For example, a grantee might think that an evaluation TA provider's guidance conflicts with guidance from a programmatic TA provider. TA providers themselves said they were sometimes unsure which information about a data capacity topic had been communicated already and to whom. Some participants were confused about the roles each provider played in terms of providing programmatic and evaluation TA. Several participants thought this contributed to their confusion about ACF requirements and guidance.

Box IV.6. Data capacity framework: Integrating TA defined

How grantees understand and integrate the programmatic and evaluation TA related to research and collecting and using data.

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V. Recommendations for Technical Assistance Activities to Improve Data Capacity

The FaMLE Cross-Site team developed a set of recommended TA activities that could be implemented in future cohorts of grantees to address grantees' challenges, build on their interests, and help ACF meet its goals of improving data capacity. These recommended activities are based on findings from the team's analysis of qualitative data discussed in Chapter IV. Specifically, the team developed a list of activities intended to help grantees (1) use data and research to improve programming and, ultimately, outcomes for clients; (2) enhance grantees' ability to communicate and disseminate findings; and (3) foster interest in advancing the field of HMRF.

This section first illustrates how the recommended TA activities align with the data capacity framework and grantees' challenges. Next, there are recommendations for three core elements that motivate and undergird the TA activities. The section closes with details on how the elements of the TA system interact to seamlessly improve grantees' data capacity.

This chapter highlights specific TA activities and Appendix A contains more details on every recommended TA activity organized according to the challenges they address. For each key data capacity challenge, Appendix A includes recommended TA activities, the associated category of the data capacity framework, recommended timing of TA, and the potential outputs and outcomes of the TA approach.

A. Summary of TA activities

The FaMLE Cross-Site team developed recommendations for TA activities to touch on all aspects of the data capacity framework and address the grantees' challenges (Exhibit V.1). Supported by this comprehensive approach, grantees might increase their capability to collect, analyze, and share data about their programs. For example, developing data collection procedures that support survey administration is one of the main data infrastructure challenges facing grantees. As described next, and in Appendix A, the FaMLE Cross-Site team recommends a first step that involves helping the grantees create a comprehensive data collection plan by giving them informative materials and holding webinars, followed by troubleshooting ongoing challenges during meetings of peer learning groups (called peer collaborative meetings) and, if needed, offering one-on-one TA (details on the TA modes are in the upcoming section). If the TA activities succeed, grantees might be more successful in integrating surveys into their programs and raising their response rates.

The scope of the recommended TA activities is comprehensive: up to 14 TA activities per grant year plus one-on-one TA if needed.

The scope of the recommended TA activities is comprehensive. Over the course of the grant years, the recommended TA goal is to develop one written resource and corresponding training webinar per quarter. The recommendations include additional support in the form of quarterly peer collaboratives and sessions at the annual grantee conference. One-on-one (1:1) TA is available throughout the grant years to those needing more support. In total, the study team recommends up to 14 TA activities per grant year (excluding 1:1 TA).

The recommended approach features flexibility to cover new topics and issues that may arise. Although the recommended TA activities are based on the identified challenges, peer collaboratives and grantee conference sessions allow TA content to be tailored to new challenges that emerge through program implementation or TA provision. Additionally, the activities are less specified in terms of materials and webinars in the later years of the grant. This allows for the content to be adapted to the specific needs or growth areas of the next cohort of HMRF grantees. Appendix A describes all TA activities in detail.

Exhibit V.1. Summary of recommended TA activities for addressing grantees' challenges and building data capacity

Data capacity framework category	Challenges	TA activities overview	Long-term TA outcomes
Data infrastructure	• Developing data collection procedures and protocols • Accessing nFORM	• Produce materials, conference sessions, and webinars on how to develop thorough plans for data collection and quality assurance • Use quarterly peer collaboratives to facilitate sharing of ideas to overcome data collection challenges • Use one-on-one TA to troubleshoot persistent or complex challenges	• Easier survey administration • Higher survey response rates • Fewer errors in nFORM data entry, and less missing data
Analytic capabilities	• Analyzing data • Working with multiple data systems • Using nFORM reporting features • Understanding nFORM calculations • Prioritizing analyses	• Produce materials, conference sessions, and webinars on understanding the performance measures and nFORM report calculations • Produce materials and webinars on combining data from multiple sources • Provide materials and webinars on developing and implementing CQI analysis plans • Provide materials and webinars to strengthen foundational and advanced analytic skills • Use peer collaboratives to facilitate sharing of analytic methods and resources • Use one-on-one TA to troubleshoot persistent or complex challenges	• Improved analysis plans • More efficient and higher quality data analysis
Data usage	• Going beyond performance monitoring • Telling a story with data	• Produce materials, conference sessions, and webinars on leveraging data for multiple uses, including CQI and other program activities • Produce materials and webinars on forming a dissemination strategy and conveying information to different audiences • Use peer collaboratives to facilitate sharing of ideas and strategies for dissemination • Use one-on-one TA to troubleshoot persistent or complex challenges	• More participation in CQI • Expanded use of data for CQI and other program activities • Contributions to the evidence base of HMRF • Increased knowledge of HMRF programs within the community

