

Activity Report Content

Background

TTA Specialists complete reports following each TTA Activity with grantees. In our initial research interviews with Central Office and Regional Office TTA staff, these Activity Reports were continually mentioned as a data source. Activity Reports were designed to document specialists' interactions with grantees. The general sentiment is that the Activity Reports contain a wealth of data about TTA activity, but they are rarely referenced because they are difficult to access and search.

This content assessment exercise was designed to help determine what information documented in activity reports by Grantee Specialists (GS) is the most valuable to Program Specialists (PS) as they track the progress of grantees. Through this exercise we hoped to learn more about:

1. What is the value of the existing Activity Reports to PS?
2. What are PS looking for when they need to know about TTA Activities?
3. What in the narrative data is most valuable when making decisions?
4. What makes them more or less confident in understanding the TTA activities and their impact?

Expected Outcomes

In this exercise Regional PS were given GS Activity Reports and instructed in a content evaluation exercise where they read and then highlighted areas of importance in the documents. We use this method to determine the relative importance of pieces of information which will help us refine the content and future experience.

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 2 or 3 (depending on time available) anonymized activity reports. These reports covered situations where a GS had been deployed in response to a transportation issue, a child safety incident, and work with a new grantee.

The participants were instructed to:

1. Highlight in green the things that are the most valuable for you to know, and what makes you feel most confident of your understanding of the TTA provided.
2. Mark in red the things that are least valuable and/or make you feel less confident of your understanding of the interaction.

Results

Learning, Themes, and Insights

Linking related activities

It is important to see how Activity Reports relate to each other and how they meet learning objectives for the grantees. The program specialists could benefit from Activity Reports linked together based on all activities that address a specific need, this would make it easy to determine if a TTA activity is part of a larger effort or set of trainings.

The specific details of past reports are important if the program specialist is looking for something about a particular situation. Generally, aggregate reports for a given timeframe will provide a more useful level of detail. An overview will make it easier for program specialists to have a view of all activities for all grantees.

Tracking Progress

Currently it is difficult to connect objectives outlined in TTA Requests with outcomes of TTA activities. The program specialists we spoke with wanted to see measurable and verifiable actions the grantee and specialists were taking. They expressed a desire to be able to see progress on what has been implemented between the incident and the report.

Actions and next steps that are specific, verifiable, and assigned to a responsible party could make it easier to track progress over time. One program specialist said it would be great to use next steps for follow-up with the ability mark completed tasks.

Linking Materials and Resources

It is difficult and time consuming for anyone reviewing an activity to find related resources if they aren't attached or linked. Any materials used or referenced in the activity should be linked to the report.

More concise and action-oriented

Activity Reports are difficult to skim, there are a lot of words and it is difficult to know what information is the most important. More concise descriptions of actions and next steps would make it easier for program specialists to quickly understand and assess the situation.

The program specialists we spoke with suggested that the reports stick to facts and things reviewed, with fewer additional details.

Collaboration

Different people in the RO work with grantees in different ways and need a place for shared understanding. Program specialists work very closely with TAC (TA coordinator) referrals and plans go back and forth from TAC, PS, and TA managers. Because Program specialists don't operate in isolation a referral and reporting process to best serve their needs will also need to become a part of their collaborative workflow.

Combined Highlight results:

[color key.pdf](#)

[Activity Report NewGrantee.docx](#)

[Activity Report Transportation.docx](#)

[Activity Report Incident only 1 participant.docx](#)

Next Action

The insights from this exercise will inform the design of a new experience for TTA referrals and reporting. What we've learned through this exercise will also serve as the foundation of evaluating what data and information from TTA activities can be used to create aggregate views for regional and central offices.