



# Learning to Adapt: Helping Agape Child & Family Services Use Rapid-Cycle Learning to Drive Equitable Change

**June 2022**

Tosin Shenbanjo, Delara Aharpour, Annie Buonaspina, Brittany Tabora, and Scott Baumgartner

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## Executive Summary

COVID-19 has hit communities of color hard, deepening existing racial inequities and increasing the need for high-quality supports focused on health, education, and employment experiences and outcomes (Brown 2020; Gemelas et al. 2022). With these strains, the pandemic has stretched service delivery organizations thin. It has heightened families' existing needs and given rise to new needs, requiring programs to adapt their supports (Stagner 2020; Willenborg et al. 2021). These complex challenges have increased the need for organizations in different areas—including philanthropy, service delivery, and research—to collaborate and innovate in order to better support programs, their staff members, and the families they serve.

The Refining Virtual Services to Engage 2G families (REVISE 2G) project aimed to meet this charge. Agape Child & Family Services (Agape), the Annie E. Casey Foundation (Casey), and Mathematica partnered to help Agape, a place-based service provider in Memphis, Tennessee, strengthen its two-generation paradigm (2Gen) in the face of COVID-19 and the transition to virtual services. The project focused on Stars, a school-based mentoring initiative for youth, and TeamWorks, a coaching initiative to help adults meet their education and employment goals (Box ES.1). Casey funded and set the vision for the work, and Agape contributed programmatic expertise and oversaw implementation of improvement strategies. Mathematica was the learning partner, contributing expertise in rapid-cycle learning, a strategy for quickly designing and testing program improvements. In addition, a broader work group, including Agape staff members, 2Gen participants, and community partners, supported the project's launch by helping to define opportunity areas.

### A. The approach: Equity-driven improvement

Because of the inequities that the pandemic deepened (Brown 2020; Gemelas et al. 2022), a key charge of REVISE 2G was to use equity principles to guide the design and implementation of change efforts. The project's partners used different approaches to achieve this goal. Mathematica and Agape staff members used the Learn, Innovate, Improve approach (LI<sup>2</sup>) to conduct the project (Figure ES.1). LI<sup>2</sup> is an evidence-driven framework that promotes collaboration to manage change and program improvement (Derr et al. 2017). It involves three phases: learning about opportunity areas and the environment that shapes them (Learn); co-creating solutions (Innovate); and continuously testing the solutions to make them work better and meet identified goals (Improve). We integrated equity principles into each phase of the LI<sup>2</sup> framework. Across all phases, we partnered with affected populations, including 2Gen participants, staff,

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### Box ES.1. Agape Child & Family Services

Agape Child & Family Services is a faith-based organization with a mission of serving children and families experiencing poverty. In 2001, Agape began using a two-generation, place-based model (2Gen) to support families in the Memphis, Tennessee, area. Its 2Gen model includes a range of initiatives designed to help parents, children, and families. About 95 percent of 2Gen participants are people of color. The majority of TeamWorks participants are women in their mid-thirties, and Stars serves an equal rate of male and female students, with an average age of 15.

The REVISE 2G project focused on two initiatives: Stars and TeamWorks.

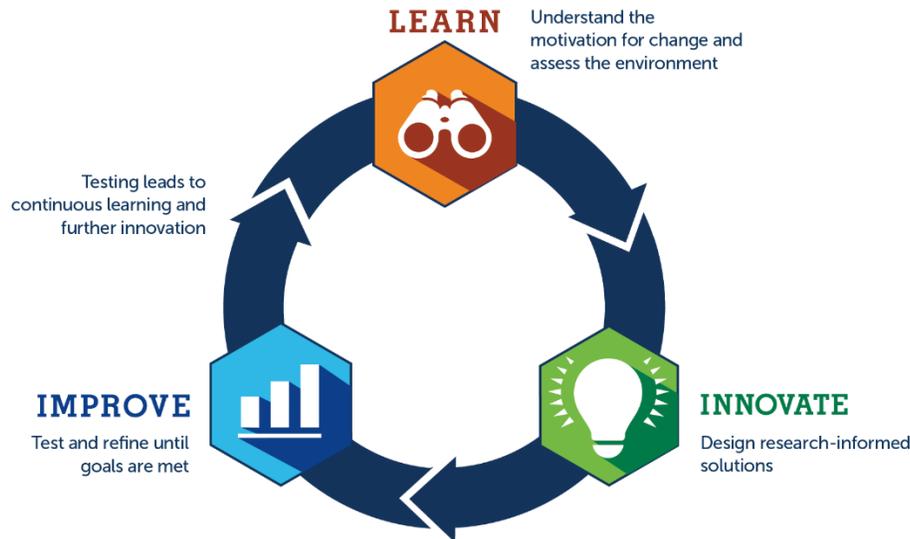
**Stars** is a school-based initiative to help improve student attendance and behavior. The initiative also focuses on increasing parents' participation and interest in students' achievement.

**TeamWorks** focuses on employment and education supports. It connects adults to resources to help them achieve their goals.

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and community partners. In the Learn phase, we identified root causes of program barriers or challenges. In the Innovate phase, we identified solutions to these program opportunities. In the Improve phase, we continuously tested and refined solutions to understand what works, for whom, and under what circumstances.

**Figure ES.1. A framework for change: Learn, Innovate, Improve**



The research team elevated the voices of affected populations through two key strategies: engagement with a work group and two separate implementation teams of four or five staff from each initiative. The work group helped carry out the Learn phase, and the implementation teams helped with the Innovate and Improve phases. Throughout the project, the partners collaborated to understand the initiatives’ opportunity areas, their root causes, potential solutions, and how these solutions might work for different people and in different situations.

REVISE 2G ran from October 2020 to October 2021. Key activities included the following:

- Learning about opportunities for improvement through work group meetings and interviews with staff and participants (November and December 2020)
- Developing program strategies with implementation teams to address identified opportunities (January–March 2021)
- Testing and changing the strategies based on insights from rapid-cycle learning (March–September 2021).

## **B. Collaborating to improve service delivery**

The Stars and TeamWorks initiatives started with a common concern about how COVID-19 made it harder to reach and help families through virtual services. Because the pandemic shifted families’ priorities, many had a lot going on, so staff members could not always engage them like they could before the pandemic. As the Stars and TeamWorks implementation teams dug into this opportunity with the research team, the root causes became clear.

In the early phase of the project, the Stars implementation team identified a need for better communication and coordination among Stars staff. Although this was a need before the pandemic, it became stronger when services moved to virtual platforms. After COVID-19 emerged, Stars Connectors—the frontline staff working with families—needed to change how they reached and supported students. In the past, when student attendance was lagging and students needed motivation, Connectors could find and talk with them directly in school. After virtual learning started, Connectors needed to talk with parents first, before reaching the students. For parents with multiple children, this change meant sometimes receiving contacts from multiple Connectors.

Like Stars, before COVID-19 emerged, TeamWorks Connectors met with participants in person. After the pandemic hit and Connectors needed to rely on virtual meetings, reaching students became harder, and so did having conversations about setting and monitoring education and employment goals. Families had a lot going on at home. Because of virtual learning and school closures, children were at home. Sometimes, families would also need to manage technology or Internet difficulties, or sudden changes in work schedules. Because of these new ways of living and working, and the physical distance between TeamWorks participants and Connectors, Connectors felt that goal-focused conversations had a less personal feel and that they could improve their relationships with participants. However, after the research team interviewed participants, participants’ reports showed they had strong relationships with staff members, but there was room to change the structure of goal-setting conversations. The implementation team decided to focus on how to support virtual goal setting, monitoring, and goal-focused conversations in a way that helped TeamWorks participants feel more engaged and empowered. To address this opportunity, and for Stars to work on its growth area, the initiatives tested and refined the strategies described below.

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### **Common terms**

**Connectors:** Agape’s frontline staff who work directly with families ▲

**Implementation team:** A group of four or five staff from Stars and TeamWorks who helped the research team develop and test strategies and understand how they worked

**LI<sup>2</sup> (Learn, Innovate, Improve):** A specific framework for rapid-cycle learning and managing change and program improvement

**Rapid-cycle learning:** An approach for quickly testing solutions to programmatic challenges and opportunity areas

**Work group:** A group of Stars and TeamWorks staff, participants, and community partners who helped the research team understand the program’s opportunity areas

**2Gen:** An approach to helping families and improving well-being by working with children and parents together

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## **1. Stars: Improving staff members’ coordination and communication**

The research team worked with Stars to pilot case coordination meetings designed to promote communication and collaboration among Stars staff members. These 90-minute meetings served as dedicated spaces for Connectors to share challenges with contacting parents or students, come up with potential solutions for these challenges as a peer group, and streamline contact and services for families who worked with multiple Stars Connectors. After two rounds of testing in April and May 2021, Stars staff members shared that the meetings were structured well, felt useful, promoted fruitful discussion, and left them with specific suggestions for improving services.

The Stars team was interested in exploring how Stars could partner with the Family Connector initiative more, which focuses on wraparound services. Connectors described feeling unable to effectively support

families, whose needs for basic services were heightened during the pandemic. The Stars team believed that improved coordination with Family Connectors could address this challenge and strengthen Agape’s 2Gen model. In August 2021, Stars and Family Connector staff members participated in a brainstorming session to discuss strategies for better coordination. They suggested that sharing data and clearly defining what coordination looks like could help both initiatives coordinate.

