Supporting Healthy Marriage Toolkit

Resources for Program Operators
From the Supporting Healthy Marriage
Demonstration and Evaluation

May 2011

Acknowledgments

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INTRODUCTION
What is the Supporting Healthy Marriage Toolkit?

The Supporting Healthy Marriage (SHM) team consists of researchers, curriculum developers, and social service delivery professionals who were funded to research and oversee the development of community-based programs that provide relationship education to married parents. This Toolkit was developed by the SHM team to guide emerging SHM programs as they developed and implemented various aspects of the program design and research agenda — with the goal of helping program operators develop a strong, successful program. Our goal in providing this document for general use is that managers and staff of relationship and marriage education or other voluntary programs will benefit from the program design and management strategies used by SHM program operators.

The original intent of the Toolkit was to instruct SHM operators in developing programs that adhere to a common SHM model. Because the viability of the research required some uniformity across programs, this guide instructs program operators with some authority. However, in providing this document for general use, the SHM team is not asserting that these strategies will result in a successful marriage and relationship education program. Rather, the SHM team is providing strategies for consideration that may be useful to other program operators.

This Toolkit covers a variety of topics, and the appendixes offer sample tools that were developed for and by the SHM program operators. Some aspects of program design and the content of the sample tools were influenced by the research model and funding requirements. For example, sites were asked to recruit 800 couples in a 21-month period, which meant programs focused on developing a robust approach to recruitment and enrollment. Although future program operators may not face the same requirements for recruitment or participation, the guidance and strategies in this Toolkit are relevant to providers of voluntary marriage education programs, particularly for those interested in offering relationship education services to married parents. Future programs are likely to face many of the same challenges in recruiting couples to a voluntary program and keeping couples coming back over time.

There are three important program areas that this Toolkit does not address: budgeting, evaluation, and domestic violence. SHM programs operated under unique circumstances, so SHM budgeting and evaluation resources are less relevant to non-SHM program operators. To address domestic violence, SHM sites, like other federally funded healthy marriage programs, followed the guidance created by the National Resource Center on Domestic Violence in consultation with the Administration for Children and Families and the National Healthy Marriage Resource Center. These resources are available online and include a "Promoting Safety" resource packet (http://healthymarriageinfo.org/about/domesticviolence.cfm) and blueprint to guide the development of domestic violence protocols (http://healthymarriageinfo.org/docs/blueprintdvprotocolrev.pdf).

This Toolkit is divided into 12 sections, each focused on a specific aspect of program implementation or management. Although the Toolkit was not designed to be read "cover to cover," different parts of the Toolkit support and reinforce each other. Appendix A contains an acronym list that may be a useful resource as you review the following sections.

If you have questions about the material in this Toolkit, please contact Sharon Rowser, MDRC Vice President, Sharon.Rowser@mdrc.org.

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I. ABOUT THE SUPPORTING HEALTHY MARRIAGE PROJECT

The Supporting Healthy Marriage (SHM) project was designed to measure the effectiveness of programs that seek to improve relationship skills and maintain healthy marriages, and to inform program operators and policymakers about effective programmatic strategies. SHM is the first large-scale, multisite, multiyear, rigorous test of marriage education programs for low-income married couples with children. Supported by the Administration for Children and Families (ACF) within the U.S. Department of Health and Human Services (HHS), the project is motivated by research that indicates that children raised by both parents in low-conflict homes do better on a host of outcomes.

In 2003, ACF launched the SHM demonstration, as part of the Healthy Marriage Initiative. The SHM team includes the lead evaluator, MDRC, and its partners Abt Associates, Child Trends, Optimal Solutions Group, and Public Strategies, Inc. Eight SHM programs operated in 10 host agencies across the country.

Relationship and marriage education programs are designed to help couples develop skills in communication, conflict resolution, and supportiveness, toward the goal of improving relationship quality and increasing the likelihood that children grow up with both parents in a low-conflict home.

Marriage education is not counseling or therapy; it uses a structured curriculum taught in a group setting. The goal of these groups is to provide couples with the skills to communicate effectively and solve problems together, whatever those problems may be. Most relationship and marriage education programs also discuss qualities of a healthy marriage such as commitment, fidelity, realistic expectations, and romance.

Offering voluntary, preventive services to low-income couples requires some new thinking and training for social services providers. Providers have to consider the couple as one "service unit," as opposed to serving an individual. Services must be offered at a time when both members of a couple can attend, staff need to understand couple dynamics and how to support both members of the couple, and the program must be appealing enough that *both* fathers and mothers agree to come back for more.

SHM Programs

- University of Central Florida, Orlando, FL
- Catholic Charities, Wichita, KS
- University Behavioral Associates, Bronx, NY
- Public Strategies, Inc., Oklahoma City, OK
- Pennsylvania: Community Prevention Partnership of Berks County, Reading, PA, and Family Answers, Bethlehem, PA
- Texas: El Paso Center for Children, El Paso, TX, and Family Service Association, San Antonio, TX
- Becoming Parents Program, Seattle, WA
- Center for Human Services, Shoreline, WA

The SHM project is testing a year-long, intensive form of marriage education designed specifically for low-income families. SHM is a research-informed, skill-building program that operates in a performance-based environment. It is geared toward strengthening and improving marital relationships among low-income couples with children. SHM's main focus is on the couple relationship. The program is voluntary and is sensitive and responsive to the challenges and needs of couples from a variety of backgrounds.

The program model was designed to address particular challenges low-income couples face, teach and reinforce skills over an extended period of time to increase the likelihood of long-term behavior change, and engage both members of a couple. SHM programs consist of three mutually reinforcing components offered over a one-year period. Figure 1 illustrates the timing of SHM services.

- **Relationship and marriage education workshops**: The core SHM service, facilitated workshops, are conducted with three to 20 couples in a group setting, in weekly sessions lasting two to five hours each, typically over 10 to 15 weeks, for a total of 24 to 30 hours of curriculum. These workshops use structured curricula with core materials that have been field-tested over many years and have been recently adapted for low-income couples. All are designed to reinforce skills and teach concepts that basic research has found to be important in couple relationships, as well as to facilitate new insights into the couple's own relationship.

  SHM programs selected one of the following research-based marriage education curricula: Loving Couples Loving Children (LCLC), Within Our Reach (WOR), the Becoming Parents Program (BPP), or For Our Future, For Our Family (FOF).[1] Programs using BPP target expecting couples and new parents. See Appendix B for an overview of these four marriage and relationship curricula.

- **Family support services:** These one-on-one services are designed to facilitate couples' engagement and participation in the program for 12 months, link them to needed services, and reinforce the skills and principles of the core workshops over time.

- **Supplemental activities**: These events build on and complement the workshops, providing couples additional opportunities to learn and practice relationship skills and build social networks. Activities are offered throughout the length of the program and aim to reinforce relationship skills, provide a venue for couples to reinforce connections with other married couples from the program, and educate couples about common relationship stressors.

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[1]Loving Couples Loving Children (2009); Stanley and Markman (2008); Jordon, Stanley, and Markman (1999); Gordon, DeMaria, Haggerty, and Hayes (2007).

Figure 1: SHM Program Timeline

ENROLLMENT | MONTH 1 | MONTH 2 | MONTH 3 | MONTH 4 | MONTH 5 | MONTH 6 | MONTH 7 | MONTH 8 | MONTH 9 | MONTH 10 | MONTH 11 | MONTH 12

MARRIAGE EDUCATION GROUPS

FAMILY SUPPORT SERVICES
(to make referrals to other community-based services and do one-on-one coaching of relationship skills and problem solving)

SUPPLEMENTAL ACTIVITIES
(to reinforce curriculum concepts and encourage networking with other couples)

Services are offered over one year because research indicates that improving a marital relationship, which may involve changing behavior, habits, and assumptions, requires continued effort and practice over time. To encourage this, SHM couples are given multiple opportunities to review new relationship knowledge and apply it to their marriage. Each component (workshops, family support, and supplemental activities) is important to the SHM model. Program operators are encouraged to introduce all three program components to couples at the time of enrollment to ensure that couples view all three as central to the program.

II. GUIDING PRINCIPLES

Guiding principles provide a framework for how services are to be implemented and delivered. To guide program development, SHM used the following key principles.

- Design programs to meet the needs of couples, not individuals.
- Emphasize couples' strengths rather than their weaknesses.
- Ensure safety for individuals and for the couple in all aspects of the program.

These principles establish a framework through which the programs can deliver services that respect families and support their capacity to make positive changes to improve their lives and the lives of their children.

a. Design Programs to Meet the Needs of Couples, Not Individuals

High-quality SHM programs:

- **Demonstrate a strong belief that the quality of the relationship between mothers and fathers is critical to producing positive outcomes for children.** Parents who work well together communicate clear messages to children about expectations and behaviors. Programs clearly communicate that parents are children's first role models, setting examples about how two people who care about each other treat each other.

- **Are sensitive to the fact that roles within the couple and in the family differ across class, race, and ethnicity.** Staff demonstrate a commitment to understanding and respecting differences among participants and that all individuals have a right to make their own decisions and have their own beliefs. The program recognizes that parents may be reluctant to share their concerns about their children or parenting if they are worried that staff may be judgmental of their cultural beliefs. The program is committed to providing staff training to understand obstacles that low-income couples and families face, with particular attention to differences across ethnic, cultural, and racial lines. The program also pays special attention to immigrant parents, who may have particular concerns regarding their immigration status. Whenever possible, services are delivered by staff who reflect the cultural/ethnic background of participants and speak their primary language.

- **Organize logistics — like office hours and staffing — to serve the particular needs of couples, rather than individuals.** Agencies that have traditionally worked with individuals may find that this requires a different mindset. The program environment is welcoming for both men and women, and an extra effort is made to hire male staff. Programs take into account that one or both parents work outside the home and offer workshops and other services on evenings and weekends.

- **Are sensitive to the fact that low-income parents face barriers and challenges that middle- and upper-income parents do not.** The program understands that helping to stabilize economic conditions for low-income families is often a key step in supporting healthy relationships and healthy parenting. Staff are committed to offering services through referral to help parents meet basic needs, such as stabilizing housing and employment and obtaining food, health care, and affordable child care. Program staff encourage couples to work together to develop strategies for meeting basic needs.

b. Emphasize Couples' Strengths Rather than Weaknesses

In SHM programs, services are delivered from a couple-oriented model that values a collaborative and respectful relationship with the family. Services are delivered from a **strengths-based perspective** that assumes parents are competent and come to the program with knowledge and skills. A strengths-based approach recognizes the skills a spouse, parent, and couple bring to their family and seeks to build on those strengths. Some couples have never been asked "what works?" with regard to their relationship. Simply asking the question acknowledges that they are doing some things well and have a good foundation to build on.

This model aims to empower families and increase self-sufficiency to improve the family's capacity to solve problems on their own. In a strengths-based model, the agency culture and interactions with

participants are positive and supportive, not punitive. The table below provides a comparison between a strengths-based and a problem/deficit-based approach.

Strengths-Based Versus Problem/Deficit-Based Approach When a Couple Brings Up a Problem	
Strengths-Based	**Problem/Deficit-Based**
What works well in your relationship?	When did the problem start and how long has it been an issue?
Are there times when you see evidence that you are handling this problem well? How did you know it was going well?	Describe the problem. How has it developed over time?
How can you build on those successes? What is your vision of how things will look when this problem is solved?	To solve this problem, you should…

Assume that couples are capable of bringing about change in their lives and that all couples and parents can improve their skills, and set high expectations for all. Programs acknowledge that marriage and parenting are hard and that all couples and parents, regardless of race or income, can benefit from supports such as marriage education and parenting strategies to help them handle the challenging job of having a strong, happy marriage and raising happy, successful children.

Appreciate that men and women may have differing relationship needs and help couples look at these differences as assets in their relationship. Programs acknowledge that differing relationship needs may also play a key role in how men and women communicate with each other and parent their children. Hiring a male/female team to work with couples to model the importance of both members of the couple being involved in the program is strongly recommended. At a minimum, programs have at least one male staff member to help connect with the men.

Acknowledge that mothers and fathers may have different parenting styles and emphasize that these styles can be complementary rather than a source of conflict between parents. Additionally, in many families, extended family members, such as grandparents, play an important role in raising children. Managing different parenting styles and relationships can be complicated, but also enriching for both the couple and their children.

c. Make Safety for Individuals and for Couples Paramount Throughout the Program
SHM promotes safety and is not intended to keep couples in marriages that are not healthy. SHM programs are not designed to work with couples experiencing family violence. SHM programs have worked closely with national experts on domestic violence, as well as with their local domestic violence agencies, to develop protocols for working with and referring couples who might be experiencing domestic violence. Programs have written plans for how to provide a safe space for disclosures of domestic violence both prior to and once a family is enrolled. Staff are trained in how to handle disclosures, and local domestic violence agencies are involved in staff training. For more information see the "Promoting Safety" resource packet (http://healthymarriageinfo.org/about/domesticviolence.cfm) and "Blueprint to Guide Development of Domestic Violence Protocols" (http://healthymarriageinfo. org/docs/blueprintdvprotocolrev.pdf).

Take confidentiality seriously and have measures in place to protect participants' information. Staff are trained in the importance of confidentiality and respecting the privacy of their clients. Staff adhere to a "need to know" policy, asking only for information that is directly relevant to the assistance a couple needs. Programs develop release of information documents to inform couples how their information will be used and by whom. Staff also inform participants from the outset about the program's confidentiality policy, including their professional and ethical responsibilities to report child abuse and neglect.

Maintain clear professional boundaries with couples. Marriage education, although it is not counseling or therapy, can bring serious issues in a couple's relationship to the forefront. Participants may shed tears during a workshop and deeply hidden issues may surface. To help staff work with couples effectively and appropriately, staff training on the importance of professional boundaries/ethics is provided. This training is particularly important when staff are former clients or are members of the same community in which the clients live and to ensure that staff members' feelings about problems in their own relationships do not emerge in their work with couples.

III. RELATIONSHIP AND MARRIAGE EDUCATION WORKSHOPS

As soon as possible after couples enroll in the program, SHM programs assign them to weekly relationship and marriage education workshops, which are the core of the program. These workshops use structured curricula with core materials that have been field-tested over many years and have recently been adapted for low-income couples. The curricula content, language, and teaching methods have often been modified to be more interactive and culturally competent than previous versions of the curricula. All are designed to teach skills and concepts that basic research has found to be important in couple relationships, as well as facilitate new insights into the couple's own relationship.

The typical SHM couple starts a workshop about five weeks after enrolling in SHM and ends it about three and a half months later. The average workshop aims to include 10 to 12 couples, although the size can vary from as few as three couples to as many as 12 or 20. After starting a workshop series, a couple is encouraged by program staff to continue in the same series; staying with the same group of couples over time is particularly important when the program's curriculum includes a significant amount of group discussion and interaction. Building trust among group members and with facilitators, sharing ideas across couples, peer-to-peer learning, and encouraging connections are central to the workshop experience. Because curriculum skills and knowledge are cumulative, programs should make sure that couples attend as many of the workshop sessions as possible. Make-up workshops can be offered when couples miss a group session.

a. Marriage Education Curricula

SHM programs used one of four marriage education curricula that have been adapted for low-income couples: Loving Couples Loving Children (LCLC), Within Our Reach (WOR), the Becoming Parents Program (BPP), or For Our Future, For Our Family (FOF).[2] See Appendix B for descriptions of these curricula. These curricula showed promise in prior research and have been used previously with married couples. They all include topics relevant to low-income married couples, such as:

- Understanding marriage (realistic expectations of marriage, long-term commitment, trust)
- Managing conflict (communication, conflict resolution, problem-solving)

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[2]Loving Couples Loving Children (2009); Stanley and Markman (2008); Jordon, Stanley, and Markman (1999); Gordon, DeMaria, Haggerty, and Hayes (2007).

- Promoting positive connections between spouses (emotional connection, friendship, intimacy)
- Strengthening relationships beyond the couple (support networks, extended family relationships)
- Coping with circumstances outside the couple relationship (such as understanding how individual upbringing affects relationships or addressing joint challenges such as financial stress)

Many curricula also address parenting issues, such as child development, discipline, and parenting as a team.

Considerations in choosing a marriage education curriculum
While all SHM curricula include a common set of topics, their approach to teaching those topics can vary. Below are questions to keep in mind when selecting a curriculum:

- How much time does the curriculum devote to group discussion, lessons taught by facilitators, individual couple activities, videos, role playing, group activities, and facilitator demonstrations of skills?
- Of those learning approaches, which do you think will appeal most to couples you plan to enroll?
- Which approaches fit in best with your agency's culture and the strengths of your staff?
- What core relationship topics does the curriculum focus on? Are these the topics that you feel are most relevant to couples you plan to serve?
- Is the curriculum available in a language that is appropriate for your target population?
- Is the content (such as examples used) appropriate for and relevant to the cultural groups you will be serving?

Training requirements, cost, and availability of curriculum training are other issues to consider when selecting a curriculum.

b. *Workshop Logistics and Preparation*
SHM programs organize the delivery of their marriage education curriculum to create a program that is as accessible as possible and will keep couples coming back. In doing this, programs make logistical decisions about scheduling workshops, offering make-up sessions, setting up for a workshop, and providing transportation and child care. Programs can design ways to collect feedback from staff and participants to ensure that the program continues to improve at meeting couples' needs.

Scheduling Workshops
Workshops should be scheduled to support participation, making it as easy as possible for couples to attend and to make up sessions. Couples are more likely to attend workshops if their first session occurs soon after they have enrolled, while they are still thinking about the program. This means that recruitment efforts need to be coordinated with workshop start dates so that slots can be filled quickly. Programs must also make sure to have sufficient staff and program space to accommodate the workshop schedules, paying particular attention to the level of staffing needed when marriage education groups overlap.

Structuring Workshops
The timing and frequency of beginning workshops depend on space available, the number of couples served, curriculum duration, and staffing. Appendix C provides a sample schedule for an evening

workshop. The following are issues to consider in making decisions about the length and structure of workshops:

- The number of hours of workshop time necessary for your curriculum.
- The length of each workshop session: Will sessions vary in length or begin with a longer first session? Some programs choose to have the first longer workshop session on a weekend day so that participants are immediately introduced to the core components of the curriculum, followed by weekly evening sessions that last two to three hours.
- Will each workshop begin with a preworkshop gathering or a meal? How will this affect the timing of workshops? You may want to budget 30 to 45 minutes for couples to sign in, eat, and mingle with other participants.
- How many weeks will it take each group to cycle through all sessions in the core curriculum?
- How often will a new series of workshops begin? Will your program offer multiple workshops simultaneously?
- How often will workshops meet — weekly, biweekly? Will sessions occur on weekdays, weeknights, weekends, or a combination?
- How is your staffing pattern for both workshops and family support reflective of your workshop schedules?
- How many couples do you need to recruit to start a workshop?

When creating recruitment goals that coordinate with workshop start dates, it is important to keep in mind that some recruited couples will not show up for their first scheduled session. Programs can expect about 70 percent of recruited couples to show up for the first workshop. This means that if the goal is to have 10 couples in a workshop, programs should plan to recruit 12 to 14 couples per group.

Creating a Workshop Schedule
It will be helpful to create a workshop schedule for an entire year. Some dates will have to be revised throughout the year as programs try to accommodate the preferences of participants, but planning is crucial in determining your recruitment goals and staffing needs for the year. While it is important to maintain some flexibility in workshop scheduling, it will not be possible to accommodate the scheduling preferences of all participants. Think about setting firm dates for workshops, while giving participants options for attending workshops at times that they find convenient.

In creating a program calendar, think about specific periods of time when workshops may be difficult to schedule. For example, it is not ideal to start a workshop group during the holiday season. Also consider dates specific to your communities, like important local holidays or times of increased work responsibilities that might be problematic.

Scheduling Make-Up Sessions
Because most couples will miss some workshops, your program should develop a protocol for making up lessons that allows couples to learn as much of the curricula as possible. For example, couples who miss a session with their group can arrange to attend the same session with another group at any time it is offered. Programs that have fewer workshops running simultaneously should think about other ways participants can access the topics covered in missed sessions. For example, if there is a day when many participants have missed a workshop, it might be possible to schedule a group make-up session. Your program could also provide the option of one-on-one sessions.

While couples should have the opportunity to make up lessons, your program should have reasonable expectations about the number of sessions couples will attend. Even with the opportunity to attend a make-up session, few couples will have 100 percent attendance. It will be impossible to make sure every couple attends every session, but there may be fundamental aspects of the curriculum that are essential for couples to learn to gain the most from the workshop material. Your program could create a list of these key sessions and focus on making sure that, at a minimum, all couples attend these. This strategy may be particularly important if your program offers a longer first session that provides the foundation for subsequent workshops.

Setting Expectations for Workshop Facilitators

It can be helpful to create guidelines for workshop facilitators to clarify program expectations for workshop content, quality, and the experience couples have in the program. Programs should consider the following issues when creating their guidelines for facilitators:

- Facilitators are responsible for working with family support staff to engage couples in the workshop and encourage their attendance at all sessions.
- Facilitators will need to schedule time before each workshop to prepare for the upcoming session. Be clear with facilitators about how much preparation time you are expecting from them throughout the week and provide support in preparing for workshops.
- On the day of the workshop, they should arrive at least one-half hour before the workshop to set up. Outline specific tasks they are expected to do, and what tasks may be assigned to other staff (such as, setting up chairs or media equipment, preparing or serving food, greeting couples as they arrive, or distributing transportation assistance or incentives).
- Successful facilitators can develop a relationship with couples by spending time with them before and after the workshop. Programs should play an active role in facilitating these relationships and ensure that sufficient time is allotted in the facilitator's profile.
- If facilitators are responsible for distributing participation supports or incentives to participants, they should know what participation supports and incentives to distribute and how to do this (discussed below).

In SHM programs, multiple staff members work with each couple and are jointly responsible for their engagement in the program (see Section X for more information on the staffing structure for SHM programs). For this reason, it is important to structure your program to encourage communication between workshop facilitators and other staff. This may be accomplished through written communication or all-staff meetings. If facilitators are not full-time employees, it can be difficult for them to participate in staff meetings.

Workshop Preparation and Follow-up

Think about the time it takes to physically set up a room, prepare a snack or meal, and greet participants. The following is a list of preworkshop tasks programs should consider:

- Call/e-mail/text couples to remind them of the workshop time and date and confirm their attendance.
- Review previous week's attendance, discuss any absences with family support staff, and strategize about ways to reengage those couples.
- Set up food and utensils for a meal or snack and clean up after meal
- Prepare sign-in sheet and name tags for couples.
- Prepare participant supports or incentives. See section IX for more information about participation supports and incentives.

- Prepare workshop room with any equipment necessary (handouts and materials, projector, video equipment, chalk, paper and pens, and feedback forms).
- Greet participants.

