EXPERIMENT REPORT

Activity Request and Task Tracker

Background

This is the second 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 3 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 new Head Start Director for a grantee that is under-enrolled.

SCENARIO 2: Outcome/Objective Progress Tracker
This prototype was pre-populated with objectives and updates from a series of TTA activities. The participants described how they would use the prototype to track and follow-up on TTA Activities.

Learning - Themes and Insights

Collaborative Process

Scheduling and coordinating TTA Activities is a collaborative process. PS, GS, and TTAC work together to plan when activities can happen.

In this process the requests/referrals serve different users in different ways for example: in Region 5:

- Requests are shared for information and/or approval for different roles:
- Supervisors are copied to be informed
- TTAC gets request to begin scheduling
- CORs - meets with TTAC twice a month - spreadsheet of referrals. `It has the queue for the GS.

Existing Tools and Processes

All of the regions we've spoken with have variations in the request process. In each case a copy of the request is saved to HSES but is distributed by other means, most often email, to TTACs and CORs for coordinating activities and travel.

Some regions have more robust interfaces, for example Region 1 and 5 TTACs keep a tracker of deployments, requests, and activities in Excel and Region 10 uses Smart Sheets to track requests, deployments, travel plans, and other info related to TTA activities. This new system would either integrate or compete with this process.

Across the regions we've spoken with, in addition to digital forms there are also phone calls and in-person conversations. This new system would need to be a part of those activities too.

We have not identified a tool or process that connects outcomes defined in TTA requests with objectives completed during activities.

Completing Outcomes and Objectives

In this experiment each of the Program Specialists didn't feel confident relying solely on the information in the prototype to confidently say an outcome had been met. There are several factors that impact their confidence.

Level of detail
Each of the Program Specialists we've talked with would need more details and context around completed objectives to know if the outcome had been met. They would need to know more about strategies put into place by the grantee and steps for the GS to follow-up.

One PS said they would need to know the intention of objectives and what the GS would do to "close the loop" with the grantee. Saying, "From a PS standpoint, I need to have more info. I see where it's a bit more efficient to not have a lot of the narrative, but want to know how the loop is closed or what the Next Steps are from a TTA activity."

Communication
Currently the Program Specialists and CORs have ongoing communication with GS and grantees via phone calls, emails, and scheduled meetings.

One of the PS we spoke with said "…if it's not complete, I would email the GS to ask more questions about the situation to see what is the next step --- what is the plan?"

Clearly define outcomes/objectives/tasks
Each program specialist and region seems to have nuanced definitions of outcomes, objectives, strategies, and next steps. As each PS interacted with the prototype there was some discussion about the distinction between these terms and how they were used in their region.

In some cases the outcome is a high-level goal without specific expectations defined, while other PS are more specific about actions and deliverables they would like to see.

Hesitation to attribute outcomes to activities
Another piece of hesitation may come from a reluctance to make a causal relationship between TTA Activities and measurable outcomes for grantees. One PS said, "…In terms of "outcomes of those referrals," that's muddier. We can know if a GS was dispatched, but we can't know if the grantee's action was related to the TA."

Documentation
In addition to context and details of objectives and tasks the Program Specialists we spoke with would also want to see documentation of measurable improvement where possible. For example, for an enrollment issue they'd want to see documentation of the improved enrollment rates.

Dynamic needs
Requests are often kept open with additional objectives and activities. One PS said, "…every grantee engagement yields new insights and you might leave the request "open." This "grantee" engagement is open, but it may not be connected to the original deployment request."

Because an outcome may be broadly defined and relate to multiple TTA areas it can be difficult to describe an outcome as done, even as objectives are being completed.

Desirability

Each of the program Specialists we spoke to recognized the potential in being able to track progress from request to completion of objectives and outcomes.

"That would be a great idea. To roll up requests in a particular area. Did TA yield the anticipated outcome. And if it didn't, where would it fall short. Intervention as prevention would be a great system to have in place."

One PS commented on the objective/task tracking, saying, "I like the specificity and the check-boxes. Even the one that wasn't checked, it gave me the impression they talked about something." These completed tasks help create assurances that it didn't fall off the screen or get forgotten.

Next Steps/ Future Experiments

Collaboration and Communication

The TTA specialist deployment process requires communication and collaboration between CORs and Program Specialists in the Regional Offices with their TTA coordinators and specialists. The tool for making requests and tracking progress should augment the existing interactions between these roles.

To effectively evaluate the complete experience we will need to do research with all users involved in the process. There are several areas of collaboration and communications that can be explored:

- Evaluate objective/outcome completion tracking with Program Specialists using Tracker to document communications and progress in the existing process.
- Identify opportunities and evaluate solutions for incorporating communications into the application. Determine how we might connect email and other communication channels into this tool. How can we associate comments and questions to the objective they are referencing?
- To evaluate a multi-user experience we can create a prototype that would enable PS, GS, and TTACs to coordinate planning and reporting.

Taxonomy and Terminology

To have consistent measures across regions there needs to be consistent use of terms, what they mean and how they relate to each other. To make progress towards consistent terms we need to identify existing terms and definitions. Once the existing terms are understood we can create and evaluate solutions for unifying them.

Existing Tools and Processes

Each region has a different means of tracking TTA requests and deployments. To be a viable solution the new system will need to either integrate with or replace these incumbent tools and processes. Identify existing solutions and opportunities to

connect them and share data. Once systems and opportunities are identified we can evaluate solutions for connecting with these systems.