## **2. TeamWorks: Testing a structured goal-setting approach**

To address the challenge of facilitating virtual goal-setting meetings, TeamWorks tested an adapted version of Stepping Stones to Success, a goal-setting tool from Mathematica’s evidence-informed [Goal4 It! curriculum](#) (Derr and McCay 2018). Stepping Stones is designed to empower program participants by helping them set motivating, achievable, and time-bound goals. The tool aimed to help Connectors shift their approach to identifying individuals’ needs, moving from assessing program participants to facilitating participant-driven conversations about goals and needs. Connectors tested the adapted Stepping Stones tool in April and May 2021 and reported that it helped participants break down high-level goals and name steps that participants needed to take to achieve those goals. Participants reported that Stepping Stones helped them take charge of goal-focused conversations. However, similar to Stars, TeamWorks Connectors said the tool prompted conversations about needs outside the initiative’s scope, showing room for greater coordination with other 2Gen initiatives.

TeamWorks tested additional goal setting and monitoring tools in July and August 2021 to support more structured use of Stepping Stones, including structured agendas for goal-setting conversations, a template for goal planning, and a worksheet to identify barriers to meeting goals and relevant strategies. Connectors shared that these tools enhanced goal setting and highlighted opportunities for greater coordination in 2Gen.

## **C. Lessons learned: Using evidence to support equitable change and strengthen two-generation initiatives**

Our work with Stars and TeamWorks revealed opportunities for Agape and two-generation partners to use equity-based principles to lead rapid-cycle learning and strengthen two-generation approaches. These principles include working to understand root causes of program challenges or opportunities that affected populations face; partnering with affected populations to understand root causes, develop solutions, and guide how solutions are tested; and adapting or tailoring solutions in order to meet the unique needs of affected populations and understand what works, for whom, and in what contexts.

### **1. Using rapid-cycle learning to promote equitable change**

- **Emerging opportunity areas can reflect organizational challenges that always existed.** For many organizations, the pandemic was a push to resolve or improve processes that were not working. Through our partnership with Agape, we learned that the identified growth areas—including improved coordination and assessment of families’ needs—reflected challenges that existed before the pandemic started. For example, before COVID-19, inconsistent coordination between Stars Connectors and staff from other 2Gen initiatives might have limited the change or progress staff could have helped families make. The pandemic showed that coordination and collaboration were essential because of families’ heightened needs.
- **Engaging 2Gen staff and participants can reveal root causes and potential strategies to address them.** Involving frontline staff and participants in program change can provide perspectives and

expertise from those closest to the work. REVISE 2G's work group included Stars and TeamWorks staff members, participants, and community partners, who helped identify program opportunities at the beginning of the project. The research team then worked with dedicated implementation teams of staff to test and refine strategies for these growth areas. Gaining insights from frontline staff and participants was helpful for pushing past initial reactions about how to address program opportunities. For example, TeamWorks staff initially wanted to focus on building and sustaining strong relationships and trust in a virtual space. However, interviews with participants showed that they already felt supported during the pandemic. One participant said that targeted goal setting helped her stay engaged and motivated in her work with her Connector. This comment led staff to share that goal setting had become more challenging virtually, so the team shifted its focus to improve goal-focused conversations.

- **On-the-ground champions are essential to the success of rapid-cycle learning.** Program staff need to believe that change is meaningful and important for them and the families they support, and they need to be clear about how change is happening. Engaging them and lifting up their voices is one strategy to achieve this, but they should also play an active role managing, leading, and monitoring change. The partnership with the implementation teams helped staff move day-to-day tasks forward and share critical insights about how testing and change were going on the ground. These on-the-ground champions made sure that rapid-cycle learning happened smoothly, was grounded in expertise about 2Gen, and continued regardless of staff members' competing priorities and turnover.

## 2. Strengthening two-generation approaches to meet families' needs

- **Rapid-cycle learning is an inclusive method for supporting two-generation change efforts.** Rapid-cycle learning allows programs to test change strategies in a low-burden, small-scale way, and it emphasizes co-creating strategies with key partners, including program staff and participants. However, organizations like Agape should be mindful of managing potential tensions between staff members' limited bandwidth and meaningful levels of co-creation. Through REVISE 2G, when tailoring and refining the Stepping Stones tool, the research team primarily engaged the TeamWorks implementation team in order to avoid burdening other staff. Although they had a lot going on, some Connectors reported wanting to be more involved in the research processes. When leading their own change efforts, organizations should plan for staff members' collaboration, an approach that can help manage their workloads.
- **Enhancing coordination across two-generation initiatives can help meet families' needs.** Coordination across programs and departments requires intentional planning and ongoing monitoring. For initiatives that support children, adults, and whole families, such coordination is important for making sure staff members streamline services while meeting participants' needs. For example, an organization like Agape can consider promoting coordination by (1) testing tools and strategies, such as Stepping Stones, in other two-generation initiatives; (2) considering how to share data across initiatives and strengthen data on children, parents, and families collected within initiatives; and (3) working with partners to brainstorm and test rapid-cycle learning strategies that can enhance the two-generation approach.

### D. Next steps for the partnership and the field

The partnership among Agape, Casey, and Mathematica is continuing with capacity building focused on rapid-cycle learning and two-generation program improvements that are equitable. As Agape continues its

long-standing relationship with the Tennessee Department of Human Services to advance 2Gen and coordination with Memphis partners, upcoming dissemination and technical assistance will strengthen staff members' capacity to be learning and thought partners to fellow human services agencies and lead equitable change without external support. Staff will be able to move beyond the research-practice partnership that drove rapid-cycle learning in REVISE 2G, using tools they gain to independently design, implement, and refine their own learning cycles. For other two-generation organizations and philanthropic and research partners, dissemination will provide key lessons, considerations, and strategies for rapid-cycle learning that uplifts partnerships and equity principles.

## I. Introduction

COVID-19 has disproportionately affected communities of color, deepening existing racial inequities and increasing the need for high-quality supports focused on health, education, and employment experiences and outcomes (Brown 2020; Gemelas et al. 2022). With these strains, the pandemic has stretched service delivery organizations thin. It has heightened families' existing needs and given rise to new needs, requiring programs to adapt their supports (Stagner 2020; Willenborg et al. 2021). These complex challenges have expanded the need for organizations in various arenas—including research, service delivery, and philanthropy—to partner and innovate in order to better support programs, their staff members, and the families they serve.

The Refining Virtual Services to Engage 2G families (REVISE 2G) project aimed to meet this charge. Agape Child & Family Services (Agape; Box I.2), the Annie E. Casey Foundation (Casey), and Mathematica partnered to help Agape, a place-based service provider in Memphis, Tennessee, strengthen its two-generation paradigm (2Gen) in the face of COVID-19 and the transition to virtual services. Casey funded and set the vision for the work, and Agape contributed programmatic expertise and oversaw implementation of improvement strategies. Mathematica was the learning partner, contributing expertise in rapid-cycle learning, a strategy for quickly designing and testing program improvements. In addition, a broader work group, including Agape staff members, participants, and community partners, supported the project's launch by helping to define opportunity areas.

REVISE 2G built on an implementation study that Mathematica conducted for Agape from September 2019 through June 2020 (Shenbanjo et al. 2020). The study documented Agape's 2Gen model and identified the factors that influenced how staff implemented them. Through the study, one recommendation for Agape was to use equity-focused approaches to enhance 2Gen initiatives and services. REVISE 2G was an opportunity to meet this goal, elevating staff members, community partners, and participants as shared decision makers and experts in making change. Mathematica worked with these partners to co-develop three sets of research questions to guide the REVISE 2G project (Appendix A). The research questions focused on two of Agape's 2Gen initiatives: Stars, which serves youth, and TeamWorks, which serves adults (Box I.1). Each set of research questions met the following goals:

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### Box I.1. The Stars and TeamWorks initiatives<sup>1</sup>

The Stars initiative serves students in kindergarten through grade 12 across 16 schools in three Memphis neighborhoods. An equal rate of male and female students participate in the initiative, with an average age of 15. The initiative seeks to reduce student absences, behavioral problems, and dropout rates and to increase parents' participation and interest in students' achievement. Thirty-seven staff members<sup>2</sup> currently support 608 Stars students across 17 schools.

The TeamWorks initiative serves adults and provides support and referrals for gaining employment and pursuing high school equivalence, postsecondary education, or both (Shenbanjo et al. 2020). Eleven staff members<sup>3</sup> currently support 122 TeamWorks participants. Most participants are women in their mid-thirties.

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<sup>1</sup> Numbers in this box reflect program data reported in December 2021.

<sup>2</sup> These staff members include 1 director, 3 coordinators, 5 supervisors, and 28 Connectors.

<sup>3</sup> These staff members include 1 administrator, 3 supervisors, and 7 Connectors.