Workshop facilitators may not have the time to coordinate all of these logistics on their own. One strategy for providing support is to hire part-time workshop hosts, paid an hourly wage, to take care of some workshop logistics, such as setting up and serving meals, greeting couples, making sure they sign in, and handing out name tags. Hosts are ideally couples who have been through the program. They welcome participants to the workshop and mingle with couples before and after the group session. Some programs might use workshop hosts in marriage education groups to assist facilitators, since couples will benefit from talking with hosts about their experience in the program. Hiring "graduated" couples as program hosts is also a great way to keep them involved in SHM. Both members of a couple might host a workshop or they might alternate each week.

Facilitators might be expected to stay after the workshop to complete a write-up of particular achievements or challenges of the session. Facilitators could enter these write-ups into the data system, where they would be accessible to program staff, or may use paper forms to communicate this information to the Family Support Coordinators. Facilitators should know what type of event or information from a workshop is useful and important to report to program staff.

c. *Quality Control*

Implementing methods to ensure the quality of workshops and monitor areas for improvement can help project managers deliver the best program possible. While the content and structure of quality control and evaluation procedures will vary by curriculum and program, the following are some practical examples:

- Curriculum quality control checklist: One facilitator in each session makes sure all important points of each session are covered, using a checklist. While one facilitator is speaking, the other has the list and can cover anything the other workshop leader missed. Talk to your curriculum developer about creating a checklist for each session.

- Couple feedback: Couples fill out a feedback form after every session asking how helpful they found the information provided, how useful they found the format and teaching methods, and how they felt about the facilitator and other group members. This lets the program know which aspects of the workshops are working well and which aspects might need to be rethought or presented differently. It also helps monitor the quality of facilitation and group connection. Appendix D provides an example of a workshop participant feedback form.

- Workshop audits: A program manager or curriculum expert might sit in on one or two sessions for each workshop facilitator to determine whether or not the curriculum is being taught effectively. Facilitators will get feedback on their style, workshop atmosphere, couple retention rate, and couple engagement.

- Facilitator debriefing sessions: After training and particular sessions, the facilitator meets with the program manager to go over particular challenges and ideas.

- Self-evaluations: Facilitators should reflect on what their strengths are and identify areas where they can improve. These evaluations might be used in monthly meetings with program managers to talk through how the program can support facilitators in overcoming challenges.

IV. FAMILY SUPPORT

The family support component provides one-on-one coaching and resources to couples from a strengths-based perspective. The three primary goals of family support are to:

1. Promote engagement and participation in the program for 12 months by maintaining steady contact with couples, encouraging marriage education and supplemental activity attendance, and by administering participation supports (such as transportation or child care reimbursement).
2. Link couples to outside services that go beyond the program's offerings, such as mental health counseling or employment services, to mitigate challenges faced by couples.
3. Reinforce the skills and principles of the core workshops over time, through regular meetings with individual couples.

Although family support varies somewhat by program, in order to meet the goals of the SHM project, program administrators should ask themselves if their family support model:
- Operates from a strengths-based, couple-oriented perspective
- Supports and encourages couple autonomy
- Lends itself to responding to families in a timely way
- Ensures the emotional and physical safety of program participants
- Allows the program to meet the needs of the growing number of families it will serve over time
- Provides a feedback loop to administration and other program staff regarding successes and challenges couples are facing, so that staff can coordinate their response and ensure that families get the services and support they need

Family support staff, called Family Support Coordinators (FSCs) in SHM, help couples apply new skills, navigate challenges, and celebrate successes. FSCs are intended to be the "glue" that keeps couples connected to the program. An FSC works to actively engage couples in the program — from the moment enrollment is completed, their job is to connect with couples and develop a supportive relationship and maintain that connection throughout the 12 months SHM programs seek to keep couples engaged. While other staff may also make contact with couples, once enrollment is completed, the FSC serves as couples' main point of contact with the program and has primary responsibility for ensuring there is consistent contact between the program and families, by phone, mail, e-mail, or home visits. The contact is proactive, meaning that the FSC does not wait for the couple to get in touch with a problem or need. Rather, the FSC makes regular phone calls to couples on his or her caseload to check in and ask what the program can do to help.

A popular adage among social services programs is that "people connect with *people*, not *programs*." Interpersonal connections go a long way to keep couples engaged in services. In SHM, all staff have a responsibility for making connections with couples and contributing to an atmosphere that is supportive, inviting, and responsive to their needs. However, the FSC plays an especially important role in creating and maintaining these connections.

Each FSC is assigned a caseload of couples and takes responsibility for maintaining contact with these couples, identifying their strengths and challenges and working to keep them engaged in the program. FSCs help remove barriers that may make it hard for couples to participate in SHM activities. For example, they can provide transportation assistance or a child care voucher and address larger challenges like housing instability or unemployment. They also link couples to community resources by making referrals and finding other available supports. They keep a full and updated resource list at their fingertips, maintain connections with area social services agencies, and can explain in detail these organizations' processes for offering assistance — or at the least, have a phone number to call to help a couple find out this information. The FSC keeps detailed records of client contacts and the types of barriers to program participation the couples are facing. These findings are routinely communicated by the FSC to management. FSCs are typically trained in the program's marriage education curriculum and should attend enough workshops to understand the skills taught and how to apply them. Curriculum reinforcement and skill-building is a unique aspect of the FSC's role in SHM.

a. Structuring Family Support Visits

Family support can be administered through office-based or home-based visits. It is essential that family support includes both members of the couple and focuses on the couple as the service unit. SHM programs should create specific protocols for family support meetings. Each couple and each visit will be different, and FSCs must be responsive to the needs and requests of couples. Family support protocols will therefore be flexible, but are intended to provide some structure to meetings, ensure that FSCs cover key items, and make FSC visits as substantive and productive as possible. The objective of the protocol is to ensure that all three FSC goals are addressed at each meeting — promoting engagement and participation in the program, connecting couples to supportive services, and reinforcing curriculum skills. Each family support visit is expected to last at least an hour. Key goals and components of family support visits include:

- Build rapport with couples, convey respect, and establish an understanding of how the FSC and couple will work together.
- Conduct assessments, screenings, and interviews, which may include content on mental health, substance abuse, and domestic violence.
- Track participation and encourage couples to attend workshops and supplemental activities.
- Identify family strengths and recognize natural support systems to assist families in need. Coach and empower families to understand and develop skills to manage their own relationships.
- Identify family challenges or challenges to participation and refer to other supportive services.
- Follow up on challenges raised and referrals provided at previous meetings.
- Model and reinforce themes, lessons, and skills presented in the marriage education curriculum.
- Explore couples' issues and concerns, using the curriculum tools and family support protocols.
- Partner with families to determine how, when, and why transitions from various levels of case management services should occur based on identified milestones.
- Establish a time for the next visit.

Two sample family support visit protocols can be found in Appendix E.

b. Family Support Tools

Programs are encouraged to develop or use tools to help FSCs facilitate work with couples. Books on marriage/couples/relationships often have passages, quizzes, or activities that can serve as discussion starters. Some relationship and marriage curriculum developers have created homework or additional

activities to enhance the curriculum. Examples of marriage education activities FSCs can use to reinforce relationship skills and concepts from the core curricula are found in Appendix F.

Another option is to introduce a marital inventory such as ENRICH and FOCCUS/REFOCCUS as a tool for FSCs working with couples.[3] Marital inventories identify strengths and growth areas in the marriage, whereas personality tools identify personality traits that commonly affect one's relationships. In most cases (depending on the tool you select), FSCs will need to participate in a training session to learn to work with couples one-on-one to interpret their results. Inventories are typically delivered over multiple sessions so that couples can complete the tool in one session and receive feedback in a later session.

When administered correctly, marital/personality inventories can create an environment for growth for individuals and couples. These tools require individuals to perform a self-assessment by independently completing a questionnaire. They are then scored, and personality traits or relationship tendencies are characterized. Discussions should be led by a trained FSC to talk about how different personality types tend to interact and pitfalls to be wary of. (Note: While marital inventories are well researched, there is no research on how personality assessment tools impact the dynamics of couple relationships.)

Other activities that FSCs can use include written materials or DVDs that can be shared with couples. They are a great way to further engage couples and pass on additional helpful information about relationships and families. Some ideas for written materials include:
- Books or videos about marriage or couple relationships that couples check out and discuss with their FSC
- Creating a video library for couples to check out content-appropriate date movies
- Tips on how to keep your relationship strong and tip sheets that deal with common, stressful situations (see www.healthymarriageinfo.org; go to NHMRC products, tip sheets, for couples)
- Activity sheets that couples can work through together to continue their skills development

c. Managing Family Support Coordinator Workload

Budget limitations will mean that program managers and FSCs will have to make decisions about how intensive their work with couples is over time. Managers will need to articulate a family support strategy for their FSCs that helps ensure that FSCs know how to balance the number of couples they serve with providing a level of service that best meets couples' needs, in a way that stays within the program's budget. Programs can assume that for many couples, family support needs will be heaviest in the early stages after enrollment and decline over time. Other couples may need more intensive assistance for many months. Still other couples may enter the program with minimal needs. Programs can think about developing a "leveling system" to organize caseloads based on need/time in the program. "Leveling" refers to a method for classifying couples according to their level of need for family support services — a kind of triage — and then sets out goals for the number and types of contacts FSCs should expect to make with couples in each level. Your program should develop tools that FSCs can use to assess the level of families' need at various points in time, and family support supervisors should play a role in assessing level of need. These allow FSCs to effectively manage the number of couples served, while focusing on couples with the highest level of need. Two examples of leveling system guidelines are provided in Appendix G.

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[3] Olson and Olson (1999); Williams and Jurich (2007).

V. SUPPLEMENTAL MARRIAGE EDUCATION ACTIVITIES

Supplemental activities are educational and social events that complement the core workshops. These activities are designed to keep couples engaged in the program, reinforce relationship skills, continue providing links to community resources, and encourage couples to form and solidify support networks of married couples from the program. Supplemental activities can be both educational activities similar in format to the marriage education workshops or more social in nature and aimed to promote connections between spouses or among couples in the program or provide a fun opportunity to reinforce the curriculum.

Program operators offer supplemental activities a few times per month on weeknights or weekends, when couples are likely to be most available. Couples can be invited to supplemental activities at any point in the program year. Programs might invite couples to these activities early on, when they are waiting for their group workshop to start, to help maintain their initial interest in the program, or while they are attending workshops, to create a bridge between the workshops and the supplemental activities. However, couples may be more likely to attend once they have finished their workshops so that the two components are not competing for their time.

Couples' participation in supplemental marriage activities is an equally important portion of SHM programs; they are a key, *ongoing* program component. Programs should consider participation in supplemental marriage education activities as part of what is required to complete the program. Participants should perceive the three program components as a **seamless offering of activities.** That is, when they enter the program, they should understand that they will attend marriage education workshops, meet with an FSC, and attend supplemental activities.

a. Planning Supplemental Activities

Programs are encouraged to be creative in developing a varied menu of activities that meet the needs of their participants — both in the topics of activities offered and the schedule and timing of activities.

Types of Supplemental Activities

Supplemental activities cover a wide range of topics. Though some do not explicitly center on curriculum themes, programs are expected to include marriage and relationship education content in all activities. Supplemental activities can be grouped into four activity types, based on their content and primary focus: Booster sessions, other educational presentations, curriculum refreshers, and program-wide events.

Educational Activities:
- *Booster sessions* are similar in format to the program's core workshops and use core curriculum concepts but introduce new relationship-related material. Examples might include strengthening relationships in stepfamilies, co-parenting, or using new communication skills to discuss the balance between work and family.
- *Other educational presentations* provide resource information to help couples address relationship stressors and/or learn new skills. Examples include sessions on financial planning, budgeting, accessing the Earned Income Tax Credit, or child development and baby care workshops.

Social learning and connection-building activities:

- *Curriculum refreshers* can be integrated with social activities. One example is a "date night" series in which couples come to the program for a short session on a relationship topic led by staff, then go out on a date, to reinforce the importance of spending time together as a couple.
- *Program-wide events* for couples or families are more social than educational, such as a potluck dinner or movie night for the whole family, aimed at helping spouses connect with each other as a couple or build positive social networks with other couples, families, and program staff.

Scheduling and Promoting Activities

Key points to consider in planning supplemental marriage education activities include:

- Program managers need to consider supplemental marriage education activities as an integral part of their SHM program. A target number of hours or activities per month should be set as an expectation of program participation.
- Activities should reinforce curriculum lessons and engage couples.
- Program staff should encourage participation in supplemental activities by promoting events, encouraging and confirming attendance, and following up with couples who are unable to attend.
- Services should be monitored and evaluated by program managers in order to revise and improve plans for future activities.

During the planning phase, programs should consider how and when they will offer supplemental marriage education activities. Frequency and consistency will be important factors to consider when planning supplemental activities, keeping in mind that if your goal is to get every couple into at least one activity per month, there must be multiple offerings to choose from.

Programs should offer a mix of supplemental marriage education opportunities that may be delivered on a weekend, weekday evening, or during the day. A schedule of activities should be developed and distributed to couples at the beginning of each month. For example, there may be a two-hour workshop offered the first Thursday evening of each month, with a rotating list of topics relevant to the target population (such as financial planning, family literacy, résumé writing, co-parenting, and step-parenting). The times and locations of these programs must be available far enough in advance for couples to manage work schedules, child care, and transportation. If a program requires couples to participate in at least one activity per month, a variety of topics should be covered. Similarly, topics that are well received and popular should be repeated throughout the year for new program enrollees.

Program staff (especially FSCs and workshop facilitators) need to be aware of all ongoing activities in order to promote them and encourage couples' participation. During recruitment, intake workers can tell couples about the many activities the program offers and **set participation expectations**. Throughout a couple's engagement in the program, they should be reminded of supplemental marriage education offerings, and the program staff should follow up with those couples who do not attend. Finally, completing a marriage education curriculum is a wonderful accomplishment for couples. However, it should not be misconstrued as *program graduation*. *Programs that celebrate when couples "complete" the curriculum must be cautious so that participants do not feel as though they are "done" with the program.*

One of the greatest challenges to providing a myriad of ongoing activities is **tracking participation**. A data management system can be useful in recording participation at supplemental activities, along with details of the activities, such as the amount of time spent, location, and marriage education topics

reinforced. Program staff will need to be trained on how to record participation, and you will need to designate staff to record participation in supplemental activities.

b. Using Supplemental Activities to Encourage Program Engagement

To engage couples in supplemental marriage education, programs should offer a variety of activities throughout the course of the program. The examples below suggest strategies for engaging couples in supplemental activities at particular points in the program through the FSC and by soliciting the input of couples.

Before starting workshops: Supplemental activities are a great way to engage couples in your program right away. If you do not have a marriage education workshop beginning for two or three weeks, but you have a couple who has just enrolled in the program, you can engage them immediately by inviting them to the next supplemental activity. Programs may decide that some activities are more beneficial for couples once they have begun or completed the core curriculum, but in general, this provides couples with an opportunity to meet program staff and other program participants, get a taste of the great information the program has to offer, and have fun — all of which will encourage their retention in the program.

Concurrent with workshop offerings: Curriculum lessons can be reinforced through supplemental educational activities. For example, if the curriculum lesson is on using statements to tell your spouse what you want, couples can practice this skill by talking about what supplemental marriage education activity they would like to participate in, given the upcoming options. If there is a family picnic on a Saturday afternoon and a financial skills seminar on a Wednesday evening, one spouse could practice explaining to his or her spouse why he or she would prefer to attend one activity rather than another. Marriage education workshop leaders can remind couples of upcoming activities, circulate sign-up sheets, or integrate stories about past events into the curriculum sessions. Group leaders can be very influential with program participants and should use their "podium" to encourage participation in supplemental activities.

After completing workshops: Ongoing marriage education activities can be used to keep couples who have completed a workshop series engaged for the full year of the program. Once couples complete the core marriage education curriculum, they may feel that they have "completed" the program. These activities can be advertised as a way to learn additional skills, practice their marriage education skills, reconnect with other couples, get in touch with program staff, or just enjoy spending time together as a couple. Offering a variety of activities will help the program to appeal to the couple "where they are," based on their needs and what is attractive to them.

Working with FSCs: FSCs can encourage couples to attend the supplemental activities that are most relevant to them. If the couple could benefit from career enhancement services, literacy programs, or attending a session on parenting techniques, the FSC can recommend these activities. If the couple lacks social supports, the FSC could recommend social activities to provide an opportunity to make friends with other parents.

FSCs should be trained to help couples be aware of, sign up for, and access supplemental education offerings. They should always have event flyers and/or sign-up sheets handy. Further, they should help couples arrange transportation or child care so that they can participate in these programs, as they may be offered in the community outside of the program space. FSCs should also call couples to remind them of upcoming events, send monthly calendars to families, or call after an event to tell the couple that

they were missed but that there is another activity coming up. Making these events more personal can help keep couples engaged in the program.

Couple-driven activities: To keep couples engaged, seek their input on workshop topics or activities that interest them. Take advantage of community activities, seek community donations, and use them as an opportunity to discuss and reinforce curriculum themes, such as spending time as a family. Give couples an opportunity to tell you what they would like to attend or to plan an activity or outing to keep them engaged in the program. You may be able to have couples take part in the planning process. They may want to contribute to a potluck meal or plan an outing for the group. Encouraging couples to participate in the planning process improves "buy-in" and can help retain them in the program.

Evaluate supplemental marriage education activities just as you evaluate workshops. Program managers should identify popular topics and events that couples want to participate in as well as change the schedule to respond to changes in demand. Managers should also observe activities periodically to ensure that quality services are provided and offer feedback to staff. There is flexibility in planning ongoing marriage education activities, and programs should be willing to change workshop topics or activities based on couples' feedback.

c. Implementing Educational Activities

Educational activities provide an opportunity to deliver helpful information to couples beyond the core marriage education component. Educational activities can be shared in a fun way, through mentors, seminars, or workshops, supplemental curriculum pieces delivered by SHM staff, or individual learning opportunities that teach couples about themselves.

Booster sessions (Curriculum-based workshops) are designed to build on the core curriculum principles while teaching new skills or reinforcing previously taught skills. Booster sessions may be the same length as other curriculum sessions or longer, such as an all-day Saturday session. Boosters can be intensive workshops that cover difficult issues by building on skills taught in the core curriculum. For example, if the core curriculum teaches a communication skill, the booster session may use that skill and apply it to potentially sensitive issues related to parenting, finances, or dealing with stress. Some curricula offer ongoing sessions that are not part of the core SHM curriculum.

Offering incentives for attendance at booster sessions can enhance participation. Incentives can be small and should relate to the particular topic that is covered in the session. For example, programs may offer a booster session about stress management and give each participant a colorful stress/squeeze ball. A financial management session might include a small calculator for each couple to help them track their finances. Although these incentives are small, they add a fun element to the lesson and give couples something to look forward to at subsequent sessions.

Other educational presentations should include topics of interest to your target population. For example, if you are recruiting couples for SHM who are primarily parents of toddlers, your target population may be interested in a safety workshop about baby-proofing your home, basic child CPR, and talking to your children about staying safe. Seminars or workshops could be geared toward the couple, and if a new presenter is used to teach the topic, SHM program staff should be there to introduce the speaker, connect couples to additional resources, and help draw connections between the topic covered and lessons taught in the core marriage education curriculum. Possible educational topics may include, but are not limited to:
- Financial literacy, money management, debt reduction, or credit counseling

- Parenting skills (for parents of infants through teens)
- Helping with homework (for parents of school-aged children)
- Co-parenting (for parents who have a child by a previous partner)
- Stepparenting (for couples with blended families)
- Career supports (such as résumé writing, interviewing, or job search)
- Educational supports (such as General Educational Development or English as a Second Language classes, preparing for college, or entering a vocational program)
- CPR and/or Family Safety Classes
- Job search skills/career development
- Health and mental health workshops
- Stress management/relaxation
- Cooking classes/nutrition

d. Creating Fun Events to Strengthen Couple, Family, and Group Connections

Couples may bond in the workshops and begin to develop friendships and support systems with other couples in the program. Activities that encourage social time as well as provide learning opportunities can help to foster these relationships or can help spouses reconnect with each other as a couple.

Remember that activities intended to be "fun" should also be educational. Programs should make sure that the goal of every activity is to help couples learn. Facilitators should connect all activities to curriculum topics and take advantage of teachable moments to reinforce skills from previous lessons and help couples in their application of the skills. Activities may be couple-centered, family-centered (to include children and/or extended family members), or gender-based (such as dads' groups).

Programs can encourage couples to participate by planning activities in locations that couples can get to easily. Further, cost may be a barrier to participation; therefore, programs should strive to cover all of the expense for couples' participation.

Curriculum refresher date nights are an opportunity for couples to connect with each other. Most marriage education curricula encourage couples to spend time together alone to keep the fun, friendship, and intimacy in their relationship alive. Date nights are times when a couple can go out (or stay in) and leave the business of running a family behind.

Programs can also encourage group date nights, where one or several couples get together. This can be supported by offering child care on a Friday or Saturday night or giving away gift certificates or coupons for activities like bowling, movies, or fun centers, which you may be able to have donated to your program. Programs should plan a group activity to help the couples focus on a curriculum theme and can provide an activity focused on their relationship for couples to discuss and complete on their date. SHM programs used activities from their workshop curriculum or other sources, for example, selected lessons from the 10 Great Dates curriculum,[4] to reinforce relationship and marriage skills during date nights. The event is something couples can look forward to and can build excitement and serve as a source of encouragement.

Programs can partner with area businesses to provide gift certificates for couples to enjoy a date night. Date nights can be supported by playing a movie, serving popcorn, and offering on-site child care.

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[4]Arp and Arp (1997).

Another way for programs to encourage date nights is to have FSCs work with couples to brainstorm "free" dates, such as hosting a game night for some friends, having a picnic, or taking a walk on a local nature trail. Working with couples to come up with a list of "free" dates will make their planning process easier.

Program-wide events such as *family events* that include children or extended family can be an important part of the SHM program. As couples develop relationships with other couples, they may be eager to introduce their family to their new friends. This may be especially relevant in some cultures/communities where the family takes priority over the couple relationship. Programs could host a potluck dinner, and couples could bring their children or other family members. Programs can think about creative ways to reinforce curriculum themes at these events, such as asking families to complete a curriculum activity where they discuss what they value about each other and playing "marriage education bingo." These activities might be followed by dinner or dancing. The presence of program staff, including FSCs, can provide an opportunity for couples and staff to interact in an informal setting and share parts of their lives with one another, along with enjoying a great meal together.

Programs can also serve families by hosting a meal for the entire family and then delivering adult-based programs in one room and child-focused activities in another room. That way parents are not leaving their children and everyone can enjoy time together followed by a skill-building activity.