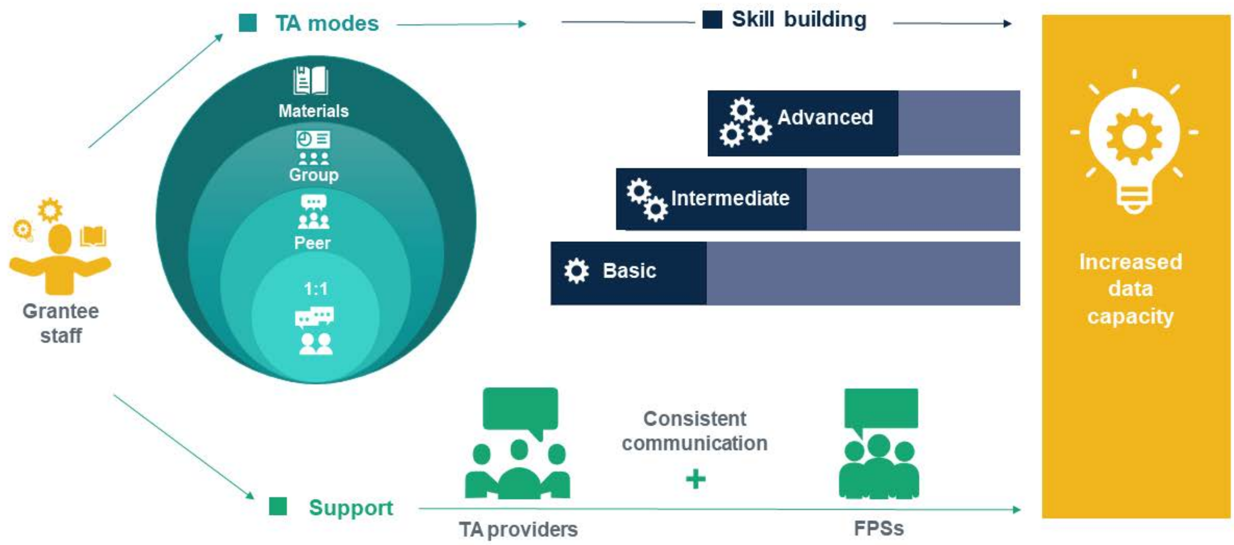
Data capacity framework category	Challenges	TA activities overview	Long-term TA outcomes
Culture of data and research	• Developing staff buy-in • Building consensus among grantee staff and evaluators • Hiring a skilled team • Training a team • Using research from outside the program	• Produce materials on the importance of using evidence and how research and data affect individual staff and clients • Host conference sessions and webinars to discuss the importance of creating a culture that values research and data, and provide tools for encouraging a research- and data-driven culture • Produce materials and webinars on best practices and guidance on training and supporting staff during research and data collection • Use peer collaboratives to facilitate sharing ideas about encouraging a research- and data-driven culture, and best practices for hiring and training staff • Use one-on-one TA to troubleshoot persistent or complex challenges	• More positions filled with appropriate staff • Greater support among grantee staff for collecting and using data • Greater consensus among project leaders and evaluators on research priorities
Understanding funder requirements	Clarity about requirements	Provide early TA on performance measures and ACF's expectations through materials and conference sessions	• Increased awareness of data requirements • Better adherence to requirements
Integrating technical assistance	Communication and coordination between FPSs and TA providers	Embed a process for coordination and communication throughout TA	Shared understanding of grantees' challenges and strategies for improvement

B. Summary of TA elements

The recommended TA activities are based on three core elements. The elements support the mastery of basic skills first, while providing opportunities for growth and delivering content that aligns with the grantees' implementation or research timeline. Specifically, the TA elements provide recommendations for delivery modes, communication between TA providers and FPSs, and skill-building content (Exhibit V.2):

- **Delivery mode.** The TA should offer a range of modes that escalate in intensity. The modes move from materials covering a breadth of topics to ones that allow grantees to deepen their understanding and application of the content. The various modes also give the TA providers multiple opportunities to delve deeper into the specific circumstances of the grantees and the challenges their staff members face.
- **Coordination process.** The TA activities should be supported by frequent communication and coordination between FPSs and TA providers to enable them to readily identify grantees' needs, match grantees to the most appropriate level of support, and share knowledge of guidance and best practices from ACF and TA providers.
- **Skill-building content**. Content should be sequenced to progress from foundational to more advanced. This sequencing also accommodates variation in grantee staff's skill levels by providing TA suitable for all levels, with some content geared toward those who are struggling, and other content meant for those looking to deepen their expertise. Content should also naturally progress through the skills required for (1) planning, (2) data collection, (3) analysis, (4) performance monitoring, (5) CQI, and (6) dissemination and contributing to the evidence base. The TA should ultimately encourage a culture of data and research. This results in front-loading much of the TA in the first years of the grant to support grantees in planning and rolling out their research and data collection. Assisting grantees in thoughtful planning could prevent future issues and enable grantees and their staff to focus more on opportunities for growth and professional development.

Exhibit V.2. Elements guiding recommended TA activities for improving grantees' data capacity



1. TA modes

The study team recommends offering a range of TA modes that escalate in intensity from written materials to group webinars and conference sessions to peer collaborative meetings, and finally to 1:1 assistance. Materials should be designed to be applicable to most grantees and provide broad content related to a TA topic. The corresponding webinars should aim to introduce and apply the content presented in the materials, offering opportunities for grantees to ask questions related to specific circumstances. Peer collaboratives are an opportunity for grantees and TA providers to hear about the successes and challenges encountered by other grantees. One-on-one TA allows the TA provider to interact with grantee staff on a more individualized basis to deeply understand and address the barriers to improving their data capacity.

Multiple modes also increase efficiency by concentrating the most time-consuming 1:1 TA on those with the greatest need. The study team suggests first offering materials to share necessary information and examples to all grantees via fact sheets, templates, FAQs, best practices, flow charts, manuals and other types of written or visual resources. TA providers can then hold webinars and peer collaborative meetings that create a more interactive environment for grantee staff to engage with TA providers and one another. Because 1:1 assistance can be time- and resource-intensive, and given the large number of grantees, the study team suggests proceeding to this type of TA only after a grantee, TA provider, or FPS indicates it has participated in other modes and attempted the recommended activities.