1. Identify opportunities to help Stars and TeamWorks adapt and improve in response to the COVID-19 pandemic
2. Understand the implementation of improvement strategies and refine them through rapid-cycle learning
3. Understand the potential for sustaining specific strategies and equity-focused rapid-cycle learning

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**Box I.2. Agape’s 2Gen and place-based approach to helping families**

Agape started its faith-based 2Gen approach to help Memphis residents experiencing poverty and low incomes. Its 2Gen approach aims to address poverty’s effect on whole families, including children’s academic success and adults’ economic well-being (Duncan and Murnane 2011). Research indicates that programs serving both adults and children might be more powerful than two separate programs serving each group, because staff might be more aware of families’ complex and related needs (Ross et al. 2018). Because these needs are anchored in the context of place, 2Gen uses a place-based approach, connecting and responding to needs and opportunities in three Memphis neighborhoods: Frayser, Hickory Hill, and Whitehaven.

Agape’s 2Gen paradigm includes seven core initiatives that serve individuals and families, with 95 percent of participants identifying as people of color. The initiatives’ areas of focus are school, employment, mental health, domestic violence, faith formation, family strengthening, and basic needs. Families can begin receiving support through any 2Gen initiative and connect to services in multiple initiatives, a practice that reflects Agape’s “no wrong door” policy and “voice and choice” approaches. “Connectors” help families move through initiatives and receive services. These frontline staff directly engage with families by delivering services and connecting families to resources.

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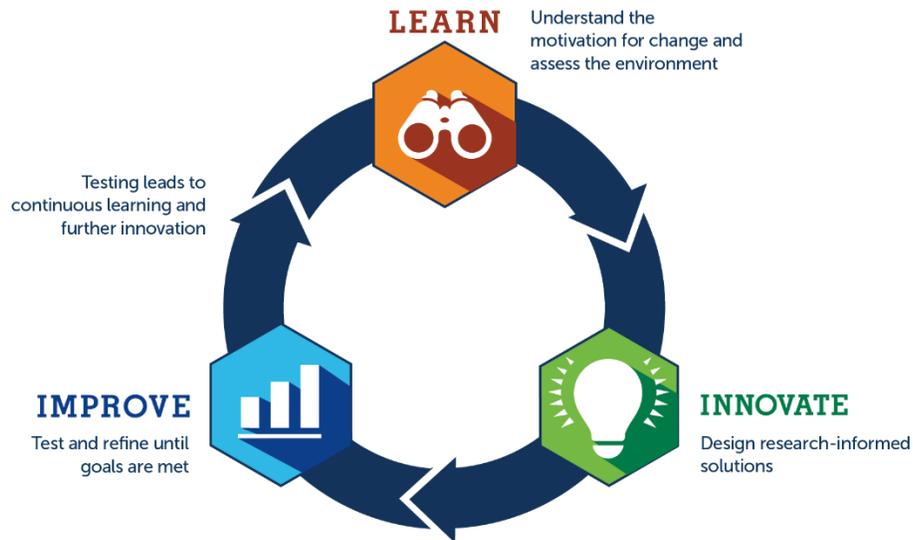
**A. Using equity principles and rapid-cycle learning to conduct REVISE 2G**

2Gen is grounded in two equity-focused frameworks to guide programming and offer family-focused supports. As outlined in Casey’s principles for promoting race equity and inclusion (REI), equity-based approaches can help organizations focus services on families’ own priorities, helping families achieve the progress and growth they want (The Annie E. Casey Foundation 2014). Agape’s voice-and-choice approach allows families to choose the services they participate in, and the no-wrong-door policy allows families to enter 2Gen through any of its initiatives. REVISE 2G sought to reflect Agape’s and Casey’s priorities for advancing equity by grounding program improvement in REI principles.

Because of the inequities that the pandemic deepened, and to reflect Agape’s equitable approach to providing services, a key charge of REVISE 2G was to incorporate equity principles in the design and implementation of change efforts. The project’s partners used different strategies to achieve this goal. Mathematica and Agape staff members used the Learn, Innovate, Improve framework (LI<sup>2</sup>) to guide the work (Derr et al. 2017). LI<sup>2</sup> is a science-based approach to managing change that aligns with REI principles (Figure I.1). It involves three phases: learning about program opportunity areas and the environment that shapes them (Learn); co-creating solutions (Innovate); and testing and refining strategies using rapid-cycle learning methods (Improve). We integrated equity principles into each phase of the LI<sup>2</sup> framework. Across all phases, we partnered with affected populations, including participants, staff, and community partners. In the Learn phase, we identified root causes of program barriers or challenges. In the Innovate phase, we identified solutions to these program opportunities, making sure they reflected people’s needs and environments, were informed by evidence, and were sustainable. In the Improve

phase, we continuously tested and refined solutions to understand what works, for whom, and under what circumstances.

Figure I.1. A framework for change: Learn, Innovate, Improve



REVISE 2G unfolded through two primary activities that elevated the voices of affected populations, including participants, staff, and community partners (Figure I.2):

- **Work group meetings to set the foundation for the work.** In October and November 2020, we conducted three meetings with a work group that included 2Gen staff members, participants, and partners (Box I.3). During the meetings, work group members discussed priorities and opportunity areas for service delivery and created research questions together (Box I.4). After the meetings, the research team conducted an initial round of interviews with staff members and participants to dig in to the root causes of the identified growth areas and the strategies that could potentially address these root causes. Interviewees included staff from the work group and participants who did not attend work group meetings.

**Box I.3. Work group members**

- Staff members from the Stars and TeamWorks initiatives:
  - Leadership staff, including directors and supervisors
  - Frontline staff, including neighborhood coordinators and Connectors
- Participants from the Stars and TeamWorks initiatives
- Partners who work with Stars and TeamWorks, including staff from school districts and employers
- Research team

- **Rapid-cycle learning with Stars and TeamWorks staff and participants to learn about and refine improvement strategies.** Implementation teams of four or five Agape Connectors, supervisors, coordinators, and initiative directors partnered with Mathematica to develop, test, assess, and refine the strategies for Stars and TeamWorks. Stars and TeamWorks each conducted their own

rapid-cycle learning. At the end of each round of testing, the research team (1) gathered feedback from staff and participants about the strategies and suggestions for how to refine them, (2) conducted debriefing meetings to engage the implementation teams in understanding findings and determining next steps, and (3) refined the improvement strategies.

**Figure I.2. Timeline for REVISE 2G project activities**



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**Box I.4. Work group meeting agendas**

Work group meetings focused on establishing a common understanding of REI principles and helping work group partners understand the pandemic-related challenges facing Stars and TeamWorks. The first meeting introduced the project’s goals and focused on co-creating shared values for our partnership. In the second meeting, the work group members and research team explored key challenges and opportunities for Stars and TeamWorks. During the third meeting, we built on the accomplishments of the second meeting by digging in to identified opportunities and brainstorming potential strategies to address these opportunities.

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In this report, we describe the strategies that the Stars and TeamWorks staff members tested and refined throughout the project. In the following sections, we separately describe the work with Stars and TeamWorks. Then, we highlight lessons learned about conducting rapid-cycle learning and lessons about strengthening the implementation of two-generation programming. The final section summarizes next steps for the partnership among Agape, Casey, and Mathematica.

## II. Coordinating Service Delivery to Effectively Support Families in Stars

The goal of rapid-cycle learning in Stars was to help staff members improve virtual service delivery by increasing parents' participation and interest in students' achievement.

### A. The Learn phase: Understanding the context and focus for change

The goal in the first phase of our work was to understand the challenges Stars staff face in virtual service delivery and to identify a priority area to help address those challenges. During the work group meetings, many participants described how the shift to virtual service delivery required a change in Stars' processes for working with students. For example, work group members reported that virtual platforms did not allow Stars Connectors to check on students with low school attendance between classes or through quick conversations with classroom teachers. Instead, when a student was absent from school, Connectors had to contact the student's parent. However, parents' competing priorities and outdated contact information made this difficult. Work group members expressed concern that Connectors might not be able to reduce student absences through these new processes. As a result, the priority area they identified for the work was improving virtual service delivery by increasing student and parent participation and interest.

To learn more about factors that might drive low student and parent engagement, the research team held a series of meetings with the Stars implementation team, which included a Stars Connector, coordinator, and supervisors in all three neighborhoods that Stars serves. We also conducted interviews with Stars Connectors and supervisors after the work group meetings. Through these activities, the implementation team identified three factors that contributed to low engagement in virtual service delivery: (1) the pandemic changed how Stars Connectors worked with parents; (2) the pandemic and Stars' outreach increased the risk of disengagement among both parents and students; and (3) the pandemic changed how Stars Connectors communicated with one another.

### Finding 1: The pandemic changed how Stars Connectors worked with parents

In interviews, staff reported how the pandemic challenged and motivated Stars Connectors to engage families in new ways, and with greater frequency. For example, some Stars Connectors said they went from contacting parents once a month to communicating with parents weekly or even daily. During these parent conversations, Stars Connectors found themselves providing supports that Stars did not typically provide, such as helping parents fill out applications for utility and rent assistance. However, Stars Connectors felt unprepared to support Stars families adequately, and the urgency of the pandemic meant that Connectors lacked the time needed to receive formal training in providing new types of supports. Given the lack of preparation to meet needs beyond the scope of their typical services, Stars Connectors worried that families might disengage from the initiative.