Seasonal activities can be planned so that events occur annually and can be attended by any SHM program participant. These might be larger events that cater to 100 people or more. They appeal to couples because of the relevance of the seasonal activity and because couples know that this is a one-time event and the service/event will not be offered again while they are enrolled in the program. Possible seasonal activities include:

- Spring: EITC/tax support workshops or events where community volunteers help SHM families complete their taxes
- Summer: anniversary celebration or a family picnic to bring families together to acknowledge their commitment
- Fall: back-to-school activities to help parents prepare their children for school or a Thanksgiving event to give thanks for their marriage and family
- Winter: Valentine's Day banquet to celebrate love or a holiday celebration to share traditions and customs

Activities for specific groups of couples (such as women, men, expectant couples, adoptive couples, first-time parents, or parents of teens) may further help the program foster social supports for SHM families. For example, parents of infants may be grappling with difficult issues, such as who will care for the baby, how to manage unsolicited advice from family, or in what religion to raise the child. Creating support groups, information sheets, or other resources for targeted couples can provide help that builds on the skills taught in the core curriculum and applies them to address particular issues.

Gender-specific activities can be a great way to encourage connections among moms and dads and can be especially important to engage and retain men in the program. SHM is designed for couples, but men may be harder to engage and may not have participated in other programs. Therefore, creating specific groups around men's and fatherhood issues can give them a sense of belonging that is integral to their participation.

Activities for men might include:
- Meeting for breakfast monthly to discuss men's and fatherhood issues
- Participating in a local sports league or watching a sporting event together
- Work days, where men assemble to help one another with projects such as remodeling, small repairs, and landscaping

Activities for women might include:
- Motherhood discussion groups
- Gift-wrapping during the holidays or delivering gifts for local charities
- Exercise-related activities, such as walking at a park or an exercise class

Other gender-specific activities may be designed for moms and dads, particularly if their children are close in age. Parenting can be a strong common bond among men and women and offers a range of topics for sharing and discussion. Dads may enjoy participating in father-son or father-daughter outings, and moms may enjoy spending an afternoon with other moms and their children.

Program leaders should find creative ways to reinforce lessons from the curriculum during the gender-specific activities, and the activities may offer an opportunity for women and men to talk freely about certain topics due to the nature of the group and shared ideas. Staff who are similar in ethnicity and belong to the same gender are likely to contribute to group cohesiveness. Although gender-specific activities have value, programs must balance these with activities for couple to meet program goals.

VI. RECRUITMENT
Recruiting couples to fill a workshop can be challenging. Couples should (1) know what they are signing up for, (2) have schedules that allow them to attend together, and (3) agree to attend. Low-income couples are likely to have additional challenges that can be obstacles to successful recruitment efforts, such as unstable work schedules, lack of reliable transportation, financial limitations, and lack of resources to pay for child care that is necessary for both parents to attend.

> **Marketing versus Recruitment**: The terms marketing and recruitment are often used interchangeably. Although there is some overlap, they have distinct purposes. *Marketing* promotes your organization, its mission, and the services you provide to the community. *Recruitment* is specific to getting participants in the program. In other words, marketing is the means to the end (recruitment) and is part of a recruitment plan. Understanding the difference will help you manage your resources more effectively while accomplishing the goals of your program.

a. Training Good Recruiters
Program managers should think strategically about who is going out into the community to get referral partners on board and to recruit couples. Recruitment staff or intake workers should be warm and social. They should be comfortable striking up a conversation with anyone, anywhere, and be able to build trust so that people will feel safe sharing information with them. Recruiters should have experience with and be able to relate well to the population your program is targeting. Further, it is beneficial to have recruiters/intake workers with some marketing or sales skills. This team of people is your front line. They are the face of your program, and their success at bringing people in the door is

crucial to the overall success of your program. Remember, ***even if you build a strong program, couples may not come unless you have an effective marketing and recruitment strategy***.

Like any good salesperson, recruiters need to ***believe in and understand their product***. Make sure that recruitment staff know what the program is about. This will be difficult at the very beginning, before the first program workshop has begun. Managers should consider introducing recruitment workers to the program by doing a demonstration of the curriculum with staff or a small group of volunteers, or to the extent possible, including them in curriculum trainings. This will allow staff to see and experience the program for themselves, giving them a greater sense of authority when talking about the program. Positive word-of-mouth testimonials can be the best marketing message in the community.

Finally, all staff in your organization should be viewed as potential recruiters. They should be equipped with brochures or small cards with the program contact information. They should also be trained to respond to the question, "What is (insert your Supporting Healthy Marriage program name)?" Every one of your staff should be able to deliver a concise, 30-second "elevator speech" that describes the benefits the program and why a couple would want to enroll — receptionists, recruitment staff, FSCs, and administrative staff. Give staff an overview of the program components and a sample of the curriculum. Help them understand the incentive structure and how to enroll. Not everyone needs to be an expert in every component, but the more voices you have in the community talking about the value of your program, the more likely you are to successfully recruit couples.

Staff members with great recruitment take-up rates should share their strategies with others. Effective recruitment strategies require strong messengers and clear messages. Program managers will want to continually assess and train staff on what is working (see Tracking Progress below).

b. Community Referral Partners

You may want to develop a multistage approach to reaching out to community partners. The first step is to use your knowledge of other community services and providers to identify key resources to support your outreach efforts. List the types of agencies you may want to have in your SHM recruitment network. Make sure you include organizations that work with fathers, mothers, couples, and children. Start by contacting those organizations where you already have relationships. Then build on those relationships to expand your network. When working with trusted community-based organizations, particularly places of worship or social services organizations, highlight how the work you do supports the work they do. You may want to ask them to host a workshop for their congregation or clients, who can spread the word to other friends and family.

The following types of places may be good agencies to start to build your referral partner network: WIC centers, food banks, Head Start centers, child care centers, preschools and elementary schools, community colleges, family service centers, unemployment centers, grocery stores, Laundromats, barber shops, medical clinics and hospitals, car washes, beauty salons, and local places of worship.
Schedule an in-person meeting to introduce your program to potential referral/recruitment partners. To ensure that there is adequate time to talk about both the referral partner's practices and the program, try to schedule initial one-on-one meetings with potential recruitment partners/referral agencies to get to know their services, intake processes, and eligibility requirements, as well as their preferences for how your SHM program can work with them to recruit interested couples. Once the leadership at that organization understands your program, arrange to deliver a presentation to their field staff. If funding permits, deliver a presentation over a working lunch or before the workday. Bringing donuts/bagels/muffins and coffee may be a good way to draw staff in to listen to your pitch.

Community partners may offer different things to your program. Some may talk to their clients about it and make direct referrals. Others may allow you to advertise for free, spend time in their waiting area talking to potential couples, donate space for workshops or supplemental activities, provide child care, or even print flyers. When you reach out to potential partners, have specific expectations and discuss a plan for your partnership. If they offer to refer clients, agree to a weekly target number of referrals and get the name of a specific staff person with whom you will be working. Many programs are willing to say, "yes, we'll help," but without an action plan, those generous offers often go unrealized. Programs may also consider having contests or challenging referral partners to increase the number of people recruiters have access to.

Once you have established a connection, assign a staff person to stay in contact with key members of your referral network to encourage and acknowledge their efforts. You will want to keep them informed about the progress of your program, update them on any changes in SHM enrollment procedures, and find out about changes in their practices. Finally, you will want to be sure to express your appreciation for their being a strong, committed recruitment partner. You could also consider various ways of providing incentives or recognition for the referral partners who send you the highest number of eligible couples, for example, delivering homemade baked goods to their staff, bringing breakfast or lunch to their office, or hosting recognition dinners.

Ideally, your program can reach and recruit couples together so that you do not rely on one spouse to convince the other that this is a good use of their time. To do this, programs may need to consider innovative strategies for finding couples where they are together. This may be in public areas such as malls, baby/children's stores, community events, or places like churches, doctor's offices, school-related functions, or a couples bowling league.

c. Tracking Progress

Finding out how people heard about your program and how often they heard about it can enhance your recruitment and marketing efforts. Couples may see a poster at their child's school, look at a brochure at the doctor's office, and then call the program when they get a direct mail flyer. It may take more than one "touch" to get a couple to take action and call your program.

Ask parents and couples who come to the program how they heard about it and keep track of their responses. If one outreach partner or advertising/outreach method appears to be more effective for recruiting couples, direct your team's marketing efforts to intensifying those activities. Similarly, ask couples what appealed to them about the program. You may think that a strong parenting message attracts couples and be surprised to find that couples wanted to work on other aspects of their relationship. It is especially important to track this information by gender.

Ask for feedback from your referral partners. You will need to assess whether your referral partners are delivering an effective message or if their program is not a good fit as a recruitment avenue. Keeping in touch with these partners and observing (if possible) how they explain the program and make referrals can help program managers assess the partnership.

Another mechanism for tracking where couples are learning about the program is to use different contact names or phone extensions on flyers placed in different locations. This is ideal if you can change the contact name/information on your flyers with ease and track where specific materials are being placed.

SHM programs should establish recruitment benchmarks to manage workshop start-up and family support caseloads. Benchmarks can be quantitative (measuring the number of couples who received information about the program, who scheduled an intake, or completed an intake) and qualitative (measured by observation or gathering input from couples). Any accessible and user-friendly data management system can serve as a valuable tool for assisting staff with quantitative benchmark measurement and tracking.

It is important to set challenging yet realistic program goals; too many or unrealistically high benchmarks can make it difficult for staff to focus on key objectives and follow through. To achieve this balance, benchmarks may have to be refined over time to maximize staff performance or reflect changes in your services. For example, programs may want to calculate the conversion rate of referrals to enrollments. This can help the recruitment team determine about how many recruitment efforts are necessary to enroll enough couples to begin a workshop series. Establishing benchmarks for referrals, outreach efforts, and intakes can help managers assess the recruitment effort.

VII. MARKETING

The following four points are key to marketing your SHM program.

- *Sell the benefits, not the service*. You are not offering a "marriage education workshop" but rather an opportunity to acquire skills that can help participants avoid arguing over issues many couples struggle with, like who does what chores and feeling unappreciated.
- You want to attract couples to your program and you therefore need to *appeal to both men and women*. Marketing messages should resonate with both husbands and wives.
- Your message must reflect an *awareness of the logistical barriers* that would likely impede the ability of low-income couples to participate in a marriage education workshop.
- *You never get a second chance to make a first impression*. Your marketing efforts need to be culturally relevant, eye-catching, and informative. If you are missing any one of those ingredients, you are wasting money.

Your message should align with your guiding principles. These principles establish a framework for your program and should be key to how you promote services. The language will change, but the ideas in your marketing messages should be consistent with these three principles.

SHM Guiding Principles

- Design programs to meet the needs of couples, not individuals.
- Emphasize couples' strengths rather than their weaknesses.
- Make safety for individuals and for the couple paramount throughout the program.

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a. Choose the Right Name for Your Program

When naming your program, you want to convey action and positive outcomes such as "In Love and Loving It," or "Adventures in Marriage and Parenting," or "Happiest Couple on the Block." These names give a sense of fun while also describing some program features. Names of SHM programs included the Together Project, Marriage for Keeps, Loving Families, and Strong Families.

If you are targeting a specific population, consider referring to it in the program's name. For example, if you are targeting first-time expectant parents, a name such as "And Baby Makes Three" may be appealing. Or if you are working with parents of school-age children, you might want to call your program "TEAM Mom & Dad," which conveys it is for parents working together toward a shared goal. However, if you are targeting a more diverse target population you would want to avoid a name that indicates the program is for a limited audience.

Naming your program takes time. You will need to brainstorm ideas, match them with themes, logos and graphics, and then get feedback on the name to see how well accepted it is. This is no small task. Once you have invested in business cards, letterhead, and brochures you will not want to change the name. It can be difficult to come up with a name, and you may want to test your idea among your target community. You should also "Google" your name on the Web to make sure there are no other programs in the area by the same name.

Knowing your audience means being sensitive to cultural nuances, age, literacy levels, and gender. You may want to avoid using the words "education" or "classes" in your program name or when marketing your program. This can be a turn-off to some people, especially those who did not succeed in traditional educational environments. Similarly, in some communities, messages that tell couples "we can teach you to communicate better" may work, whereas in other communities people will be more responsive to more empowerment-focused messages that indicate "you have the skills to improve your communications." You should also use language that is appealing to men, that conveys action and strength, such as build, team, tools, and invest. Finally, use clear, simple language and avoid jargon.

b. Sell the Program's Benefits

The term "marriage education" may not resonate with couples in your community or with other service providers. Emphasize the program's ability to solve common problems that couples and parents may face. This can be especially effective with specific target populations, such as adoptive couples or new parents. More general examples include:

- Never enough time for each other? The (name of your program) sponsors "Date Nights" with free child care.
- Frustrated with fighting over who does the laundry and changes the oil? (Name of your program) can help you learn techniques to work it out.
- Anxious about dividing your holiday time between your family and your in-laws? (Name of your program) can help the two of you learn how to develop a plan together, manage the stress, and keep the holidays happy.

To best get this message across, consider how you can "show" people what marriage education is. A video or role-playing exercise (as part of a presentation) can help people better "see" what it is you are offering.

Depending on your audience, you may also talk about the research behind marriage education and explain that outcomes for adults and children can be improved when the family structure includes a healthy marriage.

c. Potential Marketing Venues

There are a variety of ways to market your program. You must determine where to find and how to reach low-income couples in your community. Common marketing tools used by SHM programs included:

- Brochures to put in waiting rooms, near cash registers, in Laundromats

- Direct mail materials
- Radio ads (Public Service Announcements [PSAs]), interviews with radio personalities, paid advertising)
- Community newspaper or magazine ads (and stories)
- Online (Web site, Web site banners, craigslist, video clips on youtube.com, networking sites)
- Flyers or posters to hang on community bulletin boards, in schools and community colleges, at houses of worship, community health centers, job training centers, WIC offices, libraries

- Ads in newsletters disseminated by community organizations (such as faith-based institutions, large nonprofits)

- Business cards (for program staff)
- Media (TV and cable PSAs, billboards)

- Signs on mass transit

- Inserts in bulletins of faith-based institutions

- Items such as pens or magnets to distribute at community fairs (job fairs, health fairs, county fairs)

The marketing tools you use need to take into consideration cost, target audience, and geographic area.

No matter the marketing tool, the purpose of marketing is to *recruit* couples. Recruitment flyers should include program-specific information, such as date, time, location, and how to register. Also include any program supports you are offering, such as meals or child care. Contact information should always include a phone number, address, and e-mail address, so families can contact you in whatever way they feel comfortable. Examples of marketing material from SHM programs can be found in Appendix H.

d. Targeting Marketing Efforts and Controlling Costs

Although in many cases "you get what you pay for," in today's economy marketing costs must be reasonable and align with program goals. Without a good plan, marketing can quickly overwhelm your budget. Costs associated with marketing include hiring a graphic designer, reproduction/printing, art/photography rights, translation (if you need materials in more than one language), mailing, and purchase of air time or print space. Knowing who you are targeting can help you determine how best to allocate your limited marketing dollars. For example, if you need to recruit 10 or 20 couples for a workshop, you probably do not need to invest in a radio ad that airs to 100,000 people during prime time.

First of all, be clear about what you want to achieve, so that your marketing efforts are not wasted. You must be clear about *whom* you are recruiting and where encounters with the target population are likely to occur. Some SHM programs host focus groups in particular communities to help target their marketing efforts. Include key stakeholders, such as HR directors at companies with low-wage jobs, pastors/faith leaders, or school principals, as well as potential service recipients, to get a variety of ideas

about what people are listening to, where they are going, what they care about, and what messages resonate with/appeal to them.

Identify some low- or no-cost opportunities for marketing your program.
- Contact local television and radio stations about opportunities to be interviewed on news programs and community talk shows.
- Identify citywide online directories.
- Participate in local service provider meetings. Highlight how the work you do supports the work they do.

One of the best free sources for recruitment is satisfied participants. Get testimonies (written quotes or video) from participants that can be used in marketing materials. Your program might consider offering a small incentive to current participants who refer new couples. Small items like a gift card for gas or a local coffee shop can be given if the referred couple enrolls in the program.

e. Getting People's Attention
You might have an ad that airs during a prime-time TV show, is a billboard over the busiest intersection in your community, or a flyer that speaks to the benefits of having a healthy marriage, but couples won't hear it, see it, or read it if it doesn't get their attention.

Good marketing materials should sell the program without anyone there to explain it. Posters, trifold brochures, single-page flyers, and other materials need to describe what your program is, why you should go, who your program is for, and how to get more information. "Quick hit" opportunities (such as a 15-second PSA, a billboard, or a flyer posted on a community bulletin board) need to get the message across quickly, whereas materials placed in a waiting room or printed in a church bulletin or newsletter may be read more thoroughly and can contain more information.

Remember that your marketing materials must appeal to both members of the couple — men and women. Traditional social services organizations may find this a new mindset. In a program for couples, it is important to communicate with both members of a couple equally.

Visual images are a good way to communicate your message. Remember that a picture is worth a thousand words. However, you want your "picture" to be reflective of your community, portray men and women as important family members, and relate to your target audience. The photo that attracts young, newly engaged couples without children may not appeal to couples with school-aged children who are more focused on managing the day-to-day than planning a big event to celebrate their love for each other.

A key strategy to appeal to couples is to address issues that may prevent a couple from attending the program together. If your program offers supports such as child care, transportation (such as bus passes or covering the cost of gas), and meals/refreshments, tell people that. This eliminates a potential obstacle to attendance.

VIII. ENROLLING COUPLES IN THE PROGRAM
Intake is often the first time participants are able to have a substantive conversation with staff about the program, and it is a unique opportunity to promote the program. Participants should leave feeling that

the program is fun and can help them solve real problems. The following tips can assist program staff in developing and administering an effective intake process.

- Be clear ahead of time about the key points you want new participants to walk away with from the intake process.
- Staff should be clear about the goals of the program, the services being offered, and expectations of couples who enroll, and be able to communicate these in a concise manner.
- Staff should deliver this information in a way that emphasizes the benefits of the program to couples. Staff should be sure to inform couples about the availability of participation supports, such as transportation and child care, and any incentives the program offers.
- Staff should be clear about what the program is but also what it isn't. Do not promise things you cannot deliver.
- Managers can consider working with staff to write scripts to use to guide intake conversations and ensure that program information is consistently delivered.
- If couples start to share personal or sensitive information, tell them that you are going to connect them with the right person who can help them with their particular concern. Allowing the couple to disclose excessive personal information in this initial session can lead to the individual/couple leaving and feeling too ashamed or embarrassed to return because of how much they revealed. Depending on how you staff your intake process, intake workers may also not be qualified or feel comfortable responding to personal disclosures.

If your program requires substantial paperwork for enrollment or evaluation purposes, the following tips may apply:

- Once you have established rapport, strike a balance between collecting information for program management/evaluation and not overwhelming participants with paperwork. *Begin with a conversation, not with filling out forms or asking for documentation.*
- When you believe the couple has asked all of their questions, and you've described the program, *then* ask them if it is OK if you ask them to fill out a few forms. Be sure to explain the purpose of the information being collected and how it will be used. Do not ask for information that is not necessary.
- Determine whether some forms need to be filled out at initial intake and whether others could be filled out at a later time. Too much paperwork can turn off potential participants.

a. Encouraging Engagement and Couple Commitment at Enrollment

Staff who enroll couples can play a role in supporting participation by immediately engaging the couple in services and building enthusiasm for the program. This work helps ensure that the program will not "lose" participants between enrollment and the start of services.

- Make sure intake workers state clearly that SHM is a voluntary program that you believe can be very helpful to the couple, but also stress that it is important that the couple feel this way, too. Ask the couple what they have heard about the program that seems relevant to them. For example, intake workers can ask:
  - What do you feel you need help with at this time?
  - On a scale of 1-5, where 1 is not interested and 5 is ready to participate, where do you see yourselves?

This gets the couple to make a definite commitment, which may help increase participation. Also tell the couple that you look forward to seeing them next week. People tend to make commitments to people, not programs.

- Ask if both members of the couple feel the same way. Do a scale for each member of the couple as well as together. This will allow staff to anticipate what will happen if one member of the couple feels stronger about attending. Problem-solve with the couple if one of them wants to come and the other doesn't. Can they compromise? Can they agree to both try it at least for one or two sessions?
- If possible, arrange for the couple to be introduced to their FSC at the end of the intake meeting and establish a date, time, and method of communication for follow-up (phone call, home visit, office visit). Consider creating "appointment cards," where intake staff note the time, date, and format of the agreed-upon contact, and give this to the couple before they leave.
- In addition, identify a plan of action with the couple in case they cannot keep their appointment. Say something like, "I will look forward to seeing you next Tuesday at 7 p.m. If you cannot make it, please call me at_____. If I don't hear from you and you don't come in next Tuesday, will it be OK if I send you a note, call you, or visit you?"

IX. INITIAL ENGAGEMENT AND RETENTION IN SHM ACTIVITIES OVER TIME

As a voluntary program offering a year-long package of services to couples, all SHM programs should anticipate facing challenges in getting couples in the door of their program and keeping them engaged in services for a full 12 months. Many factors come together to make programs attractive to participants, in addition to offering a marriage education curriculum that is interesting, relevant, and fun. Equally important are strategies for engagement and retention and plans for providing supports such as child care and transportation to remove barriers to participation.

a. Initial Engagement Strategies: What Happens Once Participants Are in the Door?

First impressions go a long way in setting the stage for your program's interactions with couples and may determine whether a couple feels encouraged to come back after completing intake. Here, we break down factors that contribute to positive first impressions into seven key areas for program managers to think through as they craft initial engagement strategies:

1. Creating a **welcoming environment** that is attractive to couples and children
2. Establishing **hours of operation** that make services accessible
3. Designing **culturally appropriate** programs and materials
4. Being attentive to how **staff welcome** participants into the program
5. Getting the **relationship off on the right foot**
6. Establishing consistent, **proactive strategies for maintaining contact** after intake

1. Program environment

The first step in engagement is providing an environment that is inviting and welcoming to couples. First impressions are often lasting ones, and programs should evaluate their office environment to make sure that the first impression is as positive and welcoming as possible. For example, programs should ensure that:

- The space is safe, bright, clean, and orderly, neither too feminine nor too masculine, but painted and decorated in a style that is appealing and gender-neutral. For example, walls are not pink, with posters depicting only women and children.
- There is a reception area that welcomes clients as they enter the building.
- Adequate numbers of staff are present to greet and meet with clients so they do not have a long wait.
- Signs are posted that give clear, simple instructions about where to go.
- Furniture is clean and comfortable.

- Colorful posters or art that is culturally appropriate and reflective of the couples you serve is hung on the walls.
- Bathrooms are clean, accessible, and clearly marked.
- An area is set aside for children that offers safe, clean toys for different ages as well as age-appropriate books or magazines. If possible, have child-sized furniture.
- A place is set aside for privacy if clients are being interviewed or need to discuss sensitive issues.
- Managers ask neutral parties, such as staff from other agencies or clients, to conduct a "walk through" of your agency or program space to assess the overall message being conveyed.

2. Hours of operation and accessibility

SHM programs will need to establish hours of operation so that the maximum number of participants can attend activities. Programs and activities must be offered at hours when working couples and parents can attend; this will likely mean evenings and weekends. Additionally, the agency should be located in a place that is safe for parents to travel to with children during evening hours, and public transportation and free parking should be available. If this is not possible, transportation such as van pick-ups, taxi vouchers, and parking reimbursement should be provided.