Offering various TA modes also accommodates grantee staff's varying skills and experience. All grantees that participated in data collection experienced at least a few challenges, including limited understanding of data expectations, nFORM, data collection, analysis, and research. Even those with strong data skills and past performance are likely to benefit from support and guidance. Written materials and webinars might be the fastest (and therefore easiest) form of support for them to access. Fewer grantees might wish to engage with peers, and even fewer might need intensive support from a 1:1 TA liaison (see Exhibit V.3) for illustrative grantee profiles). For example:

Offering various TA modes also accommodates grantee staff's varying skills and experiences.

- For some returning grantees that exhibited strong past data capacity and expertise in research and evaluation, written materials might be enough to ensure they understand and are meeting ACF requirements for data collection and monitoring. These grantees might seek new topics to increase their data capacity by, for example, attending webinars or peer collaboratives to learn more advanced topics.
- For other returning grantees seeking to build their expertise, written materials, webinars, and some peer support might be enough to meet their needs. They might mostly need information about the grant's data requirements and some light-touch training or idea sharing through the webinars and peer collaboratives. However, they might not require 1:1 assistance if they have worked through key challenges in past grants.
- Still others, especially new grantees with less research experience, might need more support to understand or meet performance expectations or use data in a meaningful way after accessing the materials, webinars, and peer collaborative meetings. Those grantees could benefit from 1:1 support.

Exhibit V.3. Example grantee TA profiles

New grantee with little data capacity

Experience

- New to grant requirements
- Little data collection or research experience
- Little buy-in among staff regarding research and data
- No formal CQI experience

TA goals

- Understand grant requirements
- Improve basic data collection skills
- Improve CQI processes and data communication
- Meet grant requirements

TA use

- Uses all written materials
- Needs webinars to apply materials
- Attends peer collaboratives but has difficulty applying tips
- Needs 1:1 TA for specific challenges

Returning grantee with moderate data capacity

Experience

- Familiar with most grant requirements
- Faced some data collection or research challenges
- Needed TA to support CQI
- First time conducting a local evaluation
- Mainly returning staff, some are new

TA goals

- Understand grant requirements
- Master basic skills, use skills to resolve challenges
- Proficient in CQI, clear data communications
- Disseminate findings to community
- Meet or exceed grant requirements

TA use

- Uses select written materials
- Needs select webinars to apply materials
- Presents at peer collaboratives, attends others for tips
- May need 1:1 TA for specific challenges

Returning grantee with advanced data capacity

Experience

- Understood grant requirements
- Had few data collection or research challenges
- Proficient in CQI
- Conducted a local evaluation, now using a rigorous design
- Mainly returning staff, some are new

TA goals

- Improve advanced skills
- Use data in new ways to improve program and communications
- Disseminate findings, contribute to evidence-base
- Exceed grant requirements

TA use

- Uses select written materials
- Mainly attends webinars on advanced skills
- Presents at peer collaboratives, attends others for tips
- May need light 1:1 TA for specific challenges

Flexibility in timing the TA is also likely to be important to grantees. To embed this flexibility in TA, all webinar recordings and materials should be available in an online resource library for grantee staff, FPSs, and TA providers to access any time (for example, through the nFORM help page). This would enable grantees to access resources based on their needs and schedules. A resource library would also support bringing staff on board (as staff turnover is inevitable) and retraining them, helping to support the mastery of foundational and other skills even for staff who cannot participate in TA in real time. This would enable staff who join later in the grant cycle to master the basic skills and participate in more advanced TA activities if they wish to.

Next, each TA modality is described in detail with examples of how to deliver it in practice.

2. Materials

The recommended approach includes four TA modes: (1) materials, (2) webinars and HMRF conferences, (3) peer collaboratives, and (4) 1:1 TA.

Written materials can convey foundational information quickly and efficiently to all grantees and their staff. Several types of written materials would potentially be useful to grantees, including FAQs, manuals, templates, flow charts, and tip sheets. For example, a tip sheet could explain how to calculate performance measures. Templates for data collection and analysis plans would provide guidance for deciding on and documenting (1) which data to use for performance monitoring and evaluation; (2) how to collect the data; (3) who will be responsible for each data collection, storage, and analysis step, (4) the timing of collection and analysis, and (5) and how to analyze the data.

3. Webinars and HMRF conferences

Webinars and other group-based TA can help convey complex information, but also allow for questions and other interactions. The team's proposed plan recommends two broad types of these activities: (1) interactive sessions at the grantee HMRF entrance conference and annual conferences that encourage buy-in for collecting and using data and coordinating among grantee staff, and (2) training webinars that build skills by explaining and encouraging the use of TA materials.

To capitalize on in-person meetings, the study team recommends sessions for all grantees at the entrance conference. The team recommends two sessions to set clear expectations for collecting data, monitoring performance, establishing the importance of data, and promoting a culture that values research and data among grantee staff. The TA provider can craft content for subsequent annual conferences based on questions, challenges, or interests encountered through the other TA activities throughout the year. The recommended approach includes up to two sessions related to data capacity at the annual conferences.

In addition, the recommended written materials are all simultaneously introduced with accompanying training webinars. Grantees can easily miss materials sent via email, have questions on the content, or underestimate how the materials can support them, diminishing their use. A webinar to explain the purpose of the materials, provide real-world examples of how the materials will support their efforts, and answer questions from grantees might encourage uptake.