**“When we were in the schools, [we] only communicated [with parents] probably 1 to 2 times per month. Now, [the] need is definitely once a week.”**  
— Stars Connector

### **Finding 2: The pandemic and Stars' outreach increased the risk of disengagement among both parents and students**

Stars Connectors reported that the demands of the pandemic, and the crises it caused, made it difficult for parents to communicate with Stars Connectors. Families' strained capacity to deal with challenges on several fronts, and their changing priorities, posed a special risk for families with multiple children who were served by more than one Stars Connector. Stars Connectors said these families were overwhelmed and exhausted by repeated outreach and communication from several Stars Connectors. Stars Connectors grew concerned, because as school and student programming moved online, parents suddenly became the key to making sure that students logged on to virtual programming. When a parent "logged off" from Stars, the student also did.

**"Parents do not want to be called or texted constantly. If you reach out too much, they will stop answering and engaging."**

**— Stars Connector**

### **Finding 3: The pandemic changed how Stars Connectors communicated with one another**

Stars Connectors described how their main mode of communication with one another before the pandemic was informal and in person. However, with offices and schools closed during the pandemic, Connectors lost the ability to communicate as a team. Stars Connectors reported that they wanted a dedicated space to celebrate their successes and troubleshoot solutions to the challenges they faced when engaging families in Stars.

**"We didn't know parent engagement would be [in] demand [during the pandemic]. We've had to come up with [our] own strategies and collaborate with each other at our school[s]. . . . I asked [my] colleagues [how they] improve[d] parent engagement... [we've] learned by trial and error."**

**— Stars Connector**

The shift to virtual service delivery during the pandemic, coupled with families' heightened needs, parents' new role as the key to students' program access, and the need to connect more with parents and students, created an opportunity for Stars to examine how the initiative engaged families. The implementation team focused on developing a process for Stars' internal communication and coordination of services. Drawing on its expertise in working with families, the implementation team thought that stronger communication and coordination would better prepare Stars Connectors to help families even when in-person services returned and would help strengthen Stars' approach to 2Gen supports.

## **B. The Innovate phase: Co-designing evidence-informed strategies**

To address the priority areas Stars Connectors raised, the implementation and research teams created case coordination meetings together, a strategy aimed at strengthening Stars' internal communication and developing opportunities for peer learning. Peer learning opportunities can lead to the creation of social support systems for teams, improve critical thinking skills, and help teams navigate challenges and identify solutions (Laal and Ghodsi 2012). The implementation team decided to implement neighborhood-specific case coordination meetings for Stars Connectors. The meetings would create dedicated spaces for Stars Connectors to discuss the challenges associated with engaging families or

working with students with low school attendance, troubleshoot solutions to those challenges, and coordinate service delivery for families served by more than one Stars Connector (Box II.1).

To carry out this strategy, the implementation and research teams participated in a series of brainstorming meetings in March 2021 and developed a detailed plan and agenda for scheduling and structuring the case coordination meetings. Brainstorming was guided by questions such as, “What do you want to get out of the meeting?” “How should the meeting be structured?” “Who should attend?” and “How long should the meetings last?”

The implementation team decided that monthly 90-minute meetings would be best to balance staff workloads and competing priorities. Each meeting would include short, informal presentations from no more than three Stars Connectors. During each presentation, the Stars Connectors would summarize a case they were struggling with and discuss potential solutions with their colleagues. In addition to discussing specific cases, the implementation team wanted the meetings to include an opportunity for staff to celebrate successes they experienced over the past month.

In addition to co-designing a strategy, the Innovate phase involves developing learning objectives and planning data collection activities with partners to ensure that they are co-owners of the research. The research and implementation teams decided to collect data in each neighborhood after the first two case coordination meetings. In Box II.2, we present the learning objectives and data collection approach that we developed together.

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### **Box II.1 Stars case coordination meeting structure**

Welcome and purpose (5 min)

Announcements (10 min)

- Upcoming communication with families

Plus/delta activity (15 min)

- Celebrate victories, share parent engagement strategies, and identify areas for support

Discuss specific Stars cases (50 min)

- Identify cases to focus on; Connectors will present and get help with challenges

Closing and action items (5 min)

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### **Box II.2. Objectives and data collection plan for testing case coordination meetings**

#### **Learning objectives**

- Understand Stars team members’ satisfaction with meetings
- Understand any changes in staff self-efficacy in parent engagement
- Understand meeting implementation, including timing of agenda activities and selection of Stars cases for discussion

#### **Data collection activities**

- Survey of meeting participants (including Stars Connectors, supervisors, and coordinators) at the end of the April 2021 and May 2021 meetings
  - Group interviews with Connectors from each neighborhood after the April 2021 meeting
  - Group interview with Stars coordinators after the April 2021 meeting
-

### C. The Improve phase: Collaborating with staff to test and refine the strategy

The case coordination meetings launched in each neighborhood in April 2021, and staff in each neighborhood attended a second set of meetings in May 2021. We conducted two rounds of testing after each meeting. Overall, Stars Connectors, supervisors, and coordinators viewed the case coordination meetings as a success (Figure II.1).

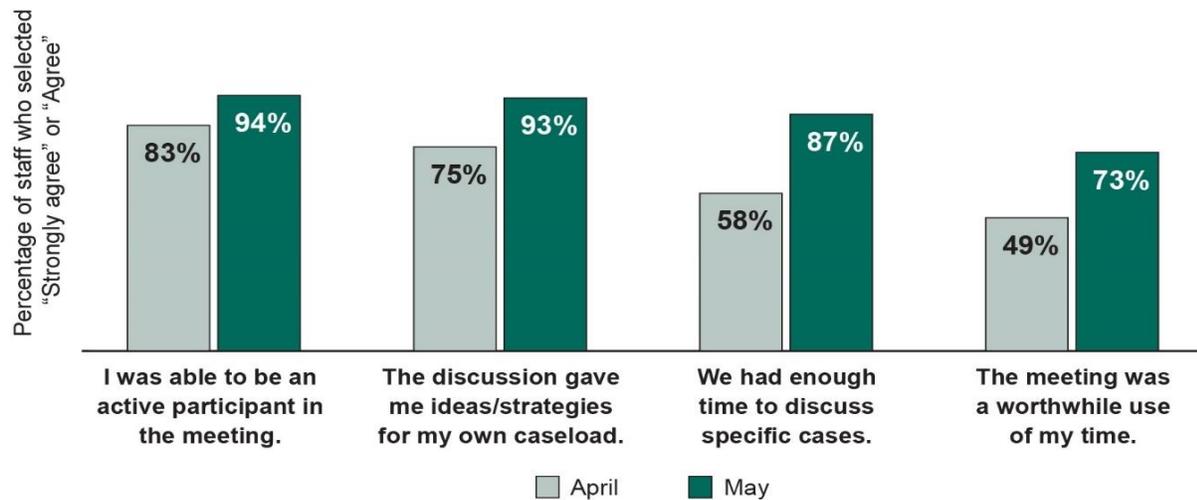
#### 1. First round of testing: April case coordination meeting

During the first round of testing in April, staff reported three ways in which the meeting was helpful:

- Fostered active participation and, as a result, proved more useful than other Agape or Stars meetings
- Involved the right structure, length, and activities
- Facilitated discussions that were helpful for all participants, even those not presenting a case

Although just over half of staff members reported they had enough time to discuss specific cases, they suggested that more time for discussion after each case presentation would be helpful. Based on this feedback, the implementation and research teams worked together to change the timing and flow of the agenda to create more time for discussion.

Figure II.1. Stars Connector survey responses from April and May 2021



Source: Stars Connector survey. Sample includes 12 respondents for April survey and 15 respondents for May survey.

#### 2. Second round of testing: May case coordination meeting

During the second round of testing in May, staff reported two ways in which the meeting was helpful:

- The meeting provided enough time to discuss specific cases.
- The discussion gave them ideas they could use for their own caseloads.

Staff members also noted that it would be helpful if, on occasion, the meetings included staff from other Stars neighborhoods or 2Gen initiatives. For example, staff members recommended that additional staff should join meetings bimonthly or quarterly to discuss cases in which families receive services from

several initiatives. During the interviews, staff commented that, as the pandemic persisted, Stars Connectors continued to function outside their typical roles and responsibilities to meet the needs of Stars families. For example, one Stars Connector said, “Most of the problems presented to [Stars] with our students are out of line with our services. Parents need jobs, students need housing, students don’t have lights or heat.” As reflected in this quote and reported by staff members, many Stars Connectors continued to feel unprepared to effectively support families with needs outside of Stars’ scope of service delivery. One staff member described this as a reality even before the pandemic, noting that staff anticipated this as an opportunity area when Stars first began serving, and primarily focusing on, students. Because the pandemic highlighted the need to work with students’ parents and increased families’ basic needs, these needs may have become more apparent to Stars Connectors, who typically did not have much engagement with parents.

The implementation team wanted to build on the case coordination meetings to identify strategies to make sure that families’ needs were met and that the appropriate staff were supporting families. The implementation team was particularly interested in exploring how Stars might coordinate with the Family Connector initiative, which provides families with case management and wraparound services to nurture long-term self-sufficiency. The team recognized that service coordination between these two initiatives would help Stars Connectors meet the needs identified by families while promoting Agape’s 2Gen approach.