3. Cultural appropriateness

To make programs attractive and welcoming to participants from a range of backgrounds, SHM staff can ensure that:
- Posters and art on the walls reflect the populations you are serving, including men and fathers.
- Signs are in English/Spanish/other languages appropriate to the program's population.
- Interpreters are available if necessary.
- Artwork, pictures, or posters show families/people of different ethnic/racial backgrounds as well as all kinds of different families (such as stepfamilies, two-parent families, or grandparents).
- The waiting room has simple reading material, available in different languages, about the program and/or other community services.
- If magazines are available, they focus on family-oriented magazines as well as those that appeal to both men and women, including ethnically or culturally specific newspapers and magazines.
- Written materials about the program are available and are written in simple language and translated. Aim for sixth- to eighth-grade reading levels.
- Ensure that staff recognize that individuals might speak but not read a given language.

4. Staff reception

As the first point of contact many participants will have with SHM staff, programs should be particularly attentive to staffing their reception desks with knowledgeable and friendly personnel and developing standards for the way clients are greeted. Staff who greet couples as they enter the building should strive to say hello to all participants who enter the agency and ask what help they can provide within the first minutes of their arrival. If other participants are ahead of them waiting for an appointment, staff should acknowledge their arrival and let participants know that they will be able to assist them soon. Couples should be informed if they should expect to wait. Reception area staff should be encouraged to take time to help couples feel at home by establishing rapport. This can include asking questions that show genuine interest, but are not intrusive, and offering the couple water, and if possible, coffee, tea, and/or snacks. Additionally, staff should get to know couples' and their children's names and use them often throughout interactions, keeping in mind that low-income people and people of color often feel "invisible" and unacknowledged in our society. Finally, program staff should appropriately reflect the members of the program's target population in terms of race, gender, ethnicity, and language group.

Having men on the staff is an important factor in making men feel welcome and feel that this is a program that will address their specific needs.

5. Getting the relationship off on the right foot
The program's goal is for the first interaction between family support staff and participants to be value-added: Participants walk away from the meeting with something of use to them. This can be accomplished by asking if there is some immediate concern that the couple needs help with and being sure to put a plan in place for how they will begin to address this need before they leave. Again, do not promise something your program cannot deliver. The goal is to convey the message that you are willing to work with the clients to develop a plan to address their problem, even if it means putting them in touch with another organization. If possible, facilitate the initial call to the referring agency and introduce the individual or couple. Do not talk for them or try to solve the problem. Remember that this is a strengths-based model that believes people have the ability to manage their own lives.

6. Establishing consistent, proactive strategies for maintaining contact after intake
The period between intake and the first activity or marriage education workshop should be looked at by managers and staff as a "high risk" moment for losing participants. SHM programs should map out plans for minimizing the time between intake and activities and for proactively maintaining contact with new enrollees. Agree as a team how often staff should be in contact after intake, who is responsible for making contacts, and what form these contacts should take. Will case managers make follow-up calls after one week? After two weeks? Will they send a postcard? Are home visits an option the program can consider to increase the in-person contact with participants?

b. Retention Strategies: Keeping Couples Engaged in the Program Over Time
Once the program has enrolled new participants and has succeeded in getting them to come to their first activity, SHM managers and staff will need to develop strategies for retaining participants in the program. Managers may find that different retention strategies are needed for different phases of the program and will likely need to routinely review the strategies they are employing to ensure that they continue to effectively accomplish their goal.

Strategies for promoting retention in SHM services include:
- *Operate a program that is interesting to and meets the needs of the population.* SHM staff may consider doing small surveys of new participants to get their input on what types of programming and services they most need and find most attractive. Doing this regularly helps staff tailor their programming and identify community services that may be helpful for their participants.

- *Make sure your program is accessible, given your participants' work schedules and family demands.*
  - Managers should start from the assumption that most couples will not be able to attend a series of workshops without missing a few due to child care, transportation, work, or other family issues. Managers and staff should anticipate that participation may be inconsistent over time for some families.
  - What options is your program providing for make-up sessions for couples who are unable to attend every week? You may consider working with your curriculum developer to think through options like offering occasional make-up workshops or substituting home visits for a missed session.

- Programs should consider offering workshops at different times of day and different days of the week and creating a printed calendar that is sent or e-mailed to couples.
- Has your program considered delivering the curriculum by starting with an intensive "kick-off" weekend or day, followed by a weekly menu of shorter workshops, events, and activities (all scheduled during weekend or evening time slots)? Some curricula may be well suited to this kind of structure.
- Programs could consider setting up a "buddy couple" system in which buddies check in with each other during the week.
- Routinely ask couples how your program can be made more convenient for them.

- *Incorporate fun for couples and kids into your program plan.*
  - Meals, fiestas, date nights, and family outings to a local park or ballgame can reinforce lessons from SHM curricula that couples and families should set aside time to play together.
  - If your program offers food, make sure it is culturally appropriate and be attentive to your group's preferences for hot food versus cold food at mealtimes. Asking couples what they like encourages program buy-in and a sense of being heard.

- *Create a program newsletter to remind couples of program events, key curriculum concepts, and how to get in touch with their FSC.* Newsletters can report milestones, such as anniversaries of workshop participants, and activities.

c. Offering Participation Supports to Promote Engagement and Retention

SHM programs may want to consider creating a package of participation supports that will help you reach your engagement and retention goals. Participation supports serve two purposes. First, they help remove barriers such as lack of transportation or child care funds that could prevent couples from attending workshops and events on a regular basis. Second, participation supports can be used to help make the program fun and exciting for couples, an event they look forward to attending. Programs are strongly encouraged to create a package of participation supports that include the following three categories:

- Child care
- Transportation
- Emergency assistance

In addition, programs can offer **incentives**, or small gifts and awards, which participants receive for attending workshops and supplemental activities. The SHM team does not require the implementation of incentive packages; this decision is entirely up to the program and should be based on your agency's or program's culture and ability to manage the administrative details of delivering an incentives package. Incentives should be modest in amount and should be structured in a way that reinforces themes and lessons presented in the marriage education curriculum. Also, keep in mind that couples need to know about and understand how to qualify for incentives in order for them to be effective.

Fundamentals: Child Care, Transportation, and Emergency Assistance

Even though the SHM program is free, couples will still incur costs by choosing to participate in marriage education workshops and supplemental activities — costs that low-income couples may not easily be able to cover in their family budgets. They will have to take time from busy family schedules to enroll and attend workshops and events. They will have to make extra trips by car, train, or bus to get to the

SHM program site and perhaps transport children to a child care provider before and after SHM workshops. Extra money will be spent to pay child care providers. Couples in an August 2006 Oklahoma focus group reported that transportation and child care were the two main barriers to participation. For some, the extra cost of gas in a year when prices reached nearly $3.00 a gallon was prohibitive, particularly for families who lived a distance away from the program. For many, the cost of child care one night per week — particularly for couples with more than one child — meant they could not always afford to attend SHM events. For some, finding child care at all was a significant barrier, and couples said that on-site child care would have solved this problem. SHM programs may not be able to provide on-site care, but can be prepared to offer couples financial assistance and referrals to child care agencies, if needed.

Similarly, low-income families may be more hard-hit by unexpected costs such as car repairs and health care bills. Pressure to find ways to cover these costs — whether by working more hours or visiting social services agencies to seek assistance — can also be barriers to participating in weekly marriage education workshops. FSCs will play a key role in helping couples identify community resources to address these circumstances, and the program can consider offering emergency funds to couples to help cover unexpected costs. All of these costs can add up and strain already tight family budgets, and for some couples, may be the deciding factor in whether they can regularly attend your program.

Things to consider in administering child care and transportation assistance:
- Ensure that adequate funds are available to cover child care and transportation for attendance at workshops, supplemental activities, and office-based family support meetings. This is the most important participation support your program can provide to help couples attend — do not cut corners here. If your program's budget is tight, consider reducing the amount of your incentive package in order to have adequate funds for child care and transportation. Adopt a strategy that helps take care of couples' necessities first, and then determine what bonuses your program can offer once those needs are covered.

- Make sure that couples know about the availability of these supports. You can consider noting in your marketing materials that child care and transportation assistance are available.

- Once they are in the program, be sure to remind couples again that they have access to these supports. Explain how your program administers child care and transportation assistance so that participants understand what the process is and what documentation they must provide, if any.

- Each organization will need to determine procedures for providing child care and transportation that make these supports simple for couples to access while meeting agency requirements.

- Programs will need to decide on an amount they will set aside for transportation and child care per couple. This should be enough to provide transportation and child care for each event your program expects a couple to attend.

Things to consider in administering emergency funds:
- Programs should decide on an average amount per couple that your program will set aside for emergency expenses.

- Programs should decide what level of documentation your program will require to show need for assistance:
    - Copies of bills? Quotes from auto repair shops?
    - If the request is under a certain amount, will the documentation requirements be less burdensome than for larger amounts?
    - Your program will need to strike a balance between making assistance available in a way that is not overly bureaucratic or burdensome for couples and not sending a message that the program will give away funds without first verifying that assistance is needed for their participation in the SHM program.

- Program managers will need to set up a system for how your program transfers emergency funds to couples. Will you write checks to vendors? Give cash payments directly to couples? Make sure your staff understand these processes, can explain them clearly to couples, and can inform them how long it will take to receive the funds from the time they make a request. If your program plans to give cash to couples, plan how you will establish appropriate controls and record payments.

- Programs will need to create guidelines for how often couples can receive emergency assistance and over what period of time. Will your program give one-time-only assistance? Or will assistance be given up to a certain dollar amount? If your system is one-time-only, are there instances where your program would make an exception? If so, have clear guidelines for this so that staff can apply the rules consistently for all couples. What is the cap your program will set on emergency assistance per couple?

Incentives

Another way to keep your program fun and engaging is to offer incentives to couples when they attend workshops or other activities. Incentives are also a unique way to reinforce themes of the curriculum. In developing an incentive plan, you should first think through a set of principles to guide how you structure your incentives, ensuring that the structure you adopt effectively supports the goals of your program.

A sample incentive structure is located in Appendix I.

Things to consider in designing an incentive package:

- Incentives should be modest in amount and symbolic in nature and not so large that they give the impression you are "paying" couples to attend the program.
    - We discourage programs from offering incentives so large that a low-income couple could feel compelled to participate because it is a financial offer they can't pass up, rather than deciding to join the program because they are really interested in the content. Once couples are enrolled, the program can then explain that there are periodic incentives offered along the way as they participate in SHM activities.

- Offer incentives for participation in all types of program activities, not just marriage education workshops. The existence of an incentive for participation only during the core curriculum might send a message that the later activities are less important, when continued participation in family support and supplemental marriage education activities is an equally important part of the program.

- Spread out any gifts or incentives over time to reward continued participation. Don't give out everything right away. However, since many program managers note that the biggest challenge is getting people in the door the first time, a fun series of up-front incentives can help attract couples to the first few sessions. After that, the goal is that the program will be meaningful and useful enough such that couples will come back on their own. Consider staggering the amount of incentives over time, so that larger incentives and smaller ones are strategically alternated.

- Tie incentives to workshop content. For example, in a session that discusses parenting, you might give a gift certificate to a retail store and encourage couples to purchase an age-appropriate game to take home that will help the couples spend "quality time" with their children.

- Tailor the item offered as an incentive to what participants respond to best. This means getting frequent feedback from participants on how they view the program's incentive system. Where appropriate, make changes to maximize the potential appeal of the incentives. Note: When asking about "incentives," do not refer to them as such; instead, ask couples what they need or if they liked a particular item (such as a gift card, game, movie night package, or book).

- Separate incentives from assistance with child care and transportation and emergency funds. Those things help couples take care of logistics to enable them to attend your program. In contrast, incentives reward and reinforce learning and help create a fun atmosphere at your program.

Some cautions:
- Programs will want to check with their local welfare agency about rules regarding receipt of cash and gift certificates, so that SHM incentives do not inadvertently reduce the amount of a family's monthly benefit.

- Programs should not design incentives that reward certain behaviors such as not divorcing, not separating, or having children. This can create the impression that you are "paying people" for achieving these outcomes, which is not the goal of the SHM program.

- Programs should not place criteria on incentives that make them available to only certain types of couples and not others (married the longest, newly married, never divorced, for example). These structures can create a sense of competition, or unfair favor, rather than support and camaraderie among participants.

- Incentives — no matter how attractive — will not overcome low participation if the program is not presenting information in an interesting and engaging manner or if it does not meet couples' needs. If low participation is a problem in your program, it may be time to collect information from couples on their perceptions to better understand how to tailor your program.

X. RECRUITING AND HIRING STAFF
SHM programs will need to hire staff to fill a range of program functions, including marriage education workshop facilitation, planning and conducting the supplemental marriage education activities, providing family support and referrals, and proactively maintaining contact with couples to encourage participation. In addition, programs will need to provide adequate supervisory structures for these staff. Programs may opt to hire a smaller core staff and grow the team as enrollment numbers grow.

a. Staffing Structure

SHM encourages programs to be creative in meeting the SHM program guidelines within their existing infrastructure and delineating staff responsibilities in a way that makes sense for their organization. The responsibilities and qualifications that an SHM program will need to fill are listed below. This may seem like a long list, but keep in mind that this is a list of responsibilities, not necessarily individual positions. Some job responsibilities can be designated to other program staff based on their strengths.

Not all positions are full-time jobs. Individual staff members could perform some combination of these duties, depending on the program. For example, a program could decide to have a facilitator also act as a coordinator or manager for supplemental marriage education activities. In many programs, outreach and recruitment staff have also worked as intake staff. SHM programs have developed various staffing plans, and the staff have ranged from about 12 to 16 employees, including full- and part-time staff.

Programs may use contract employees. This may be most appropriate for workshop facilitators or to lead supplemental marriage activities. There is a concern that these staff may not have sufficient involvement in SHM or contact with the program manager and FSCs. While some programs would prefer to hire full-time staff, there can be benefits to using contract employees. For example, it may be difficult to find enough qualified personnel to work the flexible schedule required of some positions and it may be more cost-effective to pay a rate per workshop or hourly wage instead of paying for full-time staff.

The best staffing configuration will vary by program, but if you do plan to use contract staff, it is preferable to mix them with part- or full-time employees of your organization rather than relying solely on contract staff to fulfill one program component. For example, when using contract employees as facilitators, programs must be conscious of integrating them into the SHM team:

- A small group of contract facilitators should be teaching on a regular basis rather than having many facilitators who teach only occasionally.
- Have full-time staff members who have taught the curriculum before and can act as back-up facilitators. They do not necessarily need to be permanent members of the workshop facilitator team, but they should have taught at least one group and be able to step in when necessary.
- Think about how these facilitators will be supervised (how frequently and by whom?), who will be responsible for coordinating and scheduling their workshops, and how the consistency and quality of SHM workshops will be guaranteed.

Included in Appendix J is an example of an SHM program organizational chart.

b. Staff Positions

Program Management: Program management includes supervising staff, monitoring the quality of services provided, managing the budget, and dispersing program funds. The program manager will need to think strategically about how to recruit and engage clients, seek donations of incentives for participation, track and account for participant supports, develop management tools, and track program benchmarks and outcomes. SHM management should also determine who on your staff is responsible for coordinating staff trainings and maintaining training records. Staff playing this role should have extensive management and supervisory experience and may also have an advanced degree and clinical skills.

Supervision: Program managers may delegate staff supervision for some functions, such as intake or facilitation, depending on the size of the program. Supervision could be performed by a separate staff member or could be part of the responsibilities of an employee who also performs another function (such as the program manager). Supervisors of direct service staff are likely to have an advanced degree in an appropriate field and may need clinical experience. Programs should determine an appropriate ratio of supervisors to staff. This might depend on the requirements of your organization, a supervisor's other duties, and the level of experience or training of the other staff. For example, a full-time facilitation supervisor could oversee more facilitators than if these duties are delegated to a facilitator as part of their overall responsibilities. In addition, paraprofessionals might require more intensive supervision than staff with prior clinical experience or training. Qualifications for supervisors include:

- Extensive program management/supervision experience
- (Depending on which supervisory position) Extensive experience with case management, outreach/recruitment, and/or teaching/facilitating groups
- Strong communication and interpersonal skills
- Excellent presentation and interpersonal skills
- Highly motivated
- Able to multitask
- Experience in using data from management reports to track staff efforts and client participation and to measure program quality
- Familiarity with the strengths-based model
- Fluency in the language(s) the program is offered in, proficiency in spoken and written English

Desirable, but not required
- Experience working with low-income communities
- Experience with relationship and marriage education

Outreach and Recruitment: SHM programs will need to conduct several kinds of outreach. Depending on enrollment goals, recruitment can be labor-intensive, and programs are encouraged to have dedicated staff for this function. These staff should expect to work flexible hours, including work on evenings and weekends to reach both parents, especially those who work nontraditional hours. Outreach to referral partners is also part of this job function. Outreach activities may include doing mailings, regularly placing staff in the waiting rooms of particular service providers, engaging couples directly, or phone calls. Programs are encouraged to be creative in the outreach methods they use to recruit couples. General qualifications for outreach and recruitment staff include:

- Experience in recruitment and/or outreach, particularly with a low-income population and/or men as well as women, and/or experience in sales/marketing
- Comfortable with and enjoys working with people
- Engaging and enthusiastic personality
- Strong communication and interpersonal skills
- Ability to establish rapport with people quickly
- Demonstrates creativity regarding recruitment/outreach strategies
- Persistent
- Able to multitask
- Accurate and timely data-entry skills
- Comfortable using computers
- Accepting of performance goals, for example, signing up four couples a week for the program
- Fluency in the language(s) the program is offered in, proficiency in spoken and written English

Desirable, but not required:
- Familiarity with community-based organizations and programs in the area
- Experience with marriage education

Intake: Programs will need to designate enough staff members to conduct intake to achieve program goals. Programs should expect to face challenges in conducting an intake, as they need to engage both members of the couple and screen them to make sure they are eligible for the program. Staff conducting intake will also spend time performing screening or preservice assessments as deemed appropriate by the program. This could require flexible hours, including work on evenings and weekends when working families may be most available. The number of intake staff needed will also be influenced by how much initial outreach and other program activities are conducted by intake workers. (This position may be combined with the outreach and recruitment position.) Intake staff qualifications include:
- Nonjudgmental
- Comfortable with and enjoys working with people
- Engaging and enthusiastic personality
- Strong communication and interpersonal skills
- Ability to establish rapport with people quickly
- Fluency in the language(s) the program is offered in, proficiency in spoken and written English
- Experience working with low-income communities
- Experience working with low-income men

Workshop Facilitation: SHM programs will need to employ individuals to facilitate the core marriage education curriculum. Ideally, workshops should be led by a male-female pair. Facilitators' qualifications will vary depending on the curriculum chosen, but they could include teaching or group facilitation experience, clinical mental health or social work experience, a bachelor's or master's degree, and excellent presentation and interpersonal skills. It is important for programs to identify candidates who not only have experience *teaching*, but who also have experience *facilitating* groups. Teaching and facilitating are different skills that should both be stressed when screening possible candidates. Because marriage education workshops should be co-led, it is also important to identify candidates who have previous experience co-facilitating. Experience with marriage education would be especially valuable for staff fulfilling this role.

Facilitators should also be prepared to conduct workshops in the evening and on weekends to encourage couples to participate. The number of facilitators will depend on the number of workshops running at any given time, as well as the number of couples in each workshop and whether facilitators have other duties.

Facilitators are a central component in your SHM program; therefore, their role cannot begin and end in the classroom. Think about your expectations of facilitators both inside and outside of workshops and how to implement their role. The responsibilities of the facilitators should be clearly reflected in the number of hours you estimate for the position and in the position's job description. For example, you will want to note that certain staff meetings are mandatory and that the facilitators have responsibility for filling out forms for tracking purposes and coordinating with the program manager and FSCs.

Other qualifications for facilitators include:
- Comfortable with and enjoys working with people
- Engaging and enthusiastic personality

- Strong communication and interpersonal skills
- Excellent group management skills
- Fluency in the language(s) the program is offered in, proficiency in spoken and written English

Desirable, but not required
- Clinical experience
- Experience with marriage education
- Experience working with low-income communities and with both women and men

Family Support Coordination: Programs should consider what an appropriate caseload is for each staff member based on the intensity of case management to be provided at different stages of the program, the level of disadvantage in the program's population, and to what degree couples are likely to take advantage of these services. A reasonable caseload might be 20 to 40 couples for each staff member providing family support services, depending on your program's structure. This initial decision may need to be adjusted as the program proceeds and gains experience with the kinds of challenges that couples face. Family support staff should also be prepared to work flexible hours on evenings and weekends. Qualifications:
- Case management experience
- Social work or equivalent experience
- Comfortable with and enjoys working with people
- Engaging and enthusiastic personality
- Strong communication and interpersonal skills
- Maintain personal and professional boundaries and use purposeful, appropriate self-disclosure as a professional tool to develop relationships with families
- Highly motivated
- Strong ability to multitask
- Personable
- Familiarity with the strengths-based model of case management
- Familiarity with community-based organizations and programs in the local area
- Accurate and timely data-entry skills
- Comfortable using computers
- Fluency in the language(s) the program is offered in, proficiency in spoken and written English

Desirable, but not required
- Experience with marriage education
- Experience working with low-income communities and/or men as well as women

Database Coordination: We encourage programs to hire technical staff to develop or adapt a data management system to track program progress. Staff may also be needed to enter intake data and participation data (this might include information about outreach to a couple, workshops or other activities they attend, and referrals or family support services provided). Qualifications:
- Comfortable using computers
- Experience with menu-driven software such as Excel (preferably) or Word
- Experience using the Internet
- Comfortable with and enjoys working with numbers and producing tables and reports
- Understands social service programs and the types of activities and actions that take place in day-to-day operations
- Strong organizational skills with attention to detail

- Commitment to accurate and timely data entry
- Detail-oriented
- Proficiency in spoken and written English

Desirable, but not required
- Experience with Excel
- Experience in creating reports
- Experience in using data on programs to keep track of intake and/or participants and their activities
- Aptitude for learning new software packages that would allow the program to produce other types of management reports.
- Experience in creating reports

Supplemental Marriage Education Activities Coordination: SHM staff need to plan, implement, and market these activities on an ongoing basis to make sure that couples are aware of activities, participant supports/incentives are accounted for, and participation is tracked.

Reception and Administrative Staff: It is important that a staff person is always available to answer calls from couples and direct them accordingly and welcome couples as they arrive. Reception staff should be friendly and knowledgeable about program services. This staff may also assist with data entry, logistics, and scheduling program activities.

A sample SHM program job description can be found in Appendix K.

c. Qualities of a Strong Candidate

Unlike mandatory social services programs that require a certain level of participation for enrollees to receive a benefit or reward (for example, a public assistance support payment), SHM relies on the voluntary participation of couples. This voluntary feature of the SHM program model makes it even more important to implement high-quality service delivery to encourage couples' ongoing participation.