4. Peer collaboratives

Across this report's data collection efforts, the FaMLE Cross-Site team heard that participants would like more opportunities to learn from their peers. Specifically, participants in the data collection activities believed that peers can help each other in at least two ways: first, by exchanging tips for overcoming challenges (such as data collection best practices with a hard-to-reach population), and second, through mutual support and encouragement. For instance, during the data collection session at the annual conference, grantees exchanged tips for overcoming challenges, and many were relieved and encouraged to learn they were not the only ones facing a particular issue or situation.

The TA recommendations include a plan for quarterly peer collaboratives that meet in the months following the release of materials and webinars. This would give grantee staff a chance to use the materials, apply the skills, and come to the meetings with questions or guidance for their peers. Peers could also discuss the more granular, circumstance-specific challenges not as easily addressed in materials and webinars designed for a broader set of grantee staff. For instance, a collaborative on data collection strategies could delve more deeply into issues for grantees serving rural communities where staff and clients are spread out, and Internet service is less reliable.

Peer collaboratives would meet in the months following the release of materials and webinars. This would give grantee staff the opportunity to apply the skills and use the materials and discuss more nuanced or circumstance-specific challenges.

Grantees would self-select into the collaboratives and drive the content and discussion, but FPSs or TA providers could urge them to attend and contribute. Meetings could showcase grantees who have been successful in a particular area by inviting them to share a brief, informal presentation on their success. A facilitated discussion about other grantees' current challenges related to the topic, and peers' guidance for addressing them, could follow the presentation.

The TA provider's role in the collaboratives would be logistical: identifying content and successful grantees, coordinating the logistics, asking grantees to present, enabling topic selection, and providing the virtual gathering space. Moderating peer meetings will also be essential. The TA provider will correct any wrong or misleading information about ACF requirements or best practices, for example.

Each peer collaborative would need to be broken into subgroups to keep the discussions manageable. The subgroups category could differ by topic. For example, the TA provider could create a peer collaborative for discussing data collection challenges and solutions, grouping interested staff into those collecting data from adult individuals, couples, youth, and incarcerated parents. However, another peer collaborative on creating a culture of research and data use might only need three groups: HM programs for youth, HM programs for adults, and RF programs.

5. One-on-one TA

For grantees that have attempted to improve their data capacity through the other TA modes but still need support, 1:1 TA may be needed. In a more personalized format, the TA provider can delve deeply into the grantee's challenge(s) and the solutions they have attempted, and co-create and pilot a new solution with grantee staff.

Because 1:1 assistance is the most time-intensive TA mode, ACF and its data capacity TA partner would have to decide how many and which grantees can receive this support based on available resources. The team's recommended TA approach assumes all grantees can access 1:1 TA once, on average, recognizing that some will likely not escalate to this mode, some might need only light-touch support, and others might need even more 1:1 support to bolster foundational or advanced skills. Alternatively, ACF could limit this assistance to the highest-need grantees, such as grantees that have received corrective action plans or consistently do not meet performance targets related to data capacity. An FPS would approve 1:1 TA before offering it to a grantee.

The study team recommends structuring the 1:1 TA as a remote, four- to six-week cycle. A TA liaison, assigned to the grantee, would first gain an in-depth understanding of the grantee's circumstances and challenges, and then work with grantee staff to co-develop and pilot a more tailored approach. Quality improvement or rapid-cycle improvement processes, such as the Learn, Innovate, and Improve (LI^2) framework (Derr et al. 2017), would guide this type of work (Exhibit V.4).

Exhibit V.4. Learn, Innovate, and Improve (LI^2) applied to one-on-one TA

Learn

Liaisons would diagnose the underlying issues, learn why the previous TA strategies were unsuccessful, and engage grantee staff in meaningful discussions to identify root causes or drivers of challenges.

Innovate

Liaisons would engage grantees in co-creating or co-refining a strategy to address the root causes.

Improve

Liaisons would engage select grantee staff to road test the strategy; if successful, they would roll it out to the entire staff and disseminate their experience through a peer collaborative. If the strategy was unsuccessful, the cycle would repeat, with reduced involvement from the TA liaison.

For instance, following the LI^2 model, the liaison would use the Learn stage to understand root causes or drivers of the grantee's data capacity challenge(s). The liaison would assess challenges through interactive activities and conversations with grantee staff and by reviewing quantitative data, such as the grantee's nFORM reports. In the Innovate stage, the liaison and grantee staff would co-create strategies to address the root causes through interactive activities. Finally, in the Improve stage, the liaison would support the grantee in road-testing the most promising strategy with a small group of staff and/or clients. The cycle would close with support and guidance for expanding successful strategies. If the road test is not successful, the cycle would start over. Each phase would last one or two weeks.

6. Communication between FPSs and TA providers

HMRF grantees could potentially receive support from multiple parties. All grantees have an assigned FPS who oversees the grant activities. Future grantee cohorts will likely also have access to TA from a programmatic TA provider; an evaluation TA provider (for grantees doing local evaluations); and a provider for TA on nFORM, performance measures, and data capacity. A separate report (Strong et al. 2020) describes the recommended TA for nFORM and performance measures. TA to be provided by contracts other than the successor to FaMLE Cross-Site—that is, programmatic and evaluation TA—is not covered in either report.