#### **D. Next steps: Strengthening the 2Gen paradigm through Stars**

In August 2021, we facilitated a 90-minute brainstorming session with Stars Connectors and supervisors and Family Connectors and supervisors to discuss opportunities to strengthen coordination across these teams. We also conducted interviews with two individuals participating in the Stars and Family Connector initiatives to solicit their perspectives on how to enhance communication and coordination between the initiatives.

During the brainstorming session and interviews, staff members and families provided feedback on coordination between Agape’s 2Gen services:

- **Examine how data systems and processes can support coordination.** Because successful cross-initiative coordination requires data sharing and consistent performance metrics, staff members suggested that Agape’s current data system, Penelope, should allow for information sharing across initiatives and that data metrics should not vary by initiative.
- **Clearly define how coordination might take place for families.** Staff members from both initiatives wondered if cross-initiative coordination would require Stars Connectors to meet with parents more regularly. They also emphasized that Stars Connectors should focus on mentoring and supporting students. Staff said that the Family Connector initiative currently lacks the capacity to support every family participating in Stars and that Stars Connectors are not currently trained to support families facing the challenging situations navigated by Family Connectors. Staff members from both initiatives agreed that it is important for Agape to develop clear pathways for how a family might work with a Stars Connector and a Family Connector.
- **Build on past successes to continue supporting families who are stretched thin.** During interviews, two Stars parents reported feeling supported by Agape staff members. However, the small sample size suggests that many families continued to have limited capacity to deal with issues outside personal and household demands.

### III. Supporting Goal Setting and Pursuit in TeamWorks

The goal of rapid-cycle learning in TeamWorks was to help staff adapt their employment and education supports to a virtual setting to meet participants' heightened needs during the pandemic.

#### A. The Learn phase: Understanding the context and focus for change

As with Stars, goals in the Learn phase were to help TeamWorks identify challenges and their root causes. Through partnerships with the work group and TeamWorks implementation team—consisting of the director, supervisors, and a Connector—the research team was able to identify a focus for our work together.

#### **Finding 1: Virtual platforms can be a barrier to establishing trust and building authentic relationships between Connectors and participants**

In the work group meetings, staff members explained that the pandemic made it difficult to provide holistic services to participants, given obstacles to collaborating with partners and increases in participants' basic needs. Staff felt that as families faced needs that were more pressing than dealing with their education and employment goals—TeamWorks' typical areas of focus—it was more difficult to prioritize the initiative. At the same time, the switch to virtual services led to challenges related to logging online, such as lack of consistent computer and Internet access. A recent Pew survey, for example, showed that 41 percent of adults with incomes less than \$30,000 per year do not have a desktop or laptop computer at home (Vogels 2022). Although Agape provided devices for families to use to speak with their Connectors, poor Internet connections still made conversations difficult.

In response, the work group focused on the challenge of serving participants' range of needs. It identified two opportunity areas. The first was overcoming obstacles to communicating with partners and other Agape initiatives in a virtual space to continue providing seamless services. The second was reestablishing trust and promoting a safe space in a virtual setting, with the aim of helping participants become comfortable in identifying their needs and challenges. Staff members said that virtual communication made it difficult to foster a trusting environment because virtual communication can feel less intimate than a face-to-face or in-person connection, and speaking at home presents more risk for distractions and interruptions. In addition, staff members agreed that connecting virtually could be difficult because of technology or Internet challenges, which could make it hard for participants to work with Connectors to keep up with goals. Ultimately, the team decided that creating a trusting environment in a virtual space was the more significant challenge and selected it as a starting place.

#### **Finding 2: Setting goals promotes engagement, but it became difficult in a virtual space**

To understand more fully how staff members could create a supportive, trusting virtual environment, we led follow-up interviews with staff members and participants in January and February 2021 after our work group meetings. Through these interviews, the research team sought to identify success stories related to providing supports in a virtual space and understand factors that supported success. The research team learned that participants still trusted their Connectors and were satisfied with the support they were receiving during the pandemic. However, participants highlighted the importance of meaningful goal setting to remain engaged in and motivated to return to services. For example, one participant with a goal of home ownership said she was motivated to plan and complete short-term steps to make progress toward her long-term aim, which might otherwise feel overwhelming and out of reach.

Goal setting, however, had become more difficult in a virtual environment, largely because of the lack of physical presence between Connectors and families. Staff reported that a conversation via telephone or computer was not effective for in-depth conversations needed to uncover needs and set goals. Given this information, the implementation and research teams decided to promote more effective goal-focused conversations through remote services.

## B. The Innovate phase: Adapting an evidence-informed strategy to the initiative's context

In February 2021, the research team introduced the implementation team to Stepping Stones, a tool that supports participant-driven, goal-setting conversations. The goal of using Stepping Stones in TeamWorks was to be more intentional in goal-setting conversations to identify needs and goals despite technology limitations with virtual services (Box III.1).

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### **Box III.1. Objectives and data collection plan for testing Stepping Stones**

#### **Learning objectives**

- Understand if and how Stepping Stones complements existing assessment processes, enhances them, or both
- Understand whether the tool helped Connectors engage in more intentional and productive goal-setting conversations with participants
- Understand participants' experiences with the Stepping Stones tool

#### **Data collection activities**

- Survey of Connectors in May 2021 to understand how they used Stepping Stones
- Participant interviews in May 2021 to understand experiences with conversations that used Stepping Stones
- Debrief meeting with staff (Connectors, supervisors, and director) in June 2021 to gather suggestions about how to strengthen the use of Stepping Stones

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Stepping Stones is a tool within Mathematica's evidence-informed [Goal4 It!](#) curriculum (Derr and McCay 2018). Goal4 It! highlights the importance of self-regulation skills, such as planning and prioritization, in meeting goals (Bandura 1991; Cavadel et al. 2017; Mann et al. 2013). The overarching curriculum helps participants set meaningful goals, develop detailed plans for success, anticipate and plan for obstacles, and regularly review progress—all steps that support progress and goal attainment. The Stepping Stones tool aims to help staff rethink the assessment process by focusing on goal setting and empowering participants to drive their own needs assessments and develop goals that are personally meaningful and motivating (Figure III.1). Staff ask participants to pick an area on the tool they want to address, such as education, job skills, or housing. Staff members then help participants develop a goal related to that area, with the idea that participants will stick with the goals that they are motivated to achieve (Locke 1996).

Figure III.1. TeamWorks Stepping Stones tool, page 1

		NEED HELP 1	READY TO EXPLORE 2	MAKING PROGRESS 3	CONFIDENT & GOOD TO GO 4		
CAREER EXPLORATION	<b>Occupational Identity</b>	I'm not sure what job I want.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I know what job I want.
	<b>Professional Networks</b>	I don't have anyone I can call who works in the type of job that interests me or who can give me work-related advice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I'm well-connected to people who are working in the type of job that interests me.
	<b>Career Opportunities</b>	I don't know where to go to find "good jobs" that interest me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I know where to find "good jobs" that interest me.
EDUCATION	<b>Education and Training</b>	I don't have the education or training I need to get the job I want.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I have completed the education or training needed to get the job I want.
	<b>Credentials</b>	I don't have the professional certificates or credentials I need to get the job I want.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I have the professional certificates or credentials I need to get the job I want.
JOB READINESS	<b>Job Search Skills</b>	I don't know where or how to look for a job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I'm aware of and know how to use resources for identifying available jobs.
	<b>Resume and Cover Letter</b>	I don't have a resume or cover letter.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I have an updated resume and cover letter
	<b>Job Qualifications</b>	I don't know what jobs I qualify for.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I know what types of jobs I qualify for.
	<b>Interview Skills</b>	I don't have the confidence or skills to interview for a job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I feel confident and am ready to interview for a job.

The implementation team reviewed the Stepping Stones tool and made sure it included areas relevant to TeamWorks. After receiving feedback, the research team combined the standard tool, which focuses on barriers to employment such as inadequate housing and financial health, and added information about job skills, employment access, and education—areas related to TeamWorks’ services. Staff thought it was important to include both components to help participants identify and articulate employment and education needs as well as obstacles to meeting employment goals.

### C. The Improve phase: Collaborating with staff to test and refine the strategy

TeamWorks participated in two rounds of testing during the project. The first round began in April 2021 and focused on how Stepping Stones could support participant-driven goal setting. The second round of testing began in August 2021 and focused on additional tools that could help staff and participants engage in productive, goal-focused, and ongoing conversations.