Creating the type of positive and enticing environment that encourages ongoing participation requires staff that are both dedicated to their jobs and experienced in what they do. In addition to the specific skills cited above, below are certain universal qualities programs should look for in staff to create the particular environment that a well-functioning and smoothly operating SHM program requires.[5]

Buying into the Program

First and foremost, having a solid buy-in into the goals and mission of SHM makes any candidate stand out from the standard pool of applicants. Adding someone to your team who is supportive of and believes in your work with couples and their families can only make your team stronger. Although this might already be clear, it is useful to remember that candidates who believe in and support the objectives and mission of SHM are more likely to:
- Be advocates of the program both in and out of the office,
- Invest more of themselves and their time into their work, and
- Withstand the ongoing pressures and competing work demands of their job.

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[5]Some of the information included in this section was adapted from "Ideas for Building and Cultivating the Most Effective Marriage and Relationship Education Instructors." Hurt, Stanley, and Beach (2006).

When gauging how solidly supportive a candidate is of your program's mission and goals, it is helpful to understand how the candidate responds to the following questions:
- How would your involvement with our program be consistent with your long-term goals?
- How would your involvement with our program get you closer to achieving these goals?
- What part of your responsibilities that we reviewed already would you find most rewarding? Least rewarding?

Personal Qualities

First, candidates should have **strong interpersonal skills**. They should possess a strong ability to connect and communicate effectively with other people, even with those they do not know. They should work well with both men and women. They should project warmth, friendliness, and professionalism in all interactions. They should exhibit confidence in their interactions with other people and, at the same time, be sympathetic to differences. And finally, having a good sense of humor can be a boost to helping build interpersonal relationships.

Second, candidates should have **strong communication skills**, regardless of the position for which program operators are recruiting. All program staff, from clerical staff to program managers, are advocates for your program. All candidates should therefore be able to effectively and enthusiastically speak to any type of audience — from a potential couple to a manager at a referral partner agency — on behalf of your team. Candidates should also be able to communicate in a strengths-based way.

Third, candidates should work well in a **team-oriented environment**. This is critical to successful program operations, as each program component in SHM is connected to and dependent upon the other components. For example, the success of the workshop component is highly dependent on the success of the family support component. Without dedicated family support workers who call couples to remind them of their workshops and help them address barriers to participation, couples might not attend their workshops. It is critical that all candidates not only understand the interconnectedness of their roles and responsibilities to the program as a whole, but also thrive in this type of team-oriented work environment.

Fourth, candidates should be **flexible and adaptable** to changing situations and working environments. New protocols and procedures may be introduced and existing ones are changed from time to time. Moreover, because program activities and efforts are centered on the couple, program staff need to be that much more amenable to the changing needs and situations not only of the couple, but also of individual spouses and their children.

Fifth, candidates should demonstrate a **proactive and energetic work ethic**. It is critical for staff across program components to constantly reevaluate their efforts to engage couples in the range of program activities SHM offers. If particular strategies are not successful at engaging couples, staff need to be able to think creatively about other strategies to engage nonparticipants or low-level participants.

Sixth, candidates should have **strong organizational skills and be highly detail-oriented**. SHM requires staff to run robust outreach and recruitment efforts, frequently launch marriage education workshops, and deal with large and consistently changing caseloads. Staff need to constantly pay attention to the competing demands of their work and be able to set priorities without "dropping the ball" on any of them.

Hiring Married Couples: There is an obvious attraction to hiring married couples, especially as facilitators. Facilitators who are married might be more successful at modeling the skills and techniques taught in curricula. However, there are other staffing implications when hiring married couples. For example, there may be unevenness in skills and experience between two spouses. This unevenness might prompt program managers to stop using one of the spouses as a facilitator, which might in turn prompt the other spouse to leave the program as well. Even though this was not the original intent, programs would then lose the time and resources invested in training these two staff. Program managers and supervisors are encouraged to think through the benefits and potential costs of hiring a particular married couple, rather than assume it will always, or never, be a good strategy.

Aspects of SHM with Which Candidates Should Be Comfortable
As in any job recruitment effort, the candidate should be aware of and comfortable with the specific policies and procedures of the organization and its underlying approach to service delivery. When recruiting for SHM staff positions, candidates should be aware of and comfortable with the following aspects of SHM:
- marriage education-focused rather than marriage therapy-focused
- high performance standards
- extensive evening and weekend working hours
- extensive off-site work (for some positions)

d. Interviewing Techniques
When interviewing candidates for any position, there are particular techniques and types of questions you can use to draw out and identify specific qualities and strengths in a candidate.

When setting up interviews, program managers/supervisors might consider inviting other staff to join the interview, or at least invite them to a portion of it. If appropriate, program managers and supervisors can first meet with the candidate and then open the interview to other staff. Do not feel restricted to inviting only staff who work in the same program component the program is recruiting for. For example, facilitators, office managers, and recruiters should be encouraged to join an interview for an open FSC position. FSCs should also join this interview. By including staff from other program components in an interview, you are:
- Communicating to the candidate that the office is a team-oriented work environment
- Deepening the context of the interview with the diverse questions your staff bring to the interview
- Empowering your current staff and allowing them to take partial ownership of the program by inviting them to join the decision-making process

If using this technique, program managers should ensure that all staff attending the interview come prepared with questions that are important to them and their work and actively participate in the interview process.

Interviews are also an opportunity to screen for specific skills the open position requires. Having the candidate role-play through activities he or she would be expected to perform is one common strategy recruiters can use to screen for particular skills. Sample role-plays are listed in Appendix L.

If recruiting for a bilingual candidate, candidates should be asked to run through the interview activity in both English and Spanish, or the general interview should be conducted both in English and Spanish. Also, if you are recruiting for a position that will fulfill multiple roles, the candidate should run through activities appropriate for each during the interview.

Asking interview questions that create a specific scenario for the candidate to respond to is another way to screen for the specific skill set you seek. See Appendix M for sample scenario-based questions.

XI. STAFF TRAINING

Providing continuous support to new staff as they are integrated into current program operations is critical to the successful day-to-day running of any program. Moreover, because of the ongoing program enhancements and operational changes that come with working in a voluntary program setting — one that requires programs to continually evaluate themselves and strengthen program services and their delivery — managers and supervisors should also continually train and retrain current staff on changes in program operations and program staff functions.

The focus and scope of these training efforts depend largely on the context in which they are needed. A new staff member, for example, will receive training on various topics, from domestic violence protocols to recording attendance. Current staff, on the other hand, might receive refresher training on specific topics to encourage continuous improvement of job performance. Because of these changing demands on trainings at any given point in time, it is important for program managers and supervisors to set clear and concrete training expectations for new staff and retraining expectations for current staff in order to guide and prioritize overall training efforts across the program.

The chart in Appendix N lists the range of topics that are important to every staff person's initial training. The chart lists both topics that are important for all staff regardless of their position and more specialized training topics that might only be relevant for a subset of program staff. Program managers and supervisors can use this chart to frame their initial training agendas for newly hired staff.

When training new and existing staff, program managers and supervisors might use a variety of training methods. The SHM team has highlighted some of the core training methods below. These methods can be used either interchangeably or together.

a. Teaching and Instructing

Particular pieces of program operations require managers and supervisors to adopt a more instructive approach to training staff. For example, training staff on the family support case leveling system (see Section X for more on the leveling system) would be hard to do without first helping staff understand the purpose of the case leveling system and then explaining the expectations regarding contacts, their content, and frequency. Another example is training staff on the program's protocol regarding issuing program supports like emergency, transportation, and child care assistance.

The teaching and instructing method may be appropriate when trying to enhance the skill set of your team. For example, outreach workers already trained to do their job may benefit from sales training; FSCs could improve their job by participating in motivational interviewing training, or FSCs could benefit from learning about goal planning.

b. Role-Playing

Training on specific pieces of program operations might also be strengthened if supplemented with specific role-playing activities. Using the same example above for training on program protocols for providing program supports, it might be helpful to supplement an *instructive* training that reviews the protocol with a role-playing exercise that assesses a trainee's understanding of the protocol. For

example, a trainer could act out a scenario in which a program participant makes a request for emergency assistance. The trainee would then be asked to role-play how he or she would first (1) verbally respond to the couple about their request and then (2) outline the steps he or she would follow to have the request reviewed and approved. Role-playing allows program managers and supervisors to understand and assess (1) how respectfully and appropriately staff communicate program policies and procedures to program participants and (2) how faithfully staff follow these policies and procedures. Similarly, programs will need to train intake staff on their general recruitment strategies and their intake procedures for the program. During the training, have staff practice delivering the program message. As they practice, they will get feedback from other program staff on how clearly and succinctly they are delivering the message. People often think they are saying one thing, but the message delivered is not received as intended.

c. Shadowing and Observing
Having trainees shadow their more seasoned counterparts as they do their job is another helpful method for training new and existing staff. Unlike other training methods, shadowing gives managers and supervisors an opportunity to (1) show how protocols and procedures are played out in real interactions between program staff and program participants and (2) highlight preferred ways of delivering program services. A manager, for example, might ask a new recruiter to shadow a strong recruiter at a recruitment event to observe how he or she presents the program to the referral partner or to potential program participants. Similarly, a current FSC, whose supervisor believes may need further training on how to integrate curriculum reinforcement activities into one-on-one contacts with couples, might be asked to observe another FSC who performs this particular task well.

d. Cross-Training
Although secondary to training staff on their primary roles and responsibilities, training staff on other staff roles and responsibilities across program components is useful for several reasons. First and foremost, training staff on other staff roles and responsibilities gives staff a more global understanding of program operations and how their particular function supports these program operations. Cross-training also helps staff understand how their roles connect to the functions of other staff on the team. Second, by creating awareness of how staff fit into and contribute to program operations, cross-training can strengthen staff cohesion and morale. Third, cross-training staff also creates a level of versatility among the team. For example, FSCs who have been trained in outreach, recruitment, and intake approaches could complete intake with a potential couple while outreach/intake staff are out sick.

e. Deciding on the Appropriate Training Method
Deciding on the appropriate training method(s) to use requires planning. The method or combination of methods program managers and supervisors use can depend on various different factors. Knowing your staff and their learning styles and setting clear training objectives can help managers/supervisors develop effective training plans. It is expected that different training methods will be appropriate for new versus seasoned staff. Finally, managers and supervisors should keep track of a trainee's progress.

XII. STAFF SUPERVISION
There are supervisory principles that program managers and supervisors should use in order to provide a framework for their program operations. First and foremost is clearly communicating to program staff the overall program goals and how each staff person's particular roles and responsibilities relate to and support these goals. Staff should clearly understand all the roles they are expected to fill and the responsibilities they are expected to assume in the various program functions and activities, including

those that are performed on a regular basis and those they may take on occasionally. These might be clearly explained through a combination of different documents and protocols. For example, a detailed job description provides a useful summary of work responsibilities for a newly hired staff member.

Second, management and supervisory staff should set clear and attainable performance criteria for each staff person and/or for each staff position and clearly communicate these to each staff member. When operating under this performance-based management approach, the choice of performance criteria is critical. It is important to avoid overwhelming staff with too many performance criteria that appear to have equal weight. This could easily lead to staff arbitrarily focusing on certain criteria over others. Instead, focus on a few key criteria that will clearly communicate to staff what their most critical job tasks are in order to ensure a smooth-running program that delivers high-quality services. In addition, where feasible, performance criteria should be easily measured — that is, the definition of each criterion is clear and as simple as possible, and the information about that measure is available either through program data, logs, or structured observations. Examples of performance criteria are:

- *Productive* recruitment (not just couples, but couples who are eligible and truly interested): number of couples enrolled per week
- *Timely* engagement into services: percentage of enrolled couples meeting with program staff within a certain period of time after enrollment
- Delivery of *quality* services: mastery of group facilitation techniques
- *Retention* of couples: percentage of couples in a staff member's caseload graduating from their core workshop

Third, create clear, detailed, and concrete protocols and procedures that support the day-to-day work of staff. Management staff are encouraged to continually review and revise protocols and procedures as program operations are enhanced.

Fourth, management and supervisory staff should continually assess the effectiveness of the program by reviewing the *content* of services offered, measuring the *quantity* of participation in the program, and evaluating the *quality* of service delivery through a range of practices that are performed according to a clear schedule. These efforts might include regular meetings with the staff they supervise to determine how staff are performing against the performance criteria set, observing activities staff conduct, and taking appropriate actions to retrain staff in the tasks they should complete and on their responsibilities. The following are steps managers and supervisors can take on a routine basis that will most likely provide a good starting point for assessing program operations:

- Conduct observations of staff working.
- Complete one-on-one and group in-depth reviews with program staff of program information, which might include information pulled from the data management system (for example, case notes, reports, and program and/or staff-specific performance criteria), internally produced documents (for example, paper case files and program management reports), feedback gathered from program participants collected through any type of couple-specific feedback process, and feedback for staff gathered during supervisor-level observations of staff efforts.
- Develop and follow an action plan if a staff member is not completing her or his roles and responsibilities, meeting performance criteria, or following protocols and procedures. Part of this action plan might include training and retraining on relevant issues; for example, reviewing the staff person's job description with her or him or thinking through how he or she might be able to better integrate the established protocols into day-to-day work with program participants. Supervisors should consider an action plan that includes defined steps leading to improvement rather than general and global directives. For example, if a staff person is not meeting the required number of

contacts with couples and does not document the contacts, the plan may first call for contacting five of the couples in her or his caseload by a certain date and documenting the results of these contacts. The next step might be contacting an additional five couples and following up on one item with each of the initial five couples contacted.

a. Supervision Protocols

Protocols for Observations of SHM Activities

Observing SHM activities provides a manager or supervisor with an opportunity to focus on the content and quality of services. Supervisors and managers can assess the appropriateness, scope, and accuracy of the content delivered in the activity observed and measure the quality with which it is delivered. From an observation, management and supervisory staff can learn how appropriate particular program protocols are for couples and the staff following them, how faithful staff are to protocols and procedures, and how staff perform on specific, preestablished performance criteria. Observations of program activities can identify areas of growth and training needs for specific staff and suggest revisions or additions to protocols. Observations may also highlight strengths in program operations, staff, and delivery. Finally, observations can help program managers and supervisors assess the quality of service delivery, for example, a facilitator's level of comfort with curriculum material and capacity to deliver the material in an effective way, or a FSC's rapport with program participants. Using what is learned from specific observations, managers and supervisors can then take appropriate corrective actions. This might include feeding back both strengths and weaknesses observed to program staff, retraining program staff, implementing new or revising existing program protocols and procedures, or modeling other ways for staff to react in specific situations.

Managers and supervisors can use the specific tools in Appendix O or adapted versions of them when observing recruitment efforts, workshops, or in-person contacts between family support staff and program couples.

Protocols for Supervisory Sessions

Routine supervision of program staff provides a manager or supervisor with another opportunity to monitor the content, quantity, and quality of service delivery to participants. Supervisory sessions also provide an opportunity for program staff to identify areas in which they would like further support. When structuring a supervisory session and creating a protocol, programs should think about the goals of the supervision session, items to routinely check, and the format and frequency of supervision.

Identify Goals of Each Supervision Session

Supervisory protocols should summarize the main goals of supervisory meetings with staff. Monitoring staff work and providing technical assistance regarding cases, workshops, or outreach (for example, giving advice on creative ways to reengage nonparticipants) should be among the core goals for your supervisory meeting.

As you monitor the work of your staff, below is a list of items to routinely check. Your supervisory protocol should describe how you will monitor each of these items:
- workload
- level of engagement between the staff and program participants
- the number, types, reasons, and content of contacts
- action steps and the follow-up process for any action steps identified
- fidelity to program protocols

- efforts to remove barriers to program participation
- efforts regarding curriculum instruction/reinforcement
- data management system use

Protocols should include an agenda that prompts the supervisor to touch on each of the monitoring items described above. These protocols should also identify particular data management system reports and/or other program-developed forms supervisors should routinely use when monitoring these tasks.

Possible Formats for Supervision Sessions

Supervision protocols should also identify the different formats supervisory sessions will follow. Programs can consider the following five supervision formats and include descriptions of these in their protocol. An agenda for each format could also be included in this protocol. Protocols should also include any tools supervisors use when observing staff efforts (for example, office visits with couples) or review of case files of selected couples (described in more detail below):
- One-on-one meetings
- Group meetings (with staff from one program component)
- Team meetings with staff across program components
- Observations
- Role-playing

Frequency of Supervision Sessions

When describing the different formats used to supervise staff, programs should also clearly identify the frequency with which each of these supervisory efforts should be completed. For example, programs may decide to hold weekly one-on-one supervision sessions, biweekly group meetings, and observe two activities (workshops, family support visits, or outreach presentations) in person for each staff member. For many staff, it is important for one-on-one supervisory meetings to be held weekly.

b. *Case File Reviews*

Case file reviews help identify issues relating to the quality of data and training needs of program staff. Their uses include the following: (1) to further understand how staff use the data management system; (2) to ensure accuracy and completeness of data; (3) to learn about the flow of couples through program activities and why there may be gaps in staff follow-up on referrals, supportive service payments/incentives, contact with couples, and poor attendance in workshops and supplemental activities; and (4) to determine what type of extra monitoring or training would be valuable to help staff increase the quality of the data and/or the responsiveness of the program to its couples' needs.

A good rule of thumb is that each case should be formally reviewed by a supervisor at least once every month. Additionally, every new case should be reviewed to determine the level of need and the issues that need to be addressed immediately to ensure maximum participation and to identify couples' strengths. Your data management system can be used to select couples in advance and to identify any issues. Case file reviews are one tool that can be used to identify factors contributing to lack of performance and feed into a corrective action plan. An example of a case file review guide can be found in Appendix P.

FSCs may want to present each case on their caseload in supervisory meetings at the following critical points:
- enrollment into the program

- midpoint in core workshop sessions
- major changes in the couple's life situation
- graduation from core workshop sessions
- any other transition in the couple's involvement in the program

Preparation: Staff whose cases will be individually reviewed should gather the case files needed or a data management system report showing case notes, workshops and supplemental activities, referrals to supplemental services, supportive services payments, and additional contact notes for the couple.

Conducting the Case File Reviews with Staff: Ask the staff member(s) to walk through the details of each couple's experience. When staff describe each couple's experience, be sure to ask often, "Is this typical of your work in general?" In this way, the interview will be an opportunity to learn more general information about how staff work with couples, in addition to the specific details of the selected couples. If program managers or supervisors have changed key parts of program operations (such as allocation of incentives), ask staff how they have been implementing the revised procedures

c. Protocols for Soliciting Feedback from Couples

Collecting feedback from couples can also help programs improve services. Couples in the program have a unique perspective to share. In Appendix Q, we provide an example of a form program managers in one SHM program used to collect feedback from couples over the phone.

d. Structuring Program Protocols on Staff and Program Functions

Creating clear and concrete protocols that describe the specific ways in which program staff should conduct program activities will ensure a level of consistency in the delivery of program services across program staff (if implemented and monitored sufficiently) and will provide program staff with support and guidance when completing their day-to-day tasks and responsibilities. For example, see the family support protocol in Appendix E.

Appendix A: Acronym List

The following list can be used as a reference for acronyms commonly used in the SHM Toolkit.

ACF   Administration for Children and Families

BPP   Becoming Parents Program

DV   Domestic Violence

FSC   Family Support Coordinator

HHS   Health and Human Services

LCLC   Loving Couples Loving Children

PAIRS   Practical Applications for Intimate Relationship Skills

PSA   Public Service Announcement

QC   Quality Control

SHM   Supporting Healthy Marriage

TANF   Temporary Assistance for Needy Families

WOR   Within Our Reach

WIC   Women, Infants and Children

Appendix B: Overview of Relationship and Marriage Education Curricula Used by SHM

The 10 local SHM programs chose among existing relationship and marriage education curricula that were grounded in marital relationship research, had a track record, had been previously used in multiple settings, and covered as much as possible the range of topics included in the SHM program model, based on current research. The curricula had all been adapted for lower-income couples from earlier versions that were used with middle-class couples. Adaptations include the use of multiple learning approaches (for example, group discussion, individual couple activities, video demonstrations, role playing, and demonstrations by facilitators); the opportunity for skills practice during the workshops; and the use of content, examples, and video demonstrations designed to be relevant to a diverse group of couples.[1]

Within Our Reach (Adapted from Prevention and Relationship Enhancement Program, or PREP)
Developed by Drs. Scott Stanley and Howard Markman of the University of Denver, *Within our Reach* (WOR) is a variant of their earlier Prevention and Relationship Enhancement Program (PREP), a curriculum that is based on longitudinal relationship research and has shown positive effects on relationship quality or stability in earlier random assignment studies with middle-class couples. Used by the SHM programs in Wichita, Bethlehem, Reading, El Paso, and San Antonio, WOR is based on the same theoretical foundation that supported PREP but also includes new learning approaches and relationship insights from empirical work focused on economically disadvantaged and ethnically diverse populations. PREP takes a cognitive-behavioral approach to relationship and marriage education, focusing on helping couples modify their behavior and their thoughts about their relationship so as to reduce and better manage, negative moods and emotions. Also central to PREP's approach is its focus on different types of safety that it characterizes as essential to maintaining healthy relationships: safety in interaction (can talk openly about issues), personal safety (freedom from fear of harm), and safety in commitment (mutual support, teamwork, and a clear future together). (See Stanley and Markman, 2008.)

For Our Future, For Our Family (Adapted from Practical Application of Intimate Relationship Skills or PAIRS)
Lori Gordon, the marital and family therapist who developed the Practical Applications for Intimate Relationship Skills (PAIRS) program, drew from the extensive content of PAIRS to create the For Our Future, For Our Family (FOF) curriculum for the SHM target population. Used by the Orlando program, the objectives of PAIRS (and, thus, of FOF) are "to know and nurture oneself and one's partner, to enjoy differences rather than see them as a threat, and to learn to view one's relationship as an ongoing source of mutual pleasure." Within this framework, a relationship that is not satisfying is viewed as the result of implicit and explicit roles and expectations within the relationship. The curriculum emphasizes the importance of love and nurturance in helping couples to express their emotions honestly, as well as the effect of earlier experiences on self-esteem and current relationships. Hence, PAIRS places a major focus on "bonding," or developing emotional and physical closeness within the marital relationship (See Gordon, DeMaria, Haggerty, and Hayes, 2007).

Loving Couples, Loving Children (Adapted from Bringing Baby Home)
Used by SHM programs in the Bronx and Shoreline, Loving Couples, Loving Children (LCLC) is based on over 30 years of research conducted by John Gottman, a professor at the University of Washington. LCLC

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[1]For more information on how curricula were selected and adapted, see Knox and Fein (2009).

is organized around the belief that the underpinning of a healthy relationship is a strong friendship, indicated by positive emotions shared in nonconflict interactions. In addition, LCLC proposes a four-part process for problem-solving that includes gentle start-up of challenging conversations, accepting the validity of multiple perspectives, becoming skilled at repair and recovery conversations, and compromise. In LCLC workshops, couples are encouraged to share their hopes for themselves and their marriage and to explore the personal experiences that shaped their beliefs and expectations. By discovering and validating each spouse's values and dreams, the couple can reduce damaging interactions related to perpetual problems and build a sense of shared meaning and identity as a couple (See Shapiro and Gottman, 2005; http://www.LCLConline.org/curriculum.htm).