Communication between the FPSs and TA providers is essential for seamless support of grantees. During focus groups, respondents emphasized that FPSs and TA providers supporting a grantee should have a common understanding of the issues facing the grantee, the capacity-building resources that are available, and the strategies attempted thus far. The implementation of the recommended TA activities will require communication between FPSs and TA providers working with a grantee to identify the grantee's needs and coordinate activities to support the grantee. A shared knowledge of the TA resources (for example, how and when to apply them) will facilitate consistent support for grantees implementing the skills acquired through TA.

Communication should happen regularly and through different modes. To inform the groups about data capacity TA, actions could include the following:

- Disseminating all TA materials to FPSs and other TA providers
- Inviting members of these groups to webinars
- Giving access to all materials and webinars via the nFORM online resource library so FPSs and other TA providers can refresh themselves on the content
- Meeting in person at the annual HMRF conferences to review grantees' challenges and the TA solutions and plans for the future; FPSs and TA providers could also collaborate on the content of conference sessions or webinars
- Calls to discuss individual grantees, which could be held at an agreed-upon frequency, such as quarterly; during these phone calls, FPSs could refer a grantee for 1:1 assistance
- Email updates about grantees receiving 1:1 TA on grantees' progress and any additional needs

7. Skill-building content

Content should focus on building foundational skills before more advanced or complex skills. Many challenges participants described during the data collection activities stem from a lack of mastery in foundational data collection, analysis, and research skills. After strengthening foundational skills, the data capacity TA provider can offer opportunities to learn about advanced skills that build data capacity even more. For example, when grantees understand ACF's expectations for performance and research, they can better plan for data collection. Similarly, strengthening analytic abilities to support performance monitoring and CQI could progress as follows: (1) resources on accessing and interpreting the nFORM reports and data; (2) training on basic analytic skills (such as obtaining counts and means) through webinars and peer collaboratives; and (3) training on advanced analysis (such as coding and analyzing qualitative data or more advanced statistical significance testing) through webinars and at annual conferences.

The TA content should also align with the natural progression of the program—from planning after award to disseminating findings. In the recommended approach, TA topics would concentrate first on data infrastructure; then on analytic abilities and using findings to drive performance monitoring and CQI; and finally, on disseminating findings to communities, practitioners, and academics (Exhibit V.5). Additional content in later years can focus on emerging challenges and issues identifies through program implementation and the provision of TA. The following is an example of how this progression might play out over the grant years:

- **Focus on planning and preparation in Year 1.** Provide materials and webinars related to developing data collection plans, understanding performance metrics, hiring and training a skilled team, and promoting a research- and data-driven culture. Peer collaboratives would focus on grantees sharing their plans and how they are developing the culture of research and data throughout their program and staff. One-on-one TA would help selected grantees develop their data collection procedures and protocols and helping them establish their culture of research and data use.
- **Support data collection, program monitoring, and improvement in Year 2.** Provide materials and webinars related to overcoming data collection challenges, using performance data, conducting CQI, and deepening analytic skills. Early collaboratives might first concentrate on promoting a research- and data-driven culture and staff training, then focus on grantees sharing solutions to data collection challenges. One-on-one TA would help selected grantees overcome specific challenges with data collection and develop or implement their CQI and analysis plans.
- **Continued support of data collection, program monitoring, and improvement in Year 3.** Provide more advanced materials and webinars related to conducting CQI and deepening analytic skills. Additional materials and webinars could be developed to focus on emerging data collection challenges. Peer collaboratives would be an opportunity for grantees to share solutions to data collection challenges, analytic methods and resources, and CQI strategies.

One-one-one TA would help selected grantees overcome specific challenges with data collection and develop or implement CQI and analysis plans.

- **Forming a dissemination strategy in Year 4.** Provide materials and webinars related to forming a dissemination plan. Additional materials and webinars could be developed to focus on emerging data collection, CQI, or analytic challenges. Peer collaboratives would be a venue for grantees to disseminate lessons or findings to one another, share ideas for broad dissemination within their communities and the HMRF field, and offer continued support for data collection, CQI, and analysis challenges and solutions. One-on-one TA would focus on helping selected grantees develop their dissemination plans and overcome specific data collection, CQI, and analysis challenges.
- **Conducting final analyses and implementing the dissemination plan in Year 5.** Provide materials and webinars related to conveying information to different audiences and contributing to the evidence base. Peer collaboratives would focus on grantees sharing ideas for dissemination, as well as continued support for data analysis. One-on-one TA would help selected grantees with their final analyses and dissemination activities.

Exhibit V.5. Recommended TA activities by grant year

Grant year	Primary TA focus	TA activities		
		Materials	Webinars or conference sessions	Peer collaborative
Year 1	• Developing a culture of research and data use • Planning for data collection	• Document on benefits of research and using data for each staff role • Data collection protocol or template • nFORM data dictionary • Annotated performance measure reports	• Two grantee entrance conference presentations • Webinar to introduce document on benefits of research and using data • Webinar on using data collection template • Webinar on nFORM data dictionary • Webinar on annotated reports	• Strategies for planning to collect data • Strategies for promoting a data- and research-driven culture • Two additional collaboratives based on needs
Year 2	• Beginning data collection • Program monitoring and improvement	• Best practices for data collection and training • Data collection quality assurance protocol template • Introduction to and best practices for CQI • CQI plan template	• Webinar on data collection best practices and training • Webinar to introduce quality assurance template • Webinar to introduce CQI and best practices • Webinar on using the CQI template • Up to two grantee conference sessions	• Strategies for training and promoting a data- and research-driven culture • Data collection strategies • CQI strategies • One additional collaborative based on needs
Year 3	• Program improvement • Developing analytic skills	• Written resource on data collection and analysis tips for CQI • Instructional documents to begin building grantees' analytic skills • Up to two additional materials on data collection challenges, CQI, or analysis based on needs	• Webinar to introduce written resource on data collection and analysis tips for CQI • Webinar to introduce analysis template • Webinar to introduce analytic instructional document • Up to two additional webinars based on new materials • Up to two grantee conference sessions	• Data collection strategies • CQI strategies • Analysis strategies • One additional collaborative based on needs