#### 1. First round of testing: Stepping Stones

During data collection and debriefing in May and June 2021, staff members offered the following insights (Figure III.2):

- **Connectors thought the tool helped them articulate participants’ needs.** TeamWorks already used an employment assessment at intake. This assessment prompted participants to set a high-level goal related to employment or education, but staff said that Stepping Stones allowed for ongoing conversations about interim goals, the steps that participants need to take to achieve those goals, and barriers that might get in the way. One supervisor reported the following: “We have two specific goals, whether we used the tool or not—you choose education or employment for a goal.... How they achieve those goals, that’s where the tool came into place. If your goal is employment, we would send

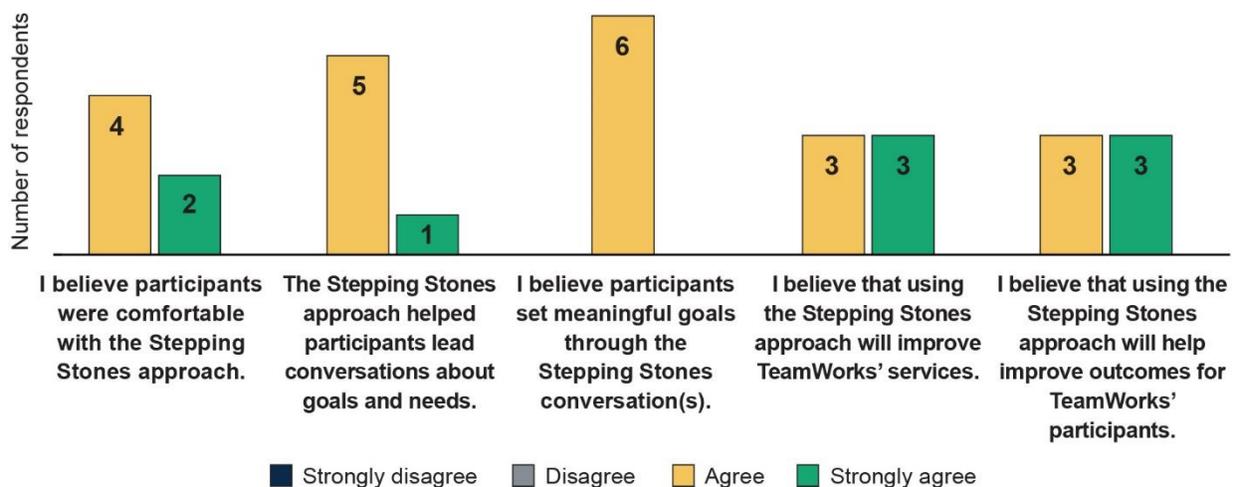
them job leads, but if there’s a barrier in place, this tool helped identify that barrier. This showed why the job leads weren’t effective.”

- **Many participants appreciated having direct goal-setting conversations.** One participant said that the tool helped her communicate what she wanted to work on and where she needed help. TeamWorks leadership reported that using the tool helped the initiative enhance Agape’s voice-and-choice approach, because it helped participants drive conversations about their goals.
- **Staff noted that Stepping Stones worked better for some participants than for others.** Staff said the tool sometimes overwhelmed individuals who needed more support or had made less progress on their goals. Still, they felt this would be less of a challenge as Connectors became more familiar with the tool and more comfortable using it with participants.
- **The tool prompted conversations about needs and challenges beyond TeamWorks’ service area.** Staff members reported that participants gravitated to the Stepping Stones section that addressed basic needs, an area Connectors wanted to include to uncover potential employment barriers and serve participants holistically.<sup>4</sup> Just as Stars Connectors reported lacking the training needed to address parents’ out-of-scope needs, TeamWorks Connectors said they were unprepared to engage in conversations about topics such as housing and financial management, areas the Family Connector initiative focuses on. To address this opportunity area, TeamWorks supervisors developed a structured guide for referring participants to other 2Gen initiatives or external partners and resources. The guide helped staff coordinate services, a key goal for Stars and TeamWorks throughout this project.

“It used to just be, ‘What do I think my goal is? How am I doing with this?’ With this, it’s different because they hit on every topic and you’re rating yourself.... If we know what we’re lacking on, then our Connector can elaborate more fully on what we had to do.”

— TeamWorks participant (on Stepping Stones)

Figure III.2. TeamWorks Connectors’ impressions about Stepping Stones’ effectiveness



Source: TeamWorks Connector survey. Sample includes 6 respondents.

<sup>4</sup> These topics include housing, child care, transportation, personal well-being, family well-being, social support, money management, and financial supports.

## 2. Second round of testing: Structured agendas to facilitate goal monitoring and sustain intentional goal setting

The first round of testing generated questions about TeamWorks' ongoing use of Stepping Stones. The second round of testing built on the first by facilitating the process of ongoing goal setting and monitoring. In July 2021, the research team developed structured agendas for initial and follow-up goal-setting conversations between Connectors and participants. Goal4 It! guided the development of the agendas, which highlight additional tools within the curriculum that could support Connectors' conversations (Box III.2). The agendas reflected principles of effective goal setting, including supporting participants in developing goals, encouraging participants to develop detailed plans, and helping participants anticipate what could prevent progress and how to address obstacles proactively.

During testing, the emergence of the delta variant of COVID-19 and leadership turnover stretched staff. Despite these obstacles, each Connector had the opportunity to test the new approach with at least one participant. During this round, Connectors could choose which tools to use. The structured agendas suggested, rather than required, the use of tools to support different steps in the goal-setting process. In the staff survey, we learned that all Connectors continued to use Stepping Stones and that about half used My Goal Plan and Potholes and Detours. In Box III.3, we outline our learning objectives and data collection plan for the second round of testing.

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### Box III.2. Tools for the second round of testing

After our initial round of testing, Connectors continued using the Stepping Stones tool and added several other tools from the Goal4 It! curriculum.

1. **My Goal Plan.** A structured template to help program participants specify details about their plans to pursue a goal. It asks them to provide details about what they want to accomplish, consider possible barriers, and reflect on progress.
2. **Potholes and Detours.** A worksheet in which staff and participants explore potential barriers to meeting a goal and brainstorm strategies to overcome those barriers.
3. **Review, Assess, Plan (RAP) sessions.** RAP guided the structure for follow-up goal-setting meetings. Through RAP, staff members ask participants to review progress, assess how things went and why, and plan what they will do before the next check-in. It is a simple structure that encourages intentional reflection and planning.

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### Box III.3. Objectives and data collection plan for testing additional support tools

#### Learning objectives

- Understand how staff members implemented the principles of effective goal setting and monitoring
- Understand staff members' experiences using tools to facilitate effective goal setting and monitoring
- Understand participants' experiences with goal setting and monitoring

#### Data collection activities

- Survey of Connectors in October 2021 to understand how they used the tools
  - Participant interviews in October 2021 to understand experiences with conversations that used the tools
  - Debrief meeting with staff (Connectors, supervisors, and director) in October 2021 to gather suggestions about how to strengthen the use of the additional tools
-

After the second round of testing, in September and October 2021, staff and participants reported the following:

- **The additional tools helped Connectors hold more structured goal-setting sessions.** The tools helped staff prepare for sessions and helped participants formulate more detailed plans for achieving their goals. For example, one Connector who used My Goal Plan reported about a participant who wanted to become a first-time home buyer: “It was helpful with her putting things into perspective. She never used to write things down, [so] putting things in order helped her prioritize reaching the goals she now set.”
- **The refined approach was not drastically different from TeamWorks’ typical goal meetings, but staff still felt the tools were valuable.** Many staff members agreed that the agenda and tools helped participants set realistic goals, break them down, and develop detailed plans (see Box III.4 for the follow-up meeting structure). Participants echoed this, saying they felt supported in developing detailed goals. For example, one participant focusing on financial management shared, “I know how to establish my credit, I know how to build my credit, I know how to plan for what I want, what I have to do, and what I have to go through to get it. I know what I’m looking for now, so it’s been easier.”
- **The new tools continued to prompt conversations about needs outside TeamWorks’ scope.** Staff members suggested that the additional tools might be more useful if the Family Connector initiative, which is designed to address non-employment needs, adopted the same approach. As one Connector reported, staff thought this strategy would ensure a common language across initiatives: “Because this is not a tool being used by Family [Connector] or clinical [staff], it puts us at a dead end. It helps us to identify [participants’ needs], but then what? The goals they are identifying are things that Family [Connectors] would help with.” If Agape decides to continue using all or parts of the new process, the organization might explore using it outside of TeamWorks, as appropriate.
- **Testing reinforced the need for collaboration across 2Gen initiatives.** The pandemic increased families’ basic needs, overshadowing concerns about employment and education and causing some participants to focus on other priorities. TeamWorks staff members work closely with the Family Connector initiative, but their collaboration became more challenging in a remote environment, because they were no longer working in the same building. A next step for TeamWorks could be to step back from goal-setting processes and explore the challenge of virtual collaboration, identifying strategies to support seamless services across the initiatives.

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**Box III.4. TeamWorks agenda structure for goal-focused follow-up meeting**

**Review** progress toward goal set last time.

- Consider using My Goal Plan tool

**Assess** how things went. Ask the participant what got in the way of success.

- Brainstorm solutions to obstacles identified.
- Consider using Potholes and Detours worksheet

**Plan** next steps. Help the participant determine what they will do next.

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## D. Next steps: Strengthening the 2Gen paradigm through TeamWorks

Across both rounds of testing, our research team—working with the implementation team—identified several lessons. These lessons reflect key considerations about addressing root causes and engaging partners to promote coordinated services.

