

EXPERIMENT REPORT

Activity Request Tracker

Background

This is the first experiment in service of validating the MVP concept of digitizing the TTA request process. The digitization of this process will enable Regional Office Program Specialists to be able to initiate TTA Requests and track their status through completion. This prototype will combine TTA Activity Summaries, Next Steps, and Task Completion. This system will allow Regional Program Specialists to view TTA over time, for specific grantees, and across specific topic areas.

Details

Our session with each of the 4 participating Program Specialists began with a set background questions to learn more about the specific details of their role within their region. Following the introductory questions we provided each participant with a series of tasks using a prototype of a system for requesting TTA Activity and tracking progress toward outcomes.

Program Specialists were presented with 2 scenarios using the prototype:

SCENARIO 1: TTA Request from Monitoring Report

Requesting TTA in response to a Monitoring Report that has been created following an incident with one of the grantees in the program specialist's region.

SCENARIO 2: Activity Tracker

This prototype was pre-populated with objectives and updates from a series of TTA activities. The participants explored how they would use the prototype to track and follow-up on TTA Activities.

Learning - Themes and Insights

Disconnected experiences

Information in each step of the process of a TTA response to an incident with a grantee is disconnected and captured in different systems.

Incident report (ECKLC) → TA Request (word docs stored in HSES and shared through a series of emails) → TA Deployment (Monthly Travel Plan) → TA Activity Planning (Likely varies from contract to contract and region to region) → Activity Report (HSES)

Through connecting each step in the process we have the opportunity to improve the experience for everyone involved and capture the data necessary to identify trends and understand the full TTA cycle.

Process starts with incident report

The monitoring process can happen concurrently with the TTA response to the incident. The Incident report, Activity Request, Activity Reporting, and Monitoring reports are all important pieces of data to understand the complete lifecycle of information related to the TTA activities.

Collaboration

The TTA process is a collaboration between the regional office program specialists, the regional TTA specialists, and the grantees. For a tool to be successful it will need to serve each group's needs and enhance their collaboration and communication.

Augmenting current communications and touchpoints

The program specialists, Grantee Specialists, and Grantees communicate through a series of phone calls and meetings. These meetings are a meaningful part of the relationship and communication between these roles. There is an opportunity for a tool that connects the steps in the process to augment and enhance these existing interactions.

One request to many activities

A single TTA request may prompt a series of activities by multiple specialists in service of meeting the outcomes outlined in the request. By tracking completed objectives and tasks related to the outcome we can see the summation of all of the efforts to address the underlying issue.

Outcomes not objectives

In our conversations the program specialists defined the intended outcomes when requesting TTA. The Grantee Specialists work together with the grantee to define objective and tactics in service of meeting those objectives.

Next Action

1. Refine prototype to incorporate user feedback

- a. Topic/Areas should more closely align to areas defined in SOW and be specific to different specialists
- b. Have request focus on defining outcomes over outlining objectives
- c. Have objectives and tasks more clearly answer to objectives
- d. Refine visual and interface design to make information hierarchy more intuitive.
- e. Have the Activity Request process initiate with incident and link to Monitoring Report upon completion.

2. Create prototype of Grantee Specialists (or other TTA provider) experience of reporting activity related to outcomes defined in Activity request.

- a. This will help validate direction for complete experience
- b. Will help test collaborative process

3. Explore opportunities for using data collected in the task tracking process.

- a. Identify trends can be identified and surfaced to inform other roles (CORS, Central Office, etc.)
- b. Explore the benefits of capturing activity oriented to outcomes
 - i. What can this tell us over time?
 - ii. What new views of TTA activity are enabled?