Grant year	Primary TA focus	TA activities		
		Materials	Webinars or conference sessions	Peer collaborative
Year 4	• Developing analytic skills • Planning for dissemination	• Dissemination plan template • Up to three additional materials on data collection challenges, CQI, or analysis based on needs	• Webinar introducing the dissemination plan template • Up to three additional webinars based on materials • Up to two grantee conference sessions	• Data collection strategies • CQI strategies • Analysis strategies • Dissemination strategies
Year 5	• Dissemination	• Best practices and options for dissemination • Up to three additional materials on data collection challenges, CQI, analysis, or dissemination based on needs	• Webinar introducing the best practices and options for dissemination • Up to three additional webinars based on materials • Up to two grantee conference sessions	• Analysis strategies • Dissemination strategies • Two additional collaboratives based on needs

Note: The TA approach builds on and refines many of the existing materials created by the FaMLE Cross-Site team for the 2015 HMRF grantee cohort where appropriate.

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Appendix A

TA activities

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This Appendix provides a detailed list of recommended technical assistance (TA) activities. It presents the activities as a set based on an aspect of data capacity to improve. For each set, the section provides (1) the category of the data capacity framework to improve, (2) the challenges the activities address, (3) a description of the approach with the suggested timing of the activities, and (4) the potential outcomes to measure the success of the TA approach. Following these elements, a table provide more information on that proposed activities, broken out by TA mode. The table describes each solution, the potential audience, cost in terms of labor hours, and potential outputs. The table presents activities in chronological order.

TA for developing a culture of data and research

Framework category: Culture of data and research, data infrastructure

Challenge: Cultivating buy-in from staff on the importance of research and making data-driven decisions

Description: Beginning with the grantee entrance conference, TA providers will host a presentation to train and engage program leaders on effective leadership practices to promote the value of research and data. Following the entrance conference, programs will receive a written resource and attend an associated webinar on how each program role can use and benefit from data. Peer collaborative opportunities will be available for grantees to discuss best practices for building a research- and data-driven culture. Peer collaboratives can also function as means for disseminating outside research to the grantees. Table A.1 provides details on these activities.

Outcome(s):

- Most grantee staff report seeing the value in data and research to family assistance program specialists (FPSs) or TA providers.
- Most grantee staff report using research from outside their program and making data-driven decisions to FPSs or TA providers.
- Most program leaders report engaging in leadership practices that encourage valuing data and research to FPSs or TA providers.

Table A.1. Summary of TA activities for developing a culture of data and research

TA strategy	Grant year	Description	Audience	Output
Written document on benefits of using data for each staff role	1	• An introduction to the importance of using evidence and the benefits to the program and community • Guidance on how research and data affect individual staff and clients	• All grantee staff	• Number of downloads
Grantee entrance conference presentation on the value of data	1	• Begin with an interactive activity to uncover implicit and explicit attitudes toward research and evaluation from the multiple perspectives • Discuss the importance of creating a culture of valuing research and data • Provide best practices for encouraging a research- and data-driven culture through a high-level overview of best practices document	• Program directors	• Percentage of grantees represented at the presentation
Webinar to introduce benefits document	1	• Discuss the importance of collecting high quality evidence and using data to drive program improvements • Walk through the document on benefits of using data for each staff role and provide examples of how to distribute and discuss it with staff • Questions and answers	• Program director • Program supervisors and managers	• Percentage of grantees represented at webinar
Peer collaboratives on strategies for fostering a research- and data-driven culture	1–2	• Grantees discuss how they cultivated a research- or data-driven culture • Grantees discuss strategies to overcome staff apprehensions or concerns regarding collecting or using data • Share outside research that they have used for program or research design, program improvement, data collection, and so on	• Program director • Program supervisors and managers	• Percentage of grantees represented at collaboratives

TA for data collection planning

Framework category: Data infrastructure, understanding funder requirements

Challenge: Developing data collection plans and procedures and integrating data collection requirements into program services

Description: At the entrance conference, TA providers will deliver a presentation that introduces grant requirements for data collection and provide strategies for integrating data collection into program services. In the first grant year, following the entrance conference, grantees will receive a data collection plan (DCP) template, introduced via a webinar, to guide them through developing data collection plans and procedures. After the introductory webinar, grantees will participate in peer collaboratives to discuss the process of developing plans and share strategies to address anticipated data collection challenges. Table A.2 provides details on these activities.

Outcome(s):

- Percentage of grantees that complete a DCP
- Qualitative evaluations of DCPs by FPSs and TA providers

Table A.2. Summary of TA activities for data collection planning

TA strategy	Grant year	Description	Audience	Output
DCP template	1	• Area for grantees to detail plans for collecting different types of data (for example, required surveys and supplemental qualitative data) • Details about staff roles and responsibilities, to encourage grantees to establish who does what, when, where, and how often • Tips for developing efficient data collection procedures	• Program director • Data manager	• Number of downloads
Grantee entrance conference presentation	1	• Describe expectations about grant requirements for data collection and data management • Briefly introduce DCP template	• Program director • Data manager	• Percentage of grantees represented at presentation
Webinar to introduce DCP template	1	• Explain purpose of DCP • Walk through template section by section with examples • Questions and answers	• Program director • Data manager	• Percentage of grantees represented at webinar
Peer collaboratives to discuss data collection plan strategies and anticipated challenges	1	• Grantees share about the process of developing DCPs • Grantees present main challenges they anticipate and strategies to address them	• Data manager	• Percentage of grantees represented at collaboratives

TA for understanding performance measures

Framework topics: Analytic capabilities and understanding funder requirements

Challenge: Interpreting various reports and metrics available through the Information, Family Outcomes, Reporting, and Management system (nFORM)

Description: In the first grant year, grantees will have access to annotated reports explaining performance measure calculations and an accompanying webinar that walks through the reports. Grantees will also have access to the nFORM data dictionary and a webinar on using it. Table A.3 provides details on these activities.