Becoming Parents Program (Adapted from an earlier version of Becoming Parents)
The Becoming Parents Program (BPP), developed by Pamela Jordan of the University of Washington, is a relationship and marriage education curriculum intended for couples expecting the birth of a child. The curriculum is used by the SHM programs in Seattle and Oklahoma and is based on the PREP curriculum described above, which contributes much of the curriculum's material on strengthening couple relationships. Different from PREP, however, is that BPP emphasizes "self-care," under the premise that in order to have a healthy relationship partners must also take care of themselves as individuals. In addition, BPP includes empirically based information about child development and parenting that is intended to help couples successfully co-parent and to reduce stress on the relationship introduced by the addition of a new child. In general, the knowledge and skills imparted in BPP are done so in the context of a new birth in the family and linked to parenting decisions (See Jordan, Stanley, Markman, 1999).

Appendix C: Evening Workshop Schedule

The following is a sample schedule for an evening SHM workshop. Though the agenda and timing depends on local circumstances, this sample can be used to help plan for the various tasks and activities necessary for executing a workshop.

4:30 – 5:15pm: Preworkshop Tasks

- A staff member sets up dinner items and snacks including coffee/beverages, plates, and utensils.

- A staff member prepares couples' name tags and sign-in sheets.

- Child care preparations are completed, as appropriate.

5:15 – 5:30pm: Couples Arrive

- A staff member greets couples and remains at the front desk to assist arriving couples as needed, makes sure couples sign in and pick up name tags and class materials, and directs them to child care (if available on site).

5:15 – 6:00pm: Dinner

- Couples eat dinner and socialize with one another and program staff.

6:00 – 7:00pm: Workshop

7:00 – 7:15pm: Break

- Snacks and beverages/coffee available.

- As couples return from break, support payments/incentives are distributed, as appropriate.

7:15 – 8:00pm: Workshop (continued)

8:00 – 8:15pm: Postworkshop Tasks

- A staff member assists couples in exiting workshop space.

- Staff clean up food, wash tables, and collect trash.

- Staff debrief about workshop and couple-specific issues that were presented and complete appropriate workshop paperwork.

Appendix D: Workshop Participant Feedback Form

The following form was developed for SHM programs to help ensure the quality of workshops and monitor areas for improvement. Couples in some sites fill out a feedback form after every session, asking how helpful couples found the information provided, how useful they found the format and teaching methods, and how they felt about the facilitator and other group members. This lets the program know what aspects of the workshops are working well and which aspects might need to be rethought or presented differently. It can also help monitor the quality of facilitation and group connection.

Name of Topic_____

Name of Facilitator_____

Date_____

Thank you for taking the time to answer these questions. Your answers are confidential and will help us make changes to the workshop materials to better meet your needs as a couple.

1. Looking back on this workshop, what did you like most?

2. Looking back on this workshop, what did you like least?

Please circle the number under each question that best measures how you feel.

1. Could you relate to the video (only if a video was shown)?

No, I couldn't relate at all.   Yes, I could relate to lots of things.

   1   2   3   4   5

2. How helpful was TODAY'S TOPIC to you and your relationship with your partner?

Not at all helpful   Very helpful

   1   2   3   4   5

3. How helpful was the INFORMATION GIVEN to you and your relationship with your partner?

Not at all helpful   Very helpful

    1   2   3   4   5

4. How helpful were the EXERCISES / ACTIVITIES to you and your relationship with your partner?

Not at all helpful   Very helpful

    1   2   3   4   5

5. Did you feel respected by the Workshop facilitator(s) during the discussion?

No, not at all respected   Yes, I felt very respected.

    1   2   3   4   5

6. Did you feel welcomed by the group?

No, not at all welcomed   Yes, I felt very welcomed.

    1   2   3   4   5

7. Did you participate in the group discussion?   ☐ Yes   ☐ No

---

COMMENTS – Please feel free to add any comments you think would clarify any of the answers you gave above or to share other information we did not ask about:

Appendix E: Family Support Meeting Protocols

Developed by the Family Expectations program in Oklahoma City, OK
Developed by the Together Project in Orlando, FL

The following are two examples of family support meeting protocols, developed by the Oklahoma City and Orlando SHM programs to ensure that their Family Support Coordinators (FSCs) consistently address the key goals of family support and provide high-quality services. The Oklahoma City guidelines review general elements of office visits and provide an outline for each visit. Note that the outline references exercises for couples and assessment tools for FSCs to complete that are not included here. Orlando's protocol details the content of the first family support visit. This program chose to develop similar outlines for each family support meeting.

FAMILY EXPECTATIONS FAMILY SUPPORT OFFICE VISIT GUIDELINES

PURPOSE: To ensure that Family Support Coordinators (FSCs) are provided with an adequate structure for completing office visits and for identifying family strengths and needs, making appropriate referrals, and customizing the program for each family throughout their participation in the program.

GENERAL ELEMENTS OF OFFICE VISITS

In general, elements of office visiting that should occur on a **regular basis** include basic family support and encouragement, assessment of needs and strengths, reinforcement of skills and concepts taught in workshop sessions, encouraging fathers' involvement and activities, provision of parenting information, and promotion of participation in supplemental activities.

1. **Basic Family Support and Encouragement**
   This includes providing emotional support to couples, modeling couple relationships, promoting communication and life-coping skill development, and linking couples to other needed community services. The FSC listens empathetically and nonjudgmentally to the individual and/or couple's concerns and frustrations. The FSC engages in problem-solving around these issues with the FSC supervisor. The FSC models problem-solving behaviors and activities and subsequently provides support and encourages the parents in accomplishing activities for themselves.

2. **Assessment of Needs and Strengths**
   This includes ongoing assessment of individuals' and couples' needs that may arise during any level of program involvement. The FSC regularly checks with both members of the couple during regular interactions and provides referrals based on needs identified. The FSC also uses the various activities that are completed during office visits as tools to assist in assessing their needs. Additionally, during all assessment activities and general conversations, FSCs are expected to identify the strengths of the couples and offer praise.

3. **Reinforcement of Workshop Skills and Concepts**

A primary goal of the FSC in the first weeks and months of program participation is to support and encourage the couple to attend Family Expectations workshops. During office visits, the worker also reinforces positive relationship techniques from concepts taught throughout the BPP Curriculum by modeling appropriate communication and relating couples' experiences back to the BPP Curriculum. FSCs are expected to ask the couple questions related to their understanding of the concepts and activities learned in workshops, their opinions of the material covered, and also about their efforts in practicing materials at home.

4. **Encouraging Fathers' Involvement and Activities**
Family Expectations attempts to engage fathers in services whenever possible, as our approach is couple-centered. FSCs are encouraged to conduct office visits when both parents can be present. FSCs are expected to provide referrals to fathers to promote participation in supplemental activities of interest to fathers, such as Daddy Boot Camp, Employment Workshops, etc.

5. **Provision of Parenting Information**
FSCs provide parenting information to couples on a regular basis during office visits. The parenting information provides useful tips for new and expectant parents.

6. **Promotion of Participation in Supplemental Services**
Family Expectations provides an array of opportunities for families to receive support services in a workshop setting throughout their involvement in Family Expectations, even after the conclusion of the BPP Curriculum.

STRUCTURE/CONTENT OF OFFICE VISITS

The following outlines the **general** sequence of office visits (structure and content). However, this sequence may be altered based on based on the couple's or programmatic needs.

Office Visit #1

- Provide Family Expectations program overview (workshops, supplemental activities, the FSC's role, leveling system, etc.)
- Discuss Incentives
- Needs Assessment
- Reinforcement of BPP Curriculum
- Provision of Referrals

Office Visit #2

- Complete Prepare/Enrich Inventory
- Reinforcement of BPP Curriculum
- Provision of Referrals

Office Visit #3

- Review Prepare/Enrich Inventory Results with Couple
- Reinforcement of BPP Curriculum
- Provision of Referrals

Office Visit #4

- Complete Goals Statement Form with Couple
- Complete Initial Goal Plan
- Complete Initial Case Level Review
- Reinforcement of BPP Curriculum
- Provision of Referrals

Office Visit #5

- Complete Value Questionnaire
- Complete Exercise: Couples Dreams
- Reinforcement of BPP Curriculum
- Provision of Referrals

Office Visit #6

- Complete Exercise: What I Care About
- Complete Exercise: Value Game
- Reinforcement of BPP Curriculum
- Provision of Referrals

Office Visits #6-15

For office visits #6-15, FSCs will use supervision time to determine the most appropriate exercises/activities, based on the couple's individual needs. The following exercises will be assigned as deemed appropriate:

- Reinforcement of BPP Curriculum
- Provision of Referrals
- Complete Couple Appreciation Game
- Complete Exercise: Food Triangle (if covered in class already)
- Complete Exercise: How Well Do You Know Your Partner
- Complete Exercise: Budget Plan (if covered in class already)
- Play "Ungame" Game
- Complete Second Goal Plan
- Complete Exercise: What Are Your Goals?
- Complete Second-Level Review
- Goal Plan Review
- Update Goal Plan

TOGETHER PROJECT FAMILY SUPPORT GUIDELINES: OFFICE VISIT #1

The purpose of the first visit is to orient the couple to the Together Project, set goals with the couple, and ensure that the Family Support Coordinator is gathering an assessment of couples' needs, linking them to appropriate community services, and reinforcing all aspects of the program. FSCs should be aware of any issues that should take precedence over the agenda and address those before proceeding with this outline.

- Welcome and Check-In
    1. It is essential to appreciate the couple for coming in considering their busy schedule.
    2. Ask couple how day/week is going.
    3. How are your child/children?
    4. Clarify questions couple may have.

- Introductions
    1. State your name and title.
    2. Verify their names and confirm that they don't like to be called anything different.

- Role of the FSC
    - The FSC will be the couple's point of contact throughout their participation in the program; therefore, the FSC will be available to answer questions, assist with individual needs, and confirm attendance and child care.
    - Reinforce tools and curriculum. We understand that sometimes finding time to practice the tools can be difficult, and when practicing the tools at home, it can be hard to stay within the structure of the tool, particularly when discussing a sensitive topic. Therefore, the FSC is there to spend individual time practicing with all couples.
    - Liaison between couple and community services

- Overview of Program
    1. Depending on couple's workshop day, describe length of program (6 or 12 weeks of workshop), frequency of FSC visits, and supplemental activities.
    2. Explain child care provider and give the couple directions.
    3. Remind the couple that food will be provided before workshops and for the children.
    4. This is an exciting opportunity for couples to have fun while spending quality time with their spouse.
    5. This is an opportunity to learn about Healthy Relationship Tools.
    6. Provide Welcome Package and describe why we chose each item.

- Getting to Know the Couple
    1. Anniversary date
    2. Ask about children, family structure/dynamic, living arrangements, etc.
    3. Inquire about current stressors, financial situation, transportation accommodations, and what support system they have.
    4. Ask couple: What are some highlights and pitfalls in your marriage? From this, the FSC should help couples identify three goals that the couple would like to work on.
    5. Confirm availability for workshops and office visits, which should include setting up a follow-up visit.

☐ NOTES:

_____

_____

☐ Questions/Comments/Concerns
  1. Recap what was accomplished in session
  2. Confirm follow-up session with couple
  3. Provide couple with referrals as needed.
  4. Confirm workshop attendance.
  5. Confirm attendance at any upcoming supplemental activities.

_____

_____

Appendix F: Family Support Curriculum Reinforcement Activities

Family Support Coordinators can use the following relationship skill-building activities, developed for SHM programs by Public Strategies, Inc., during one-on-one meetings with couples. The activities are intended to reinforce and provide an opportunity to practice topics from the core relationship and marriage education workshops, such as communication, managing conflict, friendship-building, managing stress, and problem-solving together. The developer of your program's curriculum may also be able to provide some exercises that are tailored specifically to reinforce the skills and ideas introduced in the curriculum, building on the workshops in your program.

Couples Minefield

Curricula Theme:

Communication and Problem-Solving

Objective:

Help couples to experience the importance of clear, regular communication.

Working on problems together as a team can strengthen their marriage.

Illustrate how clear communication helps to build trust and security.

Supplies:

- Balloons
- Small pieces of paper (paper needs to fit inside balloon)

Set-Up:

Before meeting with the couple, write out several situations that couples may encounter. Write the situations on small piece of paper (for example, transmission problems, $850.00 repair bill, mother-in-law very ill). Put each piece of paper inside a different balloon and blow up balloon. Have the couple walk around and randomly throw a balloon to them. They must pop the balloon and discuss and/or problem-solve the issue.

Debrief:

Discuss analogy of "minefield" and how it relates to relationships. Discuss importance of good communication and good problem-solving skills.

Optional:

Paper plates can be used instead of balloons if balloons are too disruptive. You can put a paper-plate trail for couple to follow and randomly stop couple at a plate. Situation is written on underside of plate; couple will read and discuss/problem-solve.

Twenty Questions: How Well Do You Know Your Partner?

This is a fun way for couples to connect and have discussions!

1. Name your partner's three closest friends.

2. What was the happiest time in your partner's life?

3. What was the greatest loss in your partner's life?

4. What is your partner most proud of?

5. What is your partner's favorite food?

6. What was your partner's favorite subject in elementary school?

7. Who was your partner's favorite teacher?

8. What was your partner's first impression of you?

9. What did your partner want to be when he/she grew up?

10. What is your partner's favorite movie?

11. What is your partner's favorite song?

12. What is your partner's favorite restaurant?

13. What is your partner's favorite drink?

14. What was your partner's favorite TV show as a teen?

15. What is your partner's biggest regret?

16. If your partner could choose his or her first name, what would it be?

17. What is the most influential book your partner has read?

18. What is your partner's idea of a perfect vacation?

19. What does your partner think is funny?

20. What has your partner accomplished that you are most proud of?

What Do We Control?

Curricula Theme:

Stress Management

Objective:

Many couples become frustrated and feel stress about things beyond their control. This exercise helps couples understand what things are in their "circle of control" and their "circle of worry." Couples will learn to identify things that concern them and things they can do something about versus those they can't.

Supplies:

- Pen or pencil
- Sheets or poster paper with picture of inner and outer circle

Set-Up:

In the large outer circle, have the couple write all the things they can think of that worry them. Examples could be money, baby's health, parents, job, education, weather, and so on. Leave the inner circle blank. After the circle is completed, guide the couple through a discussion about the things they have written and ask "Is this in your control or not?" "Is this something you should do something about now?" If there is something they can influence, move it into the circle of control. List ways they can influence things. The things that they can't control remain in the outer circle. Discuss with couple ways to let the things in the outer circle go. For example, I may list "child's health." While a couple is not able to control their child's health, they can move it into the circle of influence by listing things such as having regular medical check-ups, good diet, exercise, and sleep.

Debrief:

Discuss how recognizing the circle of worry and circle of control can help the couple manage stress. It helps the couple feel empowered by recognizing steps they can take to manage their lives and spending time on the things they can do something about instead of on the things they cannot influence.

Stop and Smell the Flowers

Curricula Theme:

Stress Management

Objective:

To see if what they identify as their values are congruent with how they spend their time.

Supplies:

Pen and/or pencil

Paper or poster board with daisy drawn on it. Be sure to have large blank center. Daisy should have 7 to 10 petals.

Set-Up:

Ask the couple to think about how they have spent their time the past two weeks. Fill in the petals with a description of what they did. For example, one petal may say "went to church," another may say "had dinner with neighbors." Continue to fill out each petal.

After petals are filled out, have couple discuss and write down in center of flower the values that are the most important to them. Ask couple to reflect on "petals" and discuss if the way they spend their time is congruent with what they say their values are.

Debrief:

Many people feel out of balance in their lives. The more the '"petals" are aligned with what the couple says they value, the more balanced they will feel. This will help couple discuss how to spend their time and live in alignment with what they value.

The Most Important Thing

Curricula Theme:

Values/Expectations

Objective:

To encourage couples to think about what is most important in their lives and set priorities according to their values.

Supplies:

- Ten sticky notes or small sheets of paper per person
- Pen or pencil

Set-Up:

Ask the couple to individually think about the most important things in their life. These should be things they feel they could not live without (but not things they need to physically survive like food and water). Ask each person to write one of these things on a piece of paper. After all 10 pieces of paper are filled out, instruct them that each must give up one thing and should lay it face up. They are to continue giving things up, placing the paper on top of each other until they are left with their most important thing. The stack of paper should now be in order of its importance.

Debrief:

Ask couple if their daily life reflects this order. Discuss priorities and how each perceives the other's priorities.

10% Stretch

Curricula Theme:

Financial/Budgeting

Objective:

To impress upon couples that no matter how well they are doing in following their budget or if they think they can't budget or save at all, they are probably capable of doing a little more or starting to save.

Supplies:

- 4 small pieces of masking tape

Set-Up:

Ask each partner to place a piece of tape as high as she or he can on the wall without jumping or standing on anything. Then ask each one to take the second piece of tape, extend their arm, and really stretch to try to reach even higher than the first piece of tape. (Note that any improvement here is significant.)

Illustration Story:

David and Sharon always seemed to struggle to make their money last until the next payday. They had really been trying to save some money for emergencies, like the car breaking down, vet bills when the dog gets sick, or the refrigerator needing repair. But somehow, they just never seemed to have enough to go around, let alone SAVE any! One thing they had been doing lately was to put only $10 of gas at a time in their car. And even though it didn't go into savings, it gave them a little more money on hand through the week. However, Sharon noticed one day that almost every time they stopped to get gas, they would also purchase a Slurpee and many times a candy bar. Sharon then realized they get gas at least twice a week! 4 Slurpees @ $1.50ea and 4 candy bars @ $1.25ea meant they were spending an additional $11.00 a week on additional purchases at the gas station. They decided instead to fill their car up on payday. David and Sharon now put $11.00 a week into savings. *Even when we think we're doing all we can, with just a little extra effort, we can usually do more.*

Discussion:

1. With the first piece of tape, did you believe you reached as high as you could?
2. What made the difference with the second piece of tape?
3. How does this apply to your finances/budget?
4. Where in your budget could you do something like David and Sharon?

Circles of Perspective

Curricula theme:

Communication: "validating/understanding your partner's perspective"

Problem-Solving: "empathizing with your partner's situation"

Objective:

To explore the possibility that our viewpoint depends on which side of the issue we are on. If we work to understand the other "opposing" viewpoint we can, at the very least, validate that perspective and, at best, discover new insights.

The point is that "there are two sides to every coin," and both perspectives have equal merit.

Supplies:

- A pen or pencil

Set-Up:

Have each partner hold a pen/pencil up in the air with the tip pointing at the ceiling and pretend to draw a circle on the ceiling, in a clockwise direction. Tell them to keep drawing the clockwise circle while looking up from the bottom.

Then say, "Now continue to draw the circle with its tip pointing at the ceiling and slowly bring the pen down a few inches at a time. Continue to draw the circle and lowering it until you are looking down on the tip of your pen." Ask them: "Now what direction is the pen moving?" It will be moving counterclockwise at this point.

Discussion:

1. When a problem comes up, whose perspective do we see very clearly?
2. Is it difficult at times to realize that there is another side to problem situations?
3. What can this exercise tell us about discussing situations where we have a different perspective or opinion from our partner?
4. What can the couple do in the future to improve on valuing each other's opinions/perspectives when they disagree?

Date Night

Curricula Theme:

Fun and Friendship

Objective:

To help couples intentionally schedule time and prioritize the fun and friendship in their marriage. Prompt the addition of new activities into the couple's routine of leisure activities to increase the number of new experiences they discover together as a couple.

Supplies:

- 12 index cards
- Scotch tape
- Pen or pencil
- Calendar

Set-Up:

- Separate partners and ask that they not share responses with their partner.
- Give each six index cards and a pen/pencil
  - On two cards write an activity you would like to do for fun with your spouse (nonsexual).
  - On two cards write something you think your partner would enjoy doing with you just for fun.
  - On one write something fun you have never tried before, but would like to try with your spouse.
  - On one write something fun you can do with your spouse for fun that doesn't cost anything…$0.00…free.
- Each activity is for the couple **only**…no kids, no friends, no family…on this date.
- Once finished, fold the cards twice and tape to hold in a tight square (no peeking).
- Shuffle the folded cards.
- Then, on the calendar, select one day per month to devote to rekindling FUN and friendship in your marriage…tape one folded card to each selected day.
- On the morning of your "FUN Day" open the card and do whatever the card instructs…be sure to schedule a walk together the evening of each "FUN Day" to reflect and talk as friends about your day together!

Discussion:

1. Is it important to maintain a strong friendship with your spouse? Why?
2. What does having fun together do for your marriage?
3. Why do we need to schedule fun?

Mirage

Curricula Theme:

Communication

Objective:

To become more aware of how we use different tools, such as verbal, nonverbal, and clarifying questions to convey messages in our communications with others.

Effective communication takes time and effort — miscommunication is easy!

Supplies:

- Four labeled envelopes containing one sheet of paper with two or three different geometric shapes on each page. (See examples below.)
- Envelope #1 is labeled "Words Only Facing Away from Partner"
- Envelope #2 is labeled "Words Only Facing Partner"
- Envelope #3 is labeled "Nonverbal (gestures) Only"
- Envelope #4 is labeled "Words, Gestures, and Clarifying Questions"

Set-Up:

- Partners sit on opposite sides of the room from each other to ensure that each cannot see what is on the other's paper.
- Partner one selects an envelope and describes for partner two what to draw on his or her sheet of paper, using only the communication tool assigned; the couple cannot interact beyond the instruction given on the front of the envelope.
- Partner two follows his or her partner's description exactly in order to replicate the drawing on the paper contained in the envelope.
- Once partner one is finished describing the picture, they compare pictures to see how close they came to the original.
- Switch roles and repeat exercise.

Discussion:

1. What did you learn from this exercise?
2. Why is it so hard sometimes to communicate what we mean to others?
3. Which way was easiest?
4. Which attempt was most accurate?

Examples:
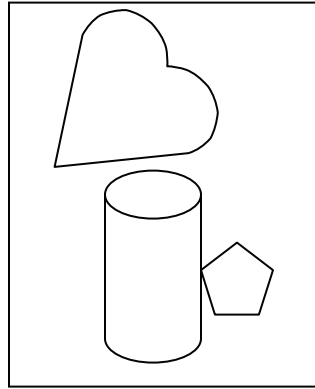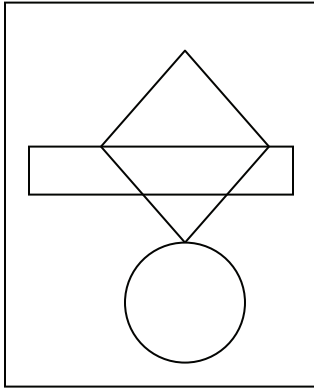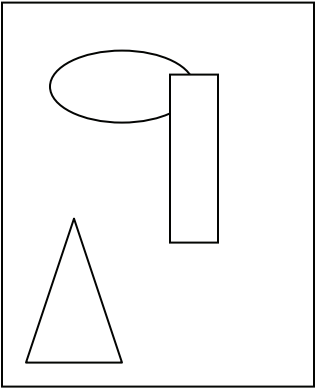
Paraphrase Ball

Curricula Theme:

Communication — Active Listening/Paraphrasing

Objective:

To practice paraphrasing potentially inflammatory statements without reacting to the negative emotions contained in the statement.

