Activity Report Timeline

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 experiment and prototype was designed to explore assertions about the wealth of information to be found in the Activity Reports. Through this experiment we hoped to learn more about:

1. The value of the Activity Reports to Program Specialists
2. How understanding past activities fits into their future decisions
3. Answer questions about the organization and the relative importance of information from the Activity Reports

Hypotheses

We tested two main hypotheses in this experiment, which were informed by research interviews to date.

User need 1: TTA Activity over time

TTA leaders have difficulty knowing what TTA activity a grantee has had over time

Hypothesis 1

We believe TTA Leaders will be able to make more informed decisions about grantee's TTA needs if they have a better understanding of a grantee's TTA activity over time.

We can help by presenting all TTA activity reports for a grantee in a timeline

We'll know we are right if the Regional Office can use knowledge of previous activity to make more informed decisions about future activities.

User need 2: Topical TTA over time

Regional Offices have difficulty knowing what TTA activity a grantee has had related to a specific topic or subject matter area.

Hypothesis 2

We believe When considering a particular topic or area of concern with a grantee, seeing previous TTA related to the topic will make it easier for RO to make decisions about future TTA.
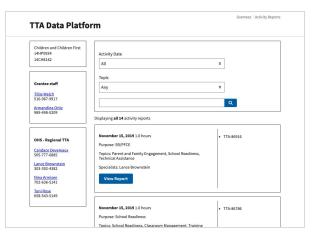
We can help by making it easier for regional offices to know what TTA has been happening for what purpose by filtering TA Activities by topic and subject.

We'll know we are right if the Regional Office CORs and Program Specialists can easily find relevant TTA Activities and can use knowledge of these previous activities to make more informed decisions about future activities.
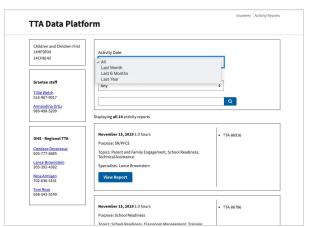
Details

We facilitated remote research sessions with four Regional Program Specialists, some of whom also operate as CORs. Following a series of background questions each Program Specialist used a prototyped page of a new interface displaying connected TA Activity Reports organized into a sequential feed. The
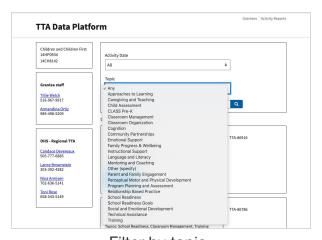
prototype also enables the user to be able to filter activities based on different topics, and timeframes.
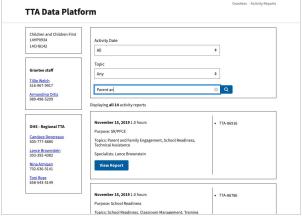

Prototype timeline view of grantee TTA activities
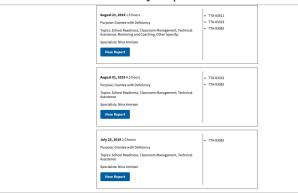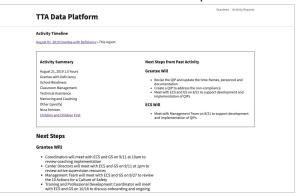

Filter by time period

Filter by topic

Search contents of reports

See linked follow-up activities

Scan Activity Report details

Observations and Insights

Objectives and outcomes are disconnected

TTA Requests initiate engagements and outline how TTA activities will respond to grantee needs. Intended objectives (or SMART tasks) and outcomes outlined in these requests are not typically reflected in the subsequent Activity Reports, but there is not a coordinated means of tracking how activities connect to the initial request. Program Specialists (PS) may refer to initial TTA requests when reviewing activities, but completion of activities is not tracked in a way that can be seen by Central Office (CO) or elsewhere in the system.

Monitoring and TTA Activities are disconnected

Because Grantee Specialists (GS) and Health Specialists are often deployed in response to monitoring findings it would be helpful for PS to see the related reports when justifying deployment and assessing activities.

Some PS currently attach the monitoring reports to the TA requests.

There is an opportunity to connect the need of TA with the activities.

Program Specialists rely on summaries of activities and rarely access full activity reports

GS and Early Childhood Specialists (ECS) provide executive summaries of activities to PS through email. This is in addition to filing the full Activity Reports.

PS often don't need a deep level of detail on each activity and don't have the time to search in HSES for the document and in the document for key points.

They rely on succinct summaries from specialists.

PS need signals to know when to pay closer attention to ECS

PS are only directly involved with ECs when there are problems.

CLASS scores may be a signal to dig deeper with ECS…

PS are often find it more useful to know the quantity of activities for a specific topic than the details of specific activities

The number of activities related to a specific topic/area of need is more important to a PS than the quality of any one activity.

Program Specialists need ways of knowing where to look for meaningful details.

The history of activities should be organized based on the issue they are in response too.

Validated Learning

Hypothesis - Timeline view

Our assumption that Program Specialists want to understand what TTA Activities a grantee has had over time was valid. However, the level of detail they need to know is not as we anticipated. Often the Program Specialists are more concerned with the quantity of activities on a specific topic over a period of time than the details of any one activity. A sequential view of TTA activities would be more valuable to Program Specialists if it organized based on the issue they are in response to.

Hypothesis - Topic Organization

It is important for Program Specialists to be able to sort activities by topic. However, the existing topics from Activity Reports - which reflect the Scopes of Work for each Reg. TTA Specialist - are insufficient for task management. They don't connect easily to TTA materials topics in ECLKC or with topics from Monitoring reports.

We could speculate, that with refinement, of the topics this method of sorting and organizing activities could be valuable for retrieval and for surfacing trends.

Technical Learning

Cloud.gov deployment went smoothly. We easily got user access to HSES to pull Excel data, but have not yet made progress on a programmatic connection to automatically pull the existing Activity Reports.

Next Actions

To make further progress on the hypotheses in this experiment we can:

Make TTA Activity easier to understand at a glance.

- Determine what content of Activity Reports is the most important to Program Specialists.

Identify what information could be surfaced for each grantee and regional overview of all grantee activities.
- Determine ways of highlighting trends and signals to help PSs know where to focus attention.

Make it easier to track completion and progress of TTA Activities

- Connect Initial TTA Request to completed tasks.
- Associate intended outcomes with Activity Topics
- Explore means of associating related activities to each other and to the issues and needs that triggered them.

Technical Actions

- Interoperate directly with HSES Activity Report data.
- Pull elements of Monitoring Status or Reports directly from ITAMS and/or HSES to give context to the timeline.