Outcome(s):

- Most grantees do not submit help desk tickets in which staff report misconceptions or discrepancies in annual or quarterly reports.
- Most grantees report understanding and correctly interpret performance metrics to FPSs and TA providers.

Table A.3. Summary of TA activities for understanding performance measures

TA strategy	Grant year	Description	Audience	Output
nFORM data dictionary	1	• Building on existing data dictionary, explain structure of tabs and details of variables within the export	• Data manager	• Number of downloads
Annotated reports	1	• Explain purpose of each report with examples of how to use it • Describe calculations of each report component	• Project director • Data manager	• Number of downloads
Webinar to accompany annotated reports	1	• Provide an overview of the annotated reports with examples • Questions and answers	• Program director • Data manager	• Percentage of grantees represented at webinar
Webinar on nFORM data dictionary	1	• Provide high-level explanation of the structure and variables in the data export • Provide examples of questions that can be answered by analyzing data export • Introduce and walk through the instructional documents • Questions and answers	• Data manager	• Percentage of grantees represented at webinar

TA for data collection training, implementation, and monitoring

Framework topics: Data infrastructure, culture of data and research

Challenge: Collecting and entering reliable and accurate data

Description: In the second grant year, grantees will receive materials to help them prepare a quality assurance (QA) plan and troubleshoot data collection challenges that arise during implementation (for example, refusal conversion for survey administration). The TA team will introduce group TA in the form of webinars this grant year to introduce materials and provide detailed suggestions for hiring and training staff on data collection. Grantees can participate in peer collaboratives throughout the grant years to discuss staff training and data collection challenges, and strategies for internal QA. Table A.4 provides more details on these activities.

Outcome(s):

- Most grantees identified by TA providers as having minimal missing data or data entry errors in nFORM.
- Most grantees report conducting regular QA to FPSs and TA providers,
- Responses to the annual program operations surveys indicate staff are comfortable collecting data

Table A.4. Summary of TA activities for data collection training, implementation, and monitoring

TA strategy	Grant year	Description	Audience	Output
Written document on best practices for data collection and training	2	• Importance of reliable and accurate data collection • Common challenges and solutions • Tips for obtaining clients' buy-in and refusal conversion to encourage participation in data collection	• All grantee staff	• Number of downloads
Data collection QA protocol template	2	• Instructions for completing initial data collection QA plan and updating it through grant cycle • Area for grantees to detail QA procedures and staff QA assignments	• Data manager	• Number of downloads
Webinar on data collection best practices and training	2	• Outline qualifications and training required for data collection and data use for various staff roles • Training on management and leadership practices on how to match staff skills to program and data collection roles • Guidance on how to best support all staff in their roles • Recommendations on how to address challenges related to staff skills • Questions and answers	• Program director • Data manager	• Percentage of grantees represented at webinar

TA strategy	Grant year	Description	Audience	Output
Webinar on using QA protocol template	2	• Recap grant-required data collection components • Introduce best practices document and provide tips for distributing and discussing it with staff • Explain importance of QA and walk through QA plan • Questions and answers	• Program director • Data manager	• Percentage of grantees represented at webinar
Peer collaboratives on data collection	2–4	• Grantees share successes and challenges in training staff or supervision for data collection • Grantees share success and challenges related to data collection and QA	• Data manager	• Percentage of grantees represented at collaboratives

TA for developing and implementing CQI plans

Framework topics: Data usage and analytic capabilities

Challenge: Preparing for and implementing high-quality continuous quality improvement (CQI) plans

Description: A presentation during a grantee conference in Year 2 will introduce the Administration for Children and Families' requirements and expectations for conducting CQI during the entire grant period. Afterwards, several written resources, including a frequently asked questions and best practices document will be provided along with a CQI plan template to help grantees develop a comprehensive CQI plan. The TA team will introduce group TA in the form of a series of webinars during that time to provide detailed guidance on how to develop, implement, and monitor CQI efforts. Grantees will also have the opportunity to participate in peer collaboratives beginning in the third grant year to highlight grantees that have used exemplary CQI plans and discuss challenges, solutions, and adaptations to implementation. Table A.5 provides details on these activities.

Outcome(s):

- Most grantees receive initial approval of CQI plans by FPSs and TA providers.
- Most grantees report engaging in CQI activities to FPSs or TA providers.
- Most grantees report fidelity to CQI plans to FPSs or TA providers.