Supplies:

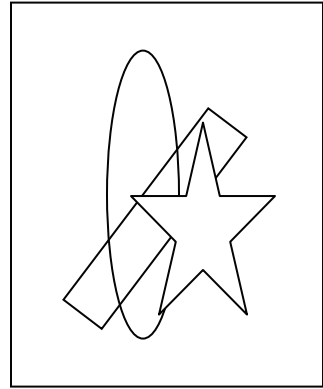One volleyball or soccer ball with statements taped randomly on the outside of ball.

Set-Up:

- Partners sit on opposite sides of the room from each other.
- Partner one *gently* tosses the ball to partner two, who reads the statement closest to his or her right thumb.
- Partner one then paraphrases the statement, trying to reflect in a positive way what their partner said…
- Repeat

Discussion:

1. What did you learn from this exercise?
2. What was most difficult?
3. How can paraphrasing be beneficial when you and your partner are having a disagreement?
4. Is there another situation where you think paraphrasing would be useful?
5. How might you use this with your children?

Paraphrase Ball Sample Statements:

I don't see why you have to go out again tonight. You've been out a lot lately.

I think you'd rather go hunting with your friends than be at home with me.

I wish you'd quit nagging me; I'll get it done when I have the time.

Kids should respect their parents by doing what they are told.

I don't why you are so hard on the kids; they're just children.

I'm sick and tired of you making decisions without talking to me first.

We need to do something about keeping the house neater. It's a mess most of the time and it's getting a little depressing.

I noticed the credit card bill is over $600 this month. I'm worried that we can't keep up.

You know we should save a lot more for retirement. I don't want to end up living in a two-bedroom apartment.

You spent $150. I thought we agreed on a budget, and here you go blowing it.

Why do you always let your mother interfere with our relationship?

I do your laundry and yet you can't even remember to pick up the dry cleaning.

We used to sit around for hours talking about things like politics or just life…Why don't we do that anymore?

Values Continuum

Curricula Theme:

Values and Expectations

Objective:

To gain insight and understanding of differing values and expectations that couples have within their own marriages. Highlight the need for couples to talk about their personal values and expectations in order to reduce potential conflict and increase marital satisfaction.

Supplies:

- 3 pieces of paper with the words "Strongly Agree," "Strongly Disagree," and "So-So"
- Roll of scotch tape
- List of values-based statements

Set-Up:

- On one wall, tape up the sign with "Strongly Agree"; on the opposite wall, "Strongly Disagree," and in the middle of the room, "So-So."
- Explain to the couple that this represents a continuum from 0 to 10, with 0 being "Strongly Disagree," 10 being "Strongly Agree," and 5 being "So-So," always remembering that all of the other numbers (1,2,3,4,6,7,8,9) are there, even though they are not represented.
- Have the couple listen to the statements you read and then walk to the spot in the continuum, 0-10, that best reflects how much they agree or disagree with the statement.

Discussion During Activity:

1. Have the couple discuss any statements where there is an obvious disparity in their values or expectations.
    - Where do those values/expectations come from?
2. How have opposing values/expectations provoked conflict in the past?
3. Or how could they cause conflict in the future if not discussed.

Values/Expectation-Based Statements:

Housework is women's work.	Marriage is important to children.
Clothes make the person.	Conflict equals a bad marriage.
Traditions are important.	Children bring us closer together.
If I earn the check, I can spend what I want.	Budgets provide money to buy things.

Discussion:

1. Where do we get our values/expectations?
2. Is understanding each other's values and expectations important? Why?
3. Do your values influence your marriage? How?
4. Can understanding your partner's values and expectations reduce conflict in your marriage?
5. How can this apply in other areas of your marriage?

Appendix G: Family Support Leveling System Guidelines

Developed by the Loving Families Program in Shoreline, WA
Developed by the Strong Families Program in Reading, PA

Programs can think about developing a "leveling system" to organize caseloads based on couples' needs and time in the program. "Leveling" refers to a method for classifying couples according to their level of need for family support services — a kind of triage — and then sets goals for the number and types of contacts FSCs should expect to make with couples in each level. These allow FSCs to effectively manage the number of couples served, while focusing on couples with the highest level of need. Two examples of leveling systems, developed by the Shoreline and Reading SHM programs, are outlined below.

LOVING FAMILIES LEVELING SYSTEM GUIDELINES

PURPOSE: To provide a clear system for Family Support Coordinators (FSCs) to measure/monitor couples' progress and ensure that couples receive the intensity of services they need. Each level outlines what service is expected to be delivered to each couple by the FSC and is assigned a numerical value. The maximum number of couples for one FSC may not exceed 50.

PROCEDURES:

1. Level 1 — Every couple who enters the Loving Families Program is placed on Level 1. FSCs working with couples on Level 1 will schedule and lead one family advocate visit every two weeks lasting for approximately one hour. FSCs will also contact couples by telephone once every other week or more. The couples remain on Level 1 for a minimum of two months and a minimum attendance of workshop session numbers 1-4 or until they have met the established criteria for movement to Level 2. FSCs at 80 percent of a full portfolio will not receive more than two new Level 1 families a week.

2. Level 2 — Couples are placed on Level 2 after being on the most intensive level (Level 1) for a minimum of two months or until they have met the criteria for promotion to Level 2. FSCs working with couples on Level 2 will schedule and lead one office visit every month, lasting approximately one hour, and a home visit if necessary. Additionally, FSCs are expected to make a minimum of one mid-month follow-up contact with the couple. The couple will remain on Level 2 for a minimum of three months until they have met the established criteria for movement to Level 3.

3. Level 3 — Couples are placed on Level 3 after completing all the criteria for Level 2 (as outlined in Level Change Form). An FSC working with a couple on Level 3 will schedule and lead one office visit per quarter lasting approximately one hour. Additionally, FSCs are expected to make one mid-quarter follow-up contact with the couple. The couple will remain on Level 3 until they have completed the program and have met the established criteria for graduation.

4. Level X — A couple is placed on Level X after the FSC has made multiple attempts to engage the couple via phone calls, office visits, creative outreach home visits, postcards, and letters, and the FSC has not received a response to these outreach and engagement attempts. Additionally, the couple may have dropped out of workshop attendance. Also, the couple may no longer be in a

relationship with each other. While couples are on Level X, FSCs make continued monthly and/or quarterly attempts to reengage the couple via phone calls, letters, postcards, and invitations to social events and booster groups every month and quarter. Every effort will be made to engage participants in the Loving Families program.

5. A review of the progress toward a level change should occur during family support supervision. A report will be generated by the family support manager with the names of couples due for level review. Families that do not meet established criteria for level promotion will remain on this Leveling Report until they have been promoted to the next level. The levels review should occur within the following time frames:

   ▪ Level 1 – Between 10-15 days prior to their second-month enrollment mark. If the couple is not ready for a level change by this date, the couple's case will be re-reviewed every 30 days from their original due date, until they are ready for movement to Level 2. This review should be documented in supervision notes and MIS.

   ▪ Level 2 – Between 10-15 days prior to completing three months on Level 2. If the couple is not ready for a level change by this date, the couple's case will be re-reviewed every 30 days from their due date, until they are ready for movement to Level 3. This review should be documented in supervision notes and MIS.

   ▪ Level 3 – Between 10-15 days prior to their due date for graduation. If the couple has not met the established criteria for graduation (as outlined in the Graduation Verification Form) or cannot meet the criteria prior to their expected graduation date, the couple will be noted as having completed the LF program (without graduating). If the couple is eligible for graduation, it will be documented accordingly. This review should be documented in supervision and MIS.

   ▪ Level X – These couples should be reviewed in supervision at least monthly and when necessary.

   ▪ Reverse Leveling: If an FSC and supervisor determine that a couple has needs that exceed the requirements of their current level, the supervisor may change the couple's level back to a higher contact level and will schedule a case review within one month of the change.

The couple's current level should be documented in the program database. The family support manager will make database updates to assure these changes are reflected within 48 hours.

FSCs will communicate the changes in level to couples by previewing what couples can expect in each new phase of the program, focusing on couples' strengths and accomplishments, and framing the change from twice monthly to once a month to quarterly meetings as the couple's option and choice. A couple may choose to continue to meet with the FSC more than once a month or more than quarterly, based on the couple's experience of success in setting goals and completing curriculum-based work.

STRONG FAMILIES LEVELING SYSTEM GUIDELINES

Level 1: For couples just entering the program, who need intensive assistance and/or are in crisis

FSC (Family Support Coordinator) duties when a couple is at Level 1:
- FSC will have minimum of two home visits with the couple per month. Level 1 usually lasts three months for most families.
- FSC will call the couple once a week to check in. FSC will have two phone contacts that are more in depth than check-in per month for a total of a minimum of four contacts per month.
- FSC will address any environmental stress issues, such as employment and education.
- FSC will connect the couple with community resources as needed.
- FSC will problem-solve with the couple to address barriers to participation in workshops and supplemental activities.
- FSC will reinforce the curriculum skills taught.
- FSC will document home visits and phone contacts.
- FSC will participate in weekly supervision to discuss the couple's progress.

Criteria for transitioning from Level 1 to Level 2:
- The couple has maintained stability in their relationship with no crises arising for 30 days or has responded appropriately to crises with or without their FSC's assistance.
- The couple is using the Speaker/Listener technique effectively most of the time.
- The couple is planning and enjoying activities as a couple at least once a week.
- The couple has been in attendance to the MEGs with at least a 65 percent attendance rate.
- The couple has kept FSC home visit appointments or has called ahead to reschedule at least 75 percent of the time.
- The couple has identified at least one other support person for their family besides the FSC.

Level 2: For couples requiring moderate help who have been involved in the program for at least two months

FSC duties when a couple is at Level 2:
- FSC will make one home visit per month with Level 2 couples. Many couples will remain at Level 2 for three months.
- FSC will make one mid-month check-in call, for a minimum of two contacts per month.
- FSC will reinforce curriculum skills.
- FSC will continue to make appropriate community referrals.
- FSC will continue to document home visits and phone calls.

Criteria for transitioning From Level 2 to Level 3:
- The couple has maintained stability in their family with no crises for 30 days or has responded appropriately without the help of their FSC.
- The couple uses their identified support person other than their FSC.
- The couple demonstrates effective problem-solving skills in most situations.
- The couple has established goals and has made strides to achieve those goals.

Level 3: For couples needing check-in calls and little assistance/intervention

FSC duties to couples in Level 3:
- FSC will make one home visit per month with Level 3 couples. Most couples will remain in Level 3 for the remainder of their time with the program.
- FSC will make one mid-month check-in call.
- FSC will continue to reinforce curriculum skills.
- FSC will continue to document home visits and phone calls.

Appendix H: Marketing Materials from SHM Programs
Developed by Public Strategies, Inc., used by the HOME program in El Paso, TX
Developed by The Together Project in Orlando, Florida

HOME

Healthy Opportunities for Marriage Enrichment

A Program for Married Couples

A healthy marriage is the strongest foundation for your happy family!

HOME

Healthy Opportunities for Marriage Enrichment

Call today!

CENTER FOR CHILDREN
EL PASO

915-772-4170

1155 Westmoreland Drive, Suite 209
El Paso, TX 79925
www.epccinc.org

HOME
HEALTHY OPPORTUNITIES FOR MARRIAGE ENRICHMENT

FAQs

FREE

What happens at HOME?
- Spend time together as a couple
- Focus on your relationship
- Gain child-raising skills

Do we have to talk about our relationship?
Only if you want to. Some couples talk while others just listen and learn.

Is transportation or childcare available?
Yes. Ask for details.

There's nothing wrong with our marriage, so why go?
To keep your marriage great!

Celebrate success

HOME

Want to have a GREAT MARRIAGE? Then come to HOME

Explore ways to...

- Talk about tough topics
- Listen and be heard
- Manage stress
- Handle conflict
- Cope with the kids
- Have fun together as a family

HOME

It's FREE!

You may be eligible to participate if you are:

- Age 18 or over
- Married
- Parents

Families are important to HOME. We want to get to know you and support you as you build a solid foundation for your marriage and family.

Supporting Healthy Marriage

The number of participants is limited – call today to find out how to get your place in the program!

HOME

is a program that offers...

- A fun and interactive way to strengthen your marriage
- A relaxed place to meet other couples just like you
- Support to maintain a healthy marriage and build a strong family
- Information about other valuable programs and services

A happy family is worth celebrating!

HOME
HEALTHY OPPORTUNITIES FOR MARRIAGE ENRICHMENT

Are You Married with Children?

Then join the Together Project

We Give You →
FREE Time Together
FREE Child Care
FREE Food

Learn Tips to →
Have fun as a couple
Listen and be heard
Manage stress
Handle conflict
Cope with the kids

Supporting Healthy Marriage

(407) 823-1748

UCF

Appendix I: Sample Incentive Plan

This table presents one way to think about structuring an SHM incentive plan. This is meant to provide an example. Each program will need to determine the appropriate amounts and types of incentives, while ensuring that incentives do not grow too large, but remain "modest and symbolic." You will note that:

- Incentives are outlined as a cost per week per couple or as a cost per workshop group. This is helpful for budgeting as well as for program management, so that staff can purchase all necessarily incentives well in advance of the workshop or event.
- The plan includes a combination of incentives per couple, as well as raffles and giveaways for the whole group.
- The plan includes incentives for follow-up activities as a way to keep couples engaged after the marriage education workshops end.

Additional ideas for your incentive program:
- As an alternative to offering an incentive to each couple every week of the workshops, offer couples the opportunity to accrue points or credits for each marriage education session and workshop they attend, redeemable at intervals for different items.
- Your program could consider having a small "store" where couples can redeem their points for couple-related or family-related items.
- Raffles of prizes at some or all education sessions and supplemental marriage activities can also help programs stretch their incentive dollars.
- Donations from local businesses can also help augment the type and number of incentives and are a nice way to get them involved in your program.

Sample Incentive Plan

Milestone	Participant Support (per couple)		Raffles and Prizes (one per workshop group)	
	Sample Incentive $ Value	Incentive (Curriculum Reinforcement)	Sample $Value	Item Given
Week 1: Introduction, Identifying your strengths as a couple	$25	Family Memories pack with a disposable camera, picture frame, and certificate for film development		
Week 2: Dealing with conflict	$10	A journal for each member of a couple	$100	Date Night Raffle: Cash for child care for the evening, and discount certificate for a local restaurant
Week 3: Planning fun couple-time activities	$50	Cash and a discount certificate for a local restaurant		
Week 4: Dealing with stress				
Week 5: Family budgeting and menu planning	$25	$25 gift certificate for a local grocery store	$75	Family Night Raffle: A basket containing goodies for a fun night in with family (depending on age of children), a board game, markers and coloring books, a discount certificate for pizza
Week 6: Social support	$5	A box of blank "friendship" greeting cards		
Week 7: Family fun	$50	Gift certificate for a local retail store		
Week 8: Co-parenting and parenting stress	$20	Gift certificate for a toy store		
Week 9: Acceptance and appreciation of one another			$60	2 $30 gift certificates for a local florist (one to each member of a couple)
Week 10: Wrap-up	$50	Target gift card at completion of course		

Supplemental Marriage Education Activities	Sample Incentive $ Value	Participant Support (per couple)	Sample $Value	Raffles and Prizes (one per workshop group)
5-8 Weeks			$100	Family Day Out Raffle: Cash for a day at a local attraction, such as an amusement park, skating rink, bowling alley, or children's museum, and a discount certificate for a local restaurant
6 months	$10	Child safety kit for the home		
9 months	$25	Cash and a discount certificate for a local pizza parlor		
12 months	$10	Scrapbook or photo album for collecting family memories		
Totals (ME sessions and Supplemental Activities)	$305/ couple		$335/ workshop group	

OTHER INCENTIVES:
Personal Milestone Gifts

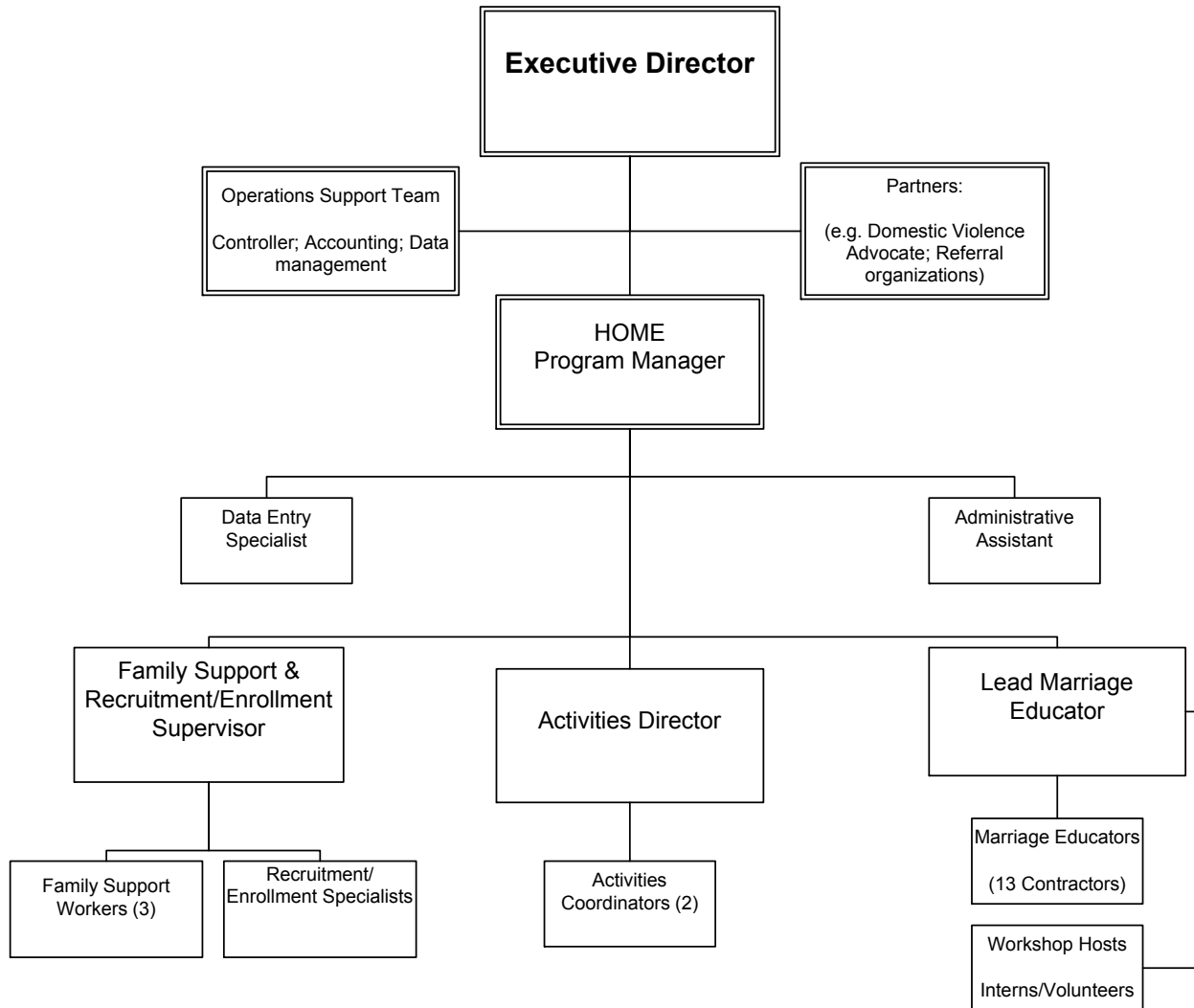| Event	Description	Sample $Value of Gift
Anniversary	Given to couples by FSC to acknowledge and celebrate their anniversary: might be flowers or a small gift for their home	$20/couple/year

Appendix J: SHM Program Organizational Structure

Below is a sample organizational chart based on the chart developed by the San Antonio SHM program. Staffing configurations will vary by program, but this example may be useful in considering options for staff positions and supervisory structures.

```
                          ┌─────────────────────┐
                          │  Executive Director │
                          └─────────────────────┘
┌──────────────────────┐            │            ┌──────────────────────┐
│ Operations Support   │            │            │ Partners:            │
│ Team                 │            │            │ (e.g. Domestic       │
│ Controller;          │            │            │ Violence Advocate;   │
│ Accounting; Data     │            │            │ Referral             │
│ management           │            │            │ organizations)       │
└──────────────────────┘            │            └──────────────────────┘
                          ┌─────────────────────┐
                          │  HOME               │
                          │  Program Manager    │
                          └─────────────────────┘
```

Executive Director

Operations Support Team

Controller; Accounting; Data management

Partners:

(e.g. Domestic Violence Advocate; Referral organizations)

HOME
Program Manager

Data Entry
Specialist

Administrative
Assistant

Family Support &
Recruitment/Enrollment
Supervisor

Activities Director

Lead Marriage
Educator

Family Support
Workers (3)

Recruitment/
Enrollment Specialists

Activities
Coordinators (2)

Marriage Educators

(13 Contractors)

Workshop Hosts

Interns/Volunteers

Appendix K: Sample Job Description
Developed by the Loving Families Program in Shoreline, WA

The following job description was developed by the Shoreline SHM program to hire a bilingual Family Support Coordinator.

Center for Human Services

Job Announcement

Bilingual Family Support Coordinator

GENERAL DESCRIPTION

The Family Support Coordinator (FSC) will provide participant support to couples enrolled in the Loving Families Program at the Center for Human Services (CHS) in English and Spanish. CHS is one of ten programs in the country participating in the Supporting Healthy Marriage (SHM) Research Project. This is the first national, large-scale evaluation of marriage education and skills programs to benefit economically disadvantaged married couples and their children.

FSCs reinforce the core goals of the research project through Family Support and Supplemental Services. Each FSC will work with couples assigned to their portfolio and engage them through face-to-face contacts, phone calls and at groups. FSCs are the 'glue' of the Loving Families Program. This work is labor intensive and focused on building relationships with both members of the couple. This non-exempt position reports to the Clinical Manager. Men, bi-lingual (Spanish/English), and bi-cultural candidates are strongly encouraged to apply. This position is for the time period of April 2008 to September 2010 or until the research project is completed.

Loving Families is a new project of the Center for Human Services (CHS). It is a relationship strengthening program for married couples with children who are economically disadvantaged. Loving Families is a voluntary, strengths-based and culturally relevant program.

MAJOR RESPONSIBILITIES

- Provides all services utilizing a strengths-based, family-focused and integrated approach
- Provides services in a culturally competent manner
- Manages a portfolio of at least 33 couples at a time
- Provides support to couples by meeting on a monthly basis with couples, making referrals, helping to arrange childcare and transportation.