- **The tools are valuable, but consistency is critical.** Given that pursuing goals is a long-term process, Goal4 It! tools should be used on an ongoing basis. With participants unable to engage regularly in TeamWorks sessions because of personal challenges associated with the pandemic, Connectors were unable to use the tools consistently. To get the most out of the approach, TeamWorks might prioritize using the tools with individuals who are best equipped to pursue employment or education in the moment, while continuing to make sure participants with more pressing needs are referred to appropriate supports within Agape.
- **Other Agape initiatives could adopt Stepping Stones to help the practice last.** Staff members said that the tools they tested were valuable and worth maintaining, but they acknowledged that sustaining them will depend on whether other 2Gen initiatives that work closely with TeamWorks adopted Stepping Stones. These initiatives include the Family Connector and clinical therapy initiatives, among others.
- **As Agape works toward testing and sustaining the tools, it should collaborate with staff members across initiatives.** Testing new strategies requires buy-in and active participation from program staff. At the end of our project, some staff members expressed a desire to have contributed more directly to refining the Stepping Stones tool. If Agape expands the use of Stepping Stones, it should engage staff across initiatives. One strategy is to provide time for staff to try out the tools with one participant and provide feedback before rapid-cycle testing begins in their initiatives, setting the stage for active contributions to the development and testing processes.

## IV. Sustaining Rapid-Cycle Learning and Two-generation Program Improvements

Staff believed the strategies we co-developed and tested with Stars and TeamWorks strengthened participant engagement, supported families effectively, and enhanced goal-setting and monitoring processes. Stars staff members, for example, said the strategies empowered them to collaborate in meeting families' diverse needs, and TeamWorks staff shared that participants benefitted from more intentional and structured case management conversations. The rapid-cycle learning that we conducted revealed important lessons for Agape and its partners—including fellow two-generation organizations and philanthropic leaders—to consider to further support staff members and families.

### A. Using rapid-cycle learning to promote equitable change

Rapid-cycle learning helped Agape use equity-focused principles to guide program change. These principles helped the change efforts acknowledge the increased disparities that 2Gen families were facing due to COVID-19, and they reflected Agape's no-wrong-door and voice-and-choice approaches, which elevate the voices of affected populations. Through the REVISE 2G partnership, the research team and Stars and TeamWorks participants, staff, and community partners worked to understand root causes of program challenges and opportunities and to design, implement, and adapt solutions to these opportunities. The solutions targeted long-standing issues that COVID-19 showed in new ways. For Stars, testing worked to promote parent engagement by improving coordination among staff members, a need that existed before the pandemic began. In TeamWorks, strategies worked to nurture more structured, participant-driven goal setting. This approach sought to tap into participants' motivation to remain engaged in the initiative despite many other responsibilities, a reality the pandemic only strengthened. The following lessons reflect the learning that the partners gained from testing these strategies. Two-generation, philanthropic, and research partners can consider these lessons as they design and test their own change projects.

#### 1. Emerging opportunity areas can reflect organizational challenges that always existed

Initially, our charge focused on helping Stars and TeamWorks staff members pivot in light of COVID-19 and provide virtual services. However, Stars' and TeamWorks' priorities were not limited to the digital space. Both initiatives' priorities reflected organizational challenges that were in place before the pandemic, but the crisis shined a new light on those priorities. For Stars, Connectors were stretched thin and worked to support parents in ways they felt unqualified for. For TeamWorks, virtual services did not automatically translate to a less trusting or nurturing case management environment. Across both initiatives, Connectors spoke to the challenges of stepping outside their areas of expertise to support families fully, a reality that was true before the pandemic. To this end, Agape should work to consider organizational or structural factors that might influence challenges that come up, such as how staff members work together, use particular tools to probe participants' needs, and provide multigenerational supports.

#### 2. Engaging 2Gen staff and participants can reveal root causes and potential strategies to address them

Throughout the project, engaging partners with expertise in 2Gen's programmatic needs and opportunities was critical. These partners included Stars and TeamWorks staff members, participants, and staff from community organizations who contributed insights through the work group meetings and individual

interviews. This approach underscores a major tenet of equity-focused research: To nurture “citizen control” over change, partners and community members should play an active role in decision making (Arnstein 1969) and research processes (The Annie E. Casey Foundation 2014). Of note, because of participants’ limited bandwidth, it was especially important to lift up staff members’ voices and make them shared decision makers. Although the research team engaged participants throughout the project—getting their input through root cause analyses and data collection after testing—it was also important to be mindful of their competing priorities during a crisis. Staff members’ close relationships with families and knowledge about participants’ needs helped buffer this challenge and make sure that our work remained participant driven.

### **3. On-the-ground program champions are essential to the success of rapid-cycle learning**

The Stars and TeamWorks implementation teams helped design, refine, and manage implementation of the strategies. These team members helped in five key areas: (1) overseeing day-to-day, on-the-ground operations; (2) offering expertise about the initiatives’ context and in-depth knowledge that the research team lacked; (3) streamlining and facilitating communication with other initiative staff; (4) supporting logistics associated with rapid-cycle learning, including scheduling data collection activities; and (5) ensuring that operations remained consistent despite turnover in Stars and TeamWorks. By partnering with staff across levels, the teams ensured that varied perspectives and expertise guided the work. Connectors, for example, contributed firsthand accounts about service delivery and participants’ experiences. Initiative leaders, such as directors and coordinators, managed coordination and anchored testing to organizational and strategic priorities.

## **B. Strengthening two-generation approaches to meet families’ needs**

There is no one-size-fits-all approach to implementing and maintaining two-generation services. Because of this, and because families’ needs and contexts change, organizations like Agape must constantly adapt how they provide two-generation services. Rapid-cycle learning is one strategy to support this change and make sure services respond to families’ needs.

### **1. Rapid-cycle learning is an inclusive method for supporting two-generation change efforts**

Two-generation organizations like Agape could consider using rapid-cycle learning to drive change. Rapid-cycle learning allows staff to quickly test and refine solutions to identified growth areas, particularly at a small scale. Rapid, small-scale testing creates a safe space for trying new ideas, because it allows for setbacks and learning before using strategies on a broader scale. To understand if and how solutions are effective, the rapid-cycle learning that organizations conduct should use a range of data collection methods, such as interviews and focus groups (qualitative) as well as on surveys and administrative data (quantitative).

Although rapid-cycle learning can help Agape and fellow two-generation partners design and test strategies in a low-burden way, the organizations should be mindful of potential tensions between staff members’ capacity and involvement in co-creation. In particular, although staff across levels should be involved in change, efforts to decrease their burden can simultaneously decrease involvement in the research process, shortchanging a key tenet of equity-focused work (Gaddy and Scott 2020; Parekh et al. 2019). For example, in REVISE 2G, when tailoring and refining the Stepping Stones tool, the research

team primarily called on the TeamWorks implementation team to avoid burdening other staff. Some Connectors who were not on the team reported they wanted to be more involved in the research processes. In leading their own rapid-cycle learning efforts, Agape and other two-generation experts can take time to plan for meaningful levels of voice, power, and ownership among staff, helping ensure they become key decision makers in change projects (González 2020).

## **2. Enhancing coordination across two-generation initiatives can help meet families' needs**

To help meet families' diverse needs, two-generation organizations rely on coordination across initiatives, services, and departments. In REVISE 2G, TeamWorks and Stars staff identified opportunities to improve coordination and 2Gen service delivery. Both groups said that their participants frequently raised needs that Family Connectors help address, and TeamWorks indicated that clinical staff might be well positioned to take on some of the needs participants identified through Stepping Stones. In addition, Stars and Family Connector staff described how Agape could enhance data systems. Based on these reports, Agape and other two-generation partners might consider using rapid-cycle learning to achieve the following objectives:

- **Test tools and strategies in multiple two-generation services or initiatives.** For REVISE 2G, TeamWorks staff perceived that Stepping Stones would be a useful tool across initiatives to support a common process and language for identifying participant needs. Agape can encourage other 2Gen initiatives to test Stepping Stones with new participants during the intake process and with existing participants during ongoing case management conversations. Of note, staff members and participants previously expressed a desire for more streamlined and coordinated intake (Shenbanjo et al. 2020), a goal that adopting Stepping Stones more widely could help meet. As organizations test solutions and tools within specific two-generation initiatives, they can take time to hone strategies, improve how they work for staff members and families, and prepare for effective and streamlined scaling across departments.
- **Assess how to use and share administrative data to support coordinated services.** The testing that the Stars and TeamWorks teams conducted did not use administrative data from Penelope, Agape's information management system, because of staff turnover and data quality issues. For example, the research team tried to use Penelope to determine how many Stars families' contact information was either missing from or incorrect in the system, but records were stored in a way that did not allow us to access this information. During the brainstorming session with Stars and Family Connector staff, these partners outlined opportunities for improving and refining how Agape uses data and Penelope, reflecting the same ideas that surfaced during the implementation study. During brainstorming, Stars and Family Connectors said that Penelope does not currently allow them to share data easily; easy access to the data could give staff a more holistic picture of families' needs. Agape is limited in how much it can tailor Penelope's off-the-shelf functionality to help staff coordinate services. However, in line with other recommendations for two-generation data systems (The Annie E. Casey Foundation 2018), the organization and other two-generation agencies can consider adopting the following strategies to improve data use:
  - Identify opportunities for collecting additional data on children, parents, families, or initiatives to paint a more holistic picture of families' needs and progress
  - Ensure that records for the whole family are correct and complete to link parent and child records accurately and track two-generation progress

- Engage in data dives, through which staff members collaborate to interpret data and assess how their initiatives are influencing children and parents and how greater coordination can strengthen outcomes
- **Design and implement strategies for greater coordination across two-generation services and departments.** In the REVISE 2G context, Agape can use rapid-cycle learning to test expansion of Stepping Stones or case coordination meetings. However, there are additional ways a two-generation expert like Agape can use rapid-cycle learning to identify and test other strategies to promote coordinated services. For example, organizations could engage community partners, staff members, and families to understand challenges associated with providing and receiving several services for different needs. These strategies would reflect evidence about two-generation services, place-based approaches, case management, and equitable service delivery. Using an approach similar to the work with Stars and TeamWorks, organizations could test and learn about strategies by using data to understand staff members' and participants' experiences and the degree to which these groups think the strategies promoted coordination. Organizations would continue this cycle to arrive at a set of approaches they could include in their two-generation toolkits.