Table A.5. Summary of TA activities for developing and implementing CQI plans

TA strategy	Grant year	Description	Audience	Output
Written resource on introduction to and best practices for CQI	2	• Importance of CQI • Differentiating CQI from performance monitoring • Describe staff roles • Guidance on how to staff and support CQI implementation teams, including gaining staff buy-in	• All grantee staff	• Number of downloads
CQI plan template	2	• Instructions for completing initial CQI plan and updating it through grant cycle • Blank template for grantees to detail procedures and staff responsibilities	• Program director • Grantee staff leading CQI efforts	• Number of downloads
Written resource on data collection and analysis tips for CQI	3	• Types of questions to drive analysis for implementation monitoring and CQI • Common data points and analyses that can help drive CQI • Tips for combining qualitative and quantitative data	• Program director • Grantee staff leading CQI efforts • Data manager	• Number of downloads

TA strategy	Grant year	Description	Audience	Output
Year 2 grantee conference presentation to introduce CQI	2	• Introduce the CQI process • Explain importance of CQI • Detail ACF's requirements and expectations for CQI • Introduce CQI plan template	• Program director •	• Percentage of grantees represented at presentation
Webinar to introduce CQI and best practices	2	• Recap CQI requirements • Explain importance of CQI • Introduce best practices document and provide tips for distributing and discussing it with staff • Questions and answers	• Program director • Grantee staff leading CQI efforts	• Percentage of grantees represented at each webinar
Webinar on using CQI template	2	• Explain purpose of CQI template • Walk through template section by section with examples • Questions and answers	• Program director • Grantee staff leading CQI efforts	• Percentage of grantees represented at each webinar
Webinar on data collection and analysis tips for CQI	3	• Review document • Explain how to implement and monitor a road test • Explain how to assess performance during the road test and identify next steps in the CQI cycle • Questions and answers	• Program director • Grantee staff leading CQI efforts	• Percentage of grantees represented at each webinar
Peer collaborative to discuss strategies for CQI planning and implementation	2–4	• Highlight grantees that have demonstrated successful CQI planning and implementation • Provide opportunities for grantees to discuss CQI experiences, challenges, and solutions	• CQI team members • Program director	• Percentage of grantees represented at collaboratives

TA for data analysis

Framework topics: Analytic capabilities

Challenge: Analyzing data, understanding nFORM calculations, and prioritizing analyses

Description: In the second grant year, grantees will receive an analysis template (applicable to those not conducting local evaluations), introduced via a webinar, to guide them through the voluntary development of analysis plans. The TA contractor will provide grantees with the data dictionary for the nFORM data export to help them identify variables for their analysis. Grantees will also receive materials that introduce them to different possible methods for analysis to begin building their analytic skills in the third grant year. In the third and fourth grant years, TA providers will offer webinars to increase grantees' analytic capacity for using performance measure data. Beginning in the third grant year, grantees can participate in peer collaboratives discussing their analytic plans, methods, and resources. Table A.6 provides more details on these activities.

Outcome(s):

- Many grantees submit completed analysis templates to TA providers.
- Many grantees conduct qualitative evaluations of analysis plans by FPSs and TA providers.
- Most grantees that complete analysis plans adhere to plans and modify accordingly based on challenges, as monitored by FPSs and TA providers.
- Most grantees report understanding the nFORM data export to FPSs and TA providers.

Table A.6. Summary of TA activities for data analysis

TA strategy	Grant year	Description	Audience	Output
Instructional document to begin building grantees' analytic skills	3	• Basic instructions on running descriptive statistics in Microsoft Excel • List of additional software grantees could use for analysis, and pros and cons of each • List of free or reduced-price resources for training on software or analysis	• Data manager	• Number of downloads
Webinar on instructional document	3	• Walk through instructional document • Questions and answers	• Data manager	• Percentage of grantees represented at webinar
Peer collaborative to discuss strategies data analysis	3 - 5	• Grantees share analytic methods and resources and discuss data analysis challenges	• Data manager	• Percentage of grantees represented at collaboratives

TA for dissemination strategies

Framework topics: Data usage

Challenge: Going beyond performance monitoring and telling a story with data

Description: Grantees will receive written documentation on options and best practices for dissemination and developing a dissemination plan beginning in the fourth grant year. A subsequent webinar will present a more detailed walk-through of the importance of disseminating program results and ways to tailor communication depending on the audience. Beginning in the same grant year, peer collaboratives will enable grantees to discuss their experiences in sharing their stories with the public and innovative ideas they have used to show the value of their programs. Table A.7 provides details on these activities.

Outcome(s):

- Annual reports indicate the percentage of reported presentations, reports, and other content developed for outside stakeholders.
- Most grantees report to FPSs and TA providers increased community knowledge of the program of the program results as a result of their dissemination activities.

Table A.7. Summary of TA activities for dissemination strategies

TA strategy	Grant year	Description	Audience	Output
Dissemination plan template	4	• Exercises to help grantees form dissemination goals and map them onto activities • Area for grantee to specify activity, audience, and potential presentation of results	• Program director	• Percentage of grantees that download resource
Document on best practices and options for dissemination	5	• Tips for ways to synthesize data to tell a succinct story • Best modes for dissemination • Recommendations for ways to tailor dissemination based on intended audience • Examples of effective dissemination	• All grantee staff	• Percentage of grantees that download resource
Webinar to introduce dissemination template	4	• Walk through the template with example • Questions and answers	• Program director	• Percentage of grantees represented at webinar
Webinar to introduce best practices for dissemination	5	• Discuss the importance of establishing a program's value within the community • Provide guidance on ways to translate data into a user-friendly story • Provide examples of innovative ways programs have disseminated information externally • Questions and answers	• Program director	• Percentage of grantees represented at webinar

TA strategy	Grant year	Description	Audience	Output
Peer collaborative to discuss strategies for dissemination	4–5	• Grantees share experiences in transforming data into stories about their programs • Grantees present content they created for external stakeholders and obtain feedback	• Program director	• Percentage of grantees represented at collaboratives

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