## V. Moving Forward and Sustaining Change

The pandemic has forced many changes to ways of working, living, and thriving. In particular, its disruptions have caused greater strain on people of color who experience low incomes (Brown 2020; Gemelas et al. 2022), such as 2Gen families. When the COVID-19 pandemic took hold, Agape acted quickly to continue delivering services, but families' increased needs have strained the organization and its staff. In response, Agape collaborated with Casey and Mathematica to design and test program improvement strategies through the REVISE 2G project. The opportunities identified through our work can help Agape staff members and other two-generation partners plan and lead their own change efforts, using rapid-cycle learning as a starting point for equity-focused, data-driven improvements to enhance two-generation services.

Going forward, Agape, Casey, and Mathematica will continue to partner to share lessons about leading rapid-cycle learning and two-generation program improvements that are equitable. As Agape continues its long-standing relationship with the Tennessee Department of Human Services to advance 2Gen and coordination with Memphis partners, upcoming dissemination and technical assistance will work to strengthen staff members' capacity to be learning and thought partners to fellow human services agencies and lead equitable change without external support. Staff members will be able to move beyond the research-practice partnership that drove rapid-cycle learning in REVISE 2G, using tools they gain to independently design, implement, and refine their own learning cycles. For other two-generation organizations and philanthropic and research partners, dissemination will provide key lessons, considerations, and strategies for rapid-cycle learning that uplifts cross-sector partnerships and equity principles.

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**Appendix A:**

**REVISE 2G Research Questions**

**Table A.1. REVISE 2G research questions**

Set	Questions
<p>1. Questions related to the Learn and Innovate phases to identify opportunities for improvement and develop corresponding program strategies</p>	<ol style="list-style-type: none"> <li>1. What are participants' and staff members' most pressing needs, challenges, and barriers to participation and engagement?</li> <li>2. How does the pandemic reinforce or exacerbate existing challenges and inequities for participants and staff?</li> <li>3. How can Stars and TeamWorks Connectors establish trusting, authentic relationships with participants to engage and empower them during the pandemic?</li> <li>4. How can Stars and TeamWorks provide virtual services that align with the initiatives' quality standards, missions, and visions? What are the key components of virtual service delivery?</li> <li>5. How can Stars and TeamWorks remain flexible for participants while also supporting staff?</li> </ol>
<p>2. Questions related to the Improve phase to help understand implementation of program strategies and to inform ongoing refinements</p>	<ol style="list-style-type: none"> <li>1. What are the experiences of Stars and TeamWorks participants in the initiatives, and how do different types of participants experience the initiatives they engage in differently?</li> <li>2. What are staff members' levels of comfort, buy-in, and satisfaction with implementing Stars and TeamWorks virtual services? What do staff need to implement virtual services well?</li> <li>3. What parts of Stars and TeamWorks virtual services are most rewarding for staff and participants, and what parts are most challenging? What are promising strategies for overcoming obstacles?</li> <li>4. How might Stars and TeamWorks adjust their approach to virtual services in response to staff and participant feedback?</li> </ol>
<p>3. Questions on influence and sustainability to understand program strategies' utility and potential for long-term use</p>	<ol style="list-style-type: none"> <li>1. Do new ways of providing Stars and TeamWorks influence key programmatic outcomes (such as participants' trust, engagement, satisfaction, and take-up of other Agape services)?</li> <li>2. What Stars and TeamWorks processes are most related with key programmatic outcomes?</li> <li>3. Do Stars and TeamWorks virtual services address participants' pandemic-related barriers to school attendance and employment?</li> <li>4. What are the key differences in how in-person and virtual Stars and TeamWorks services are delivered and received?</li> <li>5. What opportunities exist to strengthen Agape's 2Gen model with virtual services? What intentional steps must Agape take to maintain a strong 2Gen approach virtually?</li> <li>6. What data gaps still exist for understanding the short- and long-term successes of virtual services, and what types of information might address them?</li> </ol>

## **Appendix B:**

### **Data Collection Methods for Testing**

As part of the rapid-cycle learning process, Mathematica collected data during the Improve phase of the Learn, Innovate, Improve framework to understand and refine Stars' and TeamWorks' strategies and how they worked. Each initiative had distinct data collection activities, but their structures were similar. The primary data collection methods were interviews, surveys, and debrief meetings.

## A. Stars

### 1. Interviews

We conducted three sets of interviews with Stars staff members and one brainstorming session with Stars Connectors and Family Connectors. All interviews took place over telephone or video call and were scheduled with assistance from the Stars implementation team.

- **Interview set 1.** In January 2021, we talked with Stars Connectors to better understand the factors that might have driven low student and parent engagement. We conducted three, 45-minute virtual interviews for each community that Stars serves. In each interview, we talked to two Connectors. The interview topics included methods Connectors typically used to contact and engage parents, training and resources Connectors receive about parent engagement, and successes and challenges they have faced when engaging parents during the pandemic.
- **Interview set 2.** In March 2021, we used four, 30-minute video calls to speak with eight Stars Connectors and three Coordinators who attended the case coordination meetings. The structure for three interviews resembled the first set; each conversation included two Connectors who worked in the same community. The fourth interview was with two Connectors who presented during the case coordination meetings. In this second set of interviews, the interview topics included how COVID-19 affected service delivery, what staff members thought of the case coordination meeting, how the meeting could improve, and whether staff members had other ideas about how to improve service delivery.
- **Design session.** In August 2021, we organized a 90-minute brainstorming session with Connectors and supervisors from the Stars and Family Connector initiatives. This brainstorming session focused on discussing successes and challenges related to coordination, opportunities to strengthen two-generation services for Agape's families, and opportunities to strengthen coordination between the Stars and Family Connector initiatives.
- **Interview set 3.** In September 2021, we talked to two parents who have children in Stars. The one-on-one interviews were less than 30 minutes, and the topics were parents' experiences with the Stars and Family Connector initiatives, enrollment processes, parents' engagement with their Connectors, and approaches Agape could use to improve their services. Parents received a \$25 gift card for their participation.

### 2. Surveys

After each case coordination meeting, we collected data from staff members through a SurveyMonkey survey. The surveys focused on staff members' experiences with the case coordination meetings. After the first meeting in April 2021, 12 staff members responded to the survey. After the second meeting in May 2021, 15 staff members responded to the survey. In both survey rounds, at least 2 respondents were from each of three communities that Stars serves.

### **3. Debrief meetings**

After each round of data collection, we debriefed with the Stars implementation team during our regular monthly meetings over video. To debrief, we compiled the data findings into a PowerPoint file and presented them to the team. The first debrief meeting took place in March 2021, lasted 60 minutes, and focused on how to improve the case coordination meetings. The second meeting took place in May 2021, lasted 60 minutes, and focused on how to approach the design session with Family Connectors and improve the case coordination meetings.

## **B. TeamWorks**

### **1. Interviews**

We conducted two sets of interviews with participants after each round of testing. All interviews took place over the telephone or video call and were scheduled with help from the TeamWorks implementation team. After the first round of testing ended in May 2021, four individuals participated in 30-minute, one-on-one interviews. The interviews primarily focused on the participants' experiences engaging with the Stepping Stones tool for goal setting. After the second round of testing ended in October 2021, two individuals participated in 30-minute, one-on-one interviews. The interviews focused on their experiences engaging in the goal-setting process with their Connectors, including using the goal-setting tools we introduced to TeamWorks staff members. Individuals received a \$25 gift card for their participation.

### **2. Surveys**

We administered a survey with Connectors after each learning cycle in May and October 2021. The survey about the first round of testing focused on how often Connectors used the Stepping Stones tool with participants, as well as Connectors' experiences using the tool and their perception about how the tool worked for participants. The second survey asked about the goal-setting tools that Connectors used with participants, Connectors' experiences using the tools to support participants' goals, suggestions for how to improve the tools, and Connectors' reflections on the rapid-cycle learning process. Both surveys were administered using Survey Monkey. All six Connectors who tested the strategies responded to the survey.

### **3. Debrief meetings**

In June 2021, after the first round of testing ended, staff members participated in a 90-minute virtual debrief meeting. The meeting included activities and discussion focused on learning about how Connectors implemented Stepping Stones and perceived the tool's value for participants. Staff members also reflected on findings from the staff survey and provided suggestions for how to refine use of the tool going forward. In October 2021, after the second round of testing ended, staff participated in a 60-minute virtual debrief meeting about Connectors' use of the goal-setting agendas and tools, adherence to key goal-setting principles, the value-add of the goal-setting approach compared to Connectors' traditional processes, challenges Connectors faced while using the tools in a virtual setting, and staff members' feedback on the rapid-cycle learning process overall.

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