- Reinforces curriculum messages and skills to couples
- Utilizes software to document interaction with couples, enter attendance data and case notes regarding couples
- Attends staff meetings, supervision, and case conferencing
- Participates in creating and maintaining a workplace that values diversity and treats everyone with respect without regard to race, color, age, religion, creed, gender, sexual orientation, national origin, marital status, the presence of any sensory, mental, or physical disability
- Demonstrates teamwork and open communication
- Provides services in a manner that expedites the meeting of contract requirements and program outcomes
- Maintains documentation in a timely, thorough and accurate manner
- Follows agency policies and procedures, RCWs, WACs, and other external regulations
- Follows CHS's Code of Ethics
- Performs other appropriate tasks related to your professional role as needed

MINIMUM REQUIREMENTS

- Commitment to confronting racism, sexism, heterosexism, and other discriminatory practices
- Experience and demonstrated ability to successfully work within a diverse cultural setting and provide culturally competent services
- Ability to work cooperatively as part of a team
- Prompt and consistent attendance during scheduled working hours
- Fluency in English and Spanish
- Two years of experience working with families living on a reduced income
- Bachelor's degree in Social Work, Human Services or equivalent degree
- Strong written and oral communication skills
- Computer literacy; knowledge of Microsoft Office, Excel and Outlook
- Willingness to submit to and pass a criminal background check
- Current Washington State Driver's license and reliable transportation
- Ability to work in an unstructured and unpredictable setting, ability to adapt to change
- Sense of humor

LOCATION

This position is located within the Loving Families Program at the Center for Human Services Northshore (18414-103rd Ave. NE. Bothell, WA 98011).

SALARY

This is a non-exempt position. 40 hours per week. Applicants should expect to work some evenings and weekends as required. $X/ hour plus benefits. This position is for the time period of April 2008 to September 2010 or until the research project is completed.

APPLICATION PROCEDURE

Submit cover letter and resume electronically to _____ and reference job #_____.

CHS is an Equal Opportunity Employer

The mission of the Center for Human Services is to strengthen the community through counseling, education and support to children, youth, adults and families in North King County and South Snohomish County.

Our Values: Embrace diversity, provide accessibility, champion collaboration, demand accountability, personify integrity, and to have fun.

Appendix L: Interview Role-Playing Activities

Interviews are an opportunity to screen for specific skills the open position requires. Having the candidate role-play through activities he or she would be expected to perform is one common strategy recruiters can use to screen for particular skills. The following are sample role-playing activities.

- Outreach worker candidate: Have the candidate come prepared to do a mock outreach with a couple. Staff can role-play a couple. You should pay particular attention to how the candidate pitches the program, interacts with the couple, and responds to any questions the couple asks. You should also pay close attention to her or his body language, communication style, and interpersonal skills.

- Facilitator candidate: Have the candidate come prepared to give a 15-minute presentation on a pre-identified section of a curriculum module. The section identified should include a facilitation piece (taken from an information section of the module) and an interactive piece (taken from an activity section of the module). The interactive piece should be set up so that the candidate interacts with a role-playing couple.

- Family support coordinator candidate: Have the candidate come prepared to run a curriculum-based activity with a role-playing couple.

- Program supervisor and/or family support candidate: Present a fictional problem case (for example, a couple that is hard to engage in the program) and have the candidate talk through how he or she would work with staff to respond to the problem case.

If recruiting for a bilingual candidate, candidates should be asked to run through the interview activity both in English and Spanish, or the general interview should be conducted both in English and Spanish. Also, if you are recruiting for a position that will fulfill multiple roles, the candidate should run through activities appropriate for each during the interview.

Appendix M: Scenario-Based Interview Questions

Asking interview questions that create a specific scenario for the candidate to respond to is one way to identify qualities and strengths in a candidate. The following are examples of scenario-based interview questions.

Outreach worker candidate:
- *Scenario:* You are recruiting at a local referral partner office (for example, a WIC clinic). Both spouses are present but seem distracted by competing demands: their two children waiting with them and the forms they need to complete before their appointment. Describe the approach you would use to recruit this couple.

- *Scenario*: You are trying to contact a couple whom you met at a referral partner office two weeks ago. The initial contact you made was with the wife, who seemed really interested in the program and said that she would speak with her husband about it. You have made three additional phone calls to the couple's home over the past two weeks to schedule an intake appointment. Because you have only been able to speak to the wife all three times, you have been unable to schedule a time for the couple to come in for intake. Describe the approach you would use to recruit this couple.

Facilitator candidate:
- *Scenario:* You are co-facilitating a workshop of five couples. The learning process in these groups relies heavily on dynamic group discussion. One spouse seems to dominate the discussion while others seem to be very quiet. How do you respond?

- *Scenario:* You are co-facilitating a workshop. One couple seems to be having a harder time than the others grasping a core skill being taught in the workshop. How do you respond?

Family Support Coordinator candidate:
- *Scenario:* You are having your third formal meeting with a couple. They have regularly attended their workshop sessions. Although each spouse has particular needs they would like your help addressing, you have been unable to engage the husband in your meetings. The wife participates in these meetings, while the husband stays quiet. As a result, your support has mainly been directed toward the wife and her identified needs and goals. What would you do to engage the husband in these meetings?

- *Scenario:* Your supervisor has assigned a new couple to your caseload. After a few formal meetings with the couple, they have shared several needs they would like your help addressing: The wife is unemployed and would like assistance finding a job. The husband has a serious credit issue due to identify theft and is therefore unable to take out a loan to purchase a used car, a resource the family needs. The couple has been unable to pay their electricity bill for four months in a row and now runs the risk of having it shut off. How would you respond to these competing issues when working with the couple and how would you balance these efforts with the demands of the other couples in your caseload?

Program supervisor:

- *Scenario:* One of the recruiters you supervise is constantly confronted with couples in the referral partner's offices who seem too busy with other things to listen to his recruitment pitch. What guidance would you give the recruiter?

- *Scenario:* One of the facilitator pairs you supervise is having trouble balancing the needs of a couple who normally has a harder time grasping the concepts taught in class with the needs of the other couples in the group. What guidance would you give the facilitator pair?

- *Scenario:* One of the family support coordinators you supervise is having trouble engaging one of the husbands she works with. The couple has regularly attended their workshop sessions. Although each spouse has particular needs they would like the FSC's help addressing, the FSC has been unable to engage the husband in her meetings. The wife participates in these meetings, while the husband stays quiet. As a result, the FSC's support has been directed mainly toward the wife and her identified needs and goals. Your FSC comes to you for guidance. What would you suggest the FSC do to engage the husband in these meetings?

- *Scenario:* You are observing a meeting between a family support coordinator and a couple. The couple shares several needs with him: The wife would like help finding employment. The husband has a credit issue because of missed car payments. The couple also wants to find after-school programs for their teenage children. The family support coordinator tells the couple that he will review "their case management needs" with his supervisor and create an action plan for the couple to start tackling these needs. How would you help this family support coordinator tailor his approach to make it more appropriate for SHM?

- *Scenario:* You supervise three family support coordinators, each of whom has 40 couples in their caseload. The caseloads include a mix of higher- and lower-needs couples. Protocol requires that you review each case at least once every month. How would you structure these reviews to ensure that you meet this minimum requirement, but also meet the need to review cases of couples who need more direct supervision?

- *Scenario:* As a supervisor, you most likely will observe your staff providing program services to couples. For example, as workshop supervisor, you most likely will observe a subset of the workshops your facilitators lead. During one of these observations, you observe that one of the facilitators does not seem to be as familiar with the curriculum content as he should be. You also observe that the facilitator pair does not seem to work well together. They often interrupt each other and each tries to monopolize the conversation. How would you structure your feedback to this facilitator team and to the individual facilitators during next week's scheduled supervisory meeting?

Appendix N: Sample Chart of Training Topics for New and Existing Staff

The chart below lists the range of topics that are important to every staff person's initial training. The chart lists both topics important to all staff regardless of their position and more specialized training topics that might only be relevant to a subset of program staff. Program managers and supervisors can build from this chart to frame their initial training agendas for newly hired staff.

Topic	Suggested Training Tools	Staff To Be Trained (required & optional)	Training Date	Trainer	Training Completed
Program overview:	Program operations manual	All project staff required			
▪ Agency mission and how SHM fits into and supports this mission	Agency Web site				
▪ SHM program overview and guiding principles	Agency organizational chart				
▪ Community partners	Emergency safety procedures				
▪ Agency policies and procedures	Agency protocol and procedures (based on local and state laws)				
	SHM Toolkit Section II				
Recruitment	Recruitment protocols developed by program	Required ➢ Program Manager ➢ Recruitment & Intake Supervisor ➢ Recruitment Staff Optional ➢ All other staff			
	Marketing materials (See Appendix H)				
	Suggested scripts/marketing pitches				
	List of agencies/org. where eligible couples are served				
	SHM Toolkit Section IV and VII				

Topic	Suggested Training Tools	Staff To Be Trained (required & optional)	Training Date	Trainer	Training Completed
Eligibility screening and intake process	Domestic violence protocol (developed with support from local domestic violence advocate) SHM Toolkit Section VIII	Required ➢ Program Manager ➢ Recruitment & Intake Supervisor ➢ Recruitment Staff Optional ➢ All other staff			
Supervision	Supervisory protocols SHM Toolkit Section XII	Required ➢ Program Manager ➢ Supervisors of each program component			
Family support: ▪ Agency/SHM approach to case management ▪ Strengths-based model	Family Support Meeting Guide and Family Support Leveling System Protocol (See Appendixes E & G) Curriculum reinforcement activities (See Appendix F) Incentive/participant support guidelines (See Appendix I) Strengths-based support guidelines SHM Toolkit Section IV Domestic violence protocol (developed with support from local domestic violence advocate)	Required ➢ Program Manager ➢ Family Support Supervisor ➢ FSCs			

Topic	Suggested Training Tools	Staff To Be Trained (required & optional)	Training Date	Trainer	Training Completed
Domestic (intimate partner) violence: ▪ Identifying and reporting DV ▪ Handling couples who disclose DV ▪ Referring to outside services	Local domestic violence advocate training	All project staff required			
	Domestic violence protocol (developed with support from local domestic violence advocate)				
Curriculum and workshops	Curriculum developer training	All staff required for curriculum developer training			
	Facilitation skills training				
	Policies and procedures for operating workshops	Workshop Supervisor & Facilitators required for all other items			
	Marriage Education Workshop Participant Feedback Form (See Appendix D)				
	SHM Toolkit Section III				
Supplemental activities	Curriculum developer training (if needed)	Required ➤ Program Manager ➤ Supplemental Activity Supervisor ➤ Supplemental Activity Facilitators			
	SHM Toolkit Section V				

Appendix O: Sample Observation Guides for SHM Activities

Observing SHM activities provides a manager or supervisor with an opportunity to focus on the content and quality of services. Managers and supervisors can use the specific tools below or adapted versions of them when observing recruitment efforts, workshops, or in-person contacts between family support staff and program couples.

Outreach/Recruitment Observation

Instructions: This tool is intended to help managers or supervisors document observations during and immediately after observing interactions between an outreach worker and a potential SHM couple.

Observer name	
Staff name(s) and title(s)	
Date and time of observation	
Location of observation	

Points for observation:

1.   In what location/environments did outreach/recruitment activities take place? *Check one*:

     ☐ On site

     ☐ Off site at referral agency

     ☐ Other (*indicate location*) _____

2.   Who was present during the observed outreach/recruitment effort?

     ☐ Both members of the couple present

     ☐ Just the wife

     ☐ Just the husband

 3.   ☐ Y ☐ N Did the couple/wife/husband seem to have previous knowledge of or contact with the program?

         How did the outreach worker begin the conversation about SHM with the couple/wife/husband?

         What materials were provided to the couple/wife/husband to help explain the SHM program?

4.   ☐ Y ☐ N Did the outreach worker make it clear the program was for low-income married couples?

If yes, how?

5. ☐ Y ☐ N The worker made it clear the program was about improving their marriage.

6. ☐ Y ☐ N The outreach worker outlined the benefits of participating in SHM to the couple/wife/husband (for example, an opportunity to learn skills that can strengthen their marriage, a chance to meet and interact with couples just like them, time away from children, a "date night," etc.).

8. ☐ Y ☐ N The outreach worker conveyed enthusiasm about the program.

9. ☐ Y ☐ N The outreach worker interacted with the couple/wife/husband in a manner that communicated that SHM is a program that cares about people.

10. ☐ Y ☐ N Did the outreach worker ask the couple/wife/husband questions to assess their interest in the program and their potential hesitations/objections to participating?

11. ☐ Y ☐ N If the couple wasn't eligible or said they weren't interested, did the outreach worker ask them if they knew others who might be interested and invite them to take a brochure or other materials?

12. ☐ Y ☐ N *If the outreach worker met with only the wife or husband, did the worker:*

> Make an effort to understand whether the other partner would be interested and available?

13 ☐ Y ☐ N *If the outreach worker met with only the wife or husband, did the worker:*

> Establish clear follow-up steps for contacting/engaging the other spouse?

14. ☐ Y ☐ N If the couple/wife/husband asked any questions about the program, the worker's response was appropriate.

15. ☐ Y ☐ N Was the outreach worker able to start the intake process with the couple during this meeting?

16. ☐ Y ☐ N If the intake process was started, was this done in a setting that protected the confidentiality of the person/couple?

17. ☐ Y ☐ N The outreach worker clearly explained to the couple/wife/husband what the next steps are for completing the intake process.

18 ☐ Y ☐ N Did the worker set up an appointment for intake?

19. ☐ Y ☐ N The worker left the meeting with a clear follow-up plan and timeline.

20. ☐ Y ☐ N The worker left the meeting with the couple's complete contact information.

21. ☐ Y ☐ N Overall, the interaction between the recruitment worker and the couple generated enthusiasm for the program and encouraged participation in the program.

22. ☐ Y ☐ N The worker was comfortable talking with the couple/wife/husband.

Overall reaction/summary of the observation:

Note any concerns about the meeting you observed.

Note types of TA the worker might need to address these concerns or improve his or her work with couples and/or with individuals.

Workshop Observation

Instructions: *This tool is intended to help managers or supervisors document their observations after observing a workshop, noting anything that supports or impedes the likelihood of couples benefiting from the workshop. Managers should request a copy of the facilitator material that will be used in the workshop.*

GENERAL INFORMATION

Name of observer	
Workshop facilitator names	
Curriculum topic(s) covered in observed session	
Session number in the series (e.g., 3rd of 8 meetings)	
Language used in workshop	
# of couples enrolled in the workshop	
# of couples who attended	
Is this attendance level typical for this workshop?	

LEARNING SPACE AND WORKSHOP LOGISTICS

1. ☐ Y ☐ N   Did the arrangement of the room allow for easy viewing and use of curriculum videos and/or other materials relevant to the session?

2. ☐ Y ☐ N Did the facilitators place themselves where they could be seen by all of the participants and where they seemed to be part of the group?

3. ☐ Y ☐ N   Did the facilitators use the prescribed materials to teach the module (for example, videos, PowerPoint presentations, discussions, facilitators' presentation or instruction, notes, materials for couples' skill exercises)?

4. ☐ Y ☐ N   Were there any problems or delays related to setting up the technical equipment and materials?

    If so, how were these issues resolved?

CURRICULUM CONTENT

5. What did the facilitators identify as the core lesson(s) to be learned?
6. At what point during the workshop did this occur?
7. ☐ Y ☐ N   Did the pacing of the curriculum content seem appropriate?
8. ☐ Y ☐ N   Did the facilitators present the curriculum content clearly?
9. ☐ Y ☐ N   Did the facilitators cover what was in the curriculum?
    If no, what was not covered?

10. ☐ Y ☐ N   Did the facilitators adequately respond if the workshop got off track (for example, many participants were not contributing to the discussions or were talking about subjects not pertaining to the topic of the workshop, or couples were not carrying out the skill practice exercises)?

FACILITATION

11. ☐ Y ☐ N   Did the facilitators appear confident intheir ability to present the curriculum material and manage the group?
12. ☐ Y ☐ N   Did the facilitators show respect for differing opinions?
13. ☐ Y ☐ N   Did you observe examples of the facilitators drawing connections between curriculum content and couples' real world experiences?
14. ☐ Y ☐ N   Did the facilitators strike a good balance between encouraging communication and moving discussions toward the goals of the module?
15. ☐ Y ☐ N   Did the facilitators acknowledge cultural differences and/or values?
16. ☐ Y ☐ N   Did the facilitators work well as a team?

COUPLE ENGAGEMENT

17. ☐ Y ☐ N   Did group members appear engaged with each other?

 Things to look for when assessing this:

☐ showed interest in each other's lives
☐ interacted with one another
☐ made references to enjoying each other's company
☐ smiled, laughed, offered supportive feedback
☐ talked together during breaks and/or before and after the session

18. ☐ Y ☐ N   Were most couples engaged in the workshop throughout the session?

If not, during what sections of the workshop was there a lack of engagement?

Were there factors that might explain the couples' lack of engagement?

19. ☐ Y ☐ N   Was there any evidence that some couples were bored, confused, or disinterested?

    If yes, check all that apply:

    ☐ appeared isolated
    ☐ talked in subgroups
    ☐ slept, looked bored
    ☐ looked confused
    ☐ read unrelated material
    ☐ didn't contribute to discussions.

20. ☐ Y ☐ N   Did the majority of couples seem engaged in the session and responsive to what was occurring at least 50 percent of the time?

21. ☐ Y ☐ N   Were there opportunities for couples to listen to and learn from each other?

22. Was the ratio of "facilitator talk" to talking by participants appropriate to this curriculum?

COUPLE LEARNING

23. ☐ Y ☐ N   Did couples have any "homework activities" to review skills from the prior session or prepare for this workshop?

    If yes, how did the facilitators assess couples' experiences with the homework?

24. ☐ Y ☐ N   Did facilitators assess whether or not participants understood the key points of the curriculum that were presented?

25. ☐ Y ☐ N   Was there any review of skills or concepts from previous sessions?

26. ☐ Y ☐ N   Did couples demonstrate that they had learned the skills or concepts?

27. ☐ Y ☐ N   Did you see any evidence that couples connected lessons learned from the curriculum to their lives?

    *If so, d*escribe

28. ☐ Y ☐ N   Did the couples have any specific questions or challenges in understanding the curriculum material?

    If so, how did the facilitator respond?

29. ☐ Y ☐ N   Did the facilitators provide sufficient opportunity and time for couples to ask questions and clarify issues?

30. ☐ Y ☐ N   Did couples ask questions during the workshop?

WORKSHOP DELIVERY OBSERVATION CHECKLIST
Developed by the Family Expectations Program in Oklahoma City, OK

	Satisfactory	Needs Improvement
Acted in a non-judgmental manner toward couples	☐	☐
Used curriculum communication skills when responding to couples	☐	☐
Displayed empathy toward couples	☐	☐
Recognized couples' non-verbal cues	☐	☐
Encouraged participation from all couples	☐	☐
Fostered discussion between couples in the group	☐	☐
Engaged couples in the curriculum	☐	☐
Spoke so that all couples could hear and understand	☐	☐
Asked and encouraged responses to open-ended questions	☐	☐
Refrained from counseling couples	☐	☐
Used appropriate examples to reinforce curriculum	☐	☐
Used humor when appropriate	☐	☐
Was prepared for session	☐	☐
Appropriately used technology when teaching	☐	☐
Started and ended the session on time	☐	☐
Used different teaching techniques to increase learning opportunities	☐	☐
Promoted a positive, comfortable atmosphere	☐	☐
Validated views and opinions of both partners	☐	☐
Encouraged open communication	☐	☐
Appropriately used visual aids	☐	☐

QUESTIONS TO ASK ONE OR TWO COUPLES, IF TIME ALLOWS

1.　　　☐ Y ☐ N　　Was this workshop typical of the sessions you've attended?
2.　　　☐ Y ☐ N　　Were the materials that were used in the session useful to you?
   a. *Which ones in particular?*
3.　　　☐ Y ☐ N　　Do you feel comfortable participating in the sessions?

   a. *Please explain why or why not.*

4.   □ Y □ N   In a typical session, are you encouraged by the facilitators to ask questions or share ideas and information?

5.   □ Y □ N   Do you have any concerns about the workshops you've participated in?

    a.   *If so, what are they?*

6.   □ Y □ N   Have you learned any skills in the workshops?

    a.   *If yes, what is the most helpful thing that you have learned so far?*

7.   Y □ N □ Do you use what you have learned in your marriage?

8.   What is the best part about participating in the workshops?

Family Support Coordinator Visit Observation

Instructions: Observer can use this form to document observations either during or immediately after observing an interaction between a Family Support Coordinator and a SHM couple.

Observer name	
Staff name(s) and title(s)	
Language meeting conducted in	
Date and time of observation	
Location of observation	

If possible, ask FSC in advance of meeting:

1. Approximately how many times has the FSC met with this couple in person?
2. Was this a regularly scheduled meeting or was it requested by either the FSC or one or more of the spouses? *Check one:*
   ☐ Regularly scheduled

   ☐ Requested by couple

3. What was the purpose of the meeting?

Points for observation:

4. ☐ Y ☐ N Did the meeting location allow for privacy?

5. Who was present at the meeting?

   ☐ Couple

   ☐ One member of a couple

   ☐ Child/children

6. ☐ Y ☐ N Did everyone expected for the meeting show up?

   If not, why?

7. ☐ Y ☐ N Did the FSC clearly outline the goal of the meeting?

   What was the goal?

8.   What topics were discussed?

☐ Y ☐ N FSC followed-up or checked-in on issues or discussions from their last meeting?

☐ Y ☐ N FSC inquired/checked-in about transportation and child care needs the couple may have to help them attend workshops?

☐ Y ☐ N FSC inquired/checked-in about any other resource needs the couple may have?

☐ Y ☐ N FSC made referrals for resources/services?

☐ Y ☐ N FSC referenced curriculum or otherwise reinforced curriculum skills?

☐ Y ☐ N FSC asked about how the couple is doing with skills exercises/applying curriculum skills at home?

☐ Y ☐ N FSC did activities with the couple?

Which activities?

☐ Y ☐ N Were these activities planned to be used?

☐ Y ☐ N Did the FSC choose in the moment to use a certain activity based on how the couple was interacting or what they were discussing?

9.   What issues did the participants bring up during the meeting?

10. ☐ Y ☐ N Did the FSC address these issues well?

11. What questions did the FSC bring up?

12. What decisions/next steps were agreed upon?

13. ☐ Y ☐ N Were the objectives of the meeting accomplished?

If not, why?

14. ☐ Y ☐ N Was a clear date and plan for their next meeting established?

15. ☐ Y ☐ N Did the FSC give the couple a participation support and/or an incentive for having attended the in-person meeting?

16. ☐ Y ☐ N Did the FSC adequately explain the participation support or incentive?

Ask FSC <u>after</u> the meeting:

17. ☐ Y ☐ N Did the FSC accurately record this effort in the MIS and do so in a timely manner?

18. ☐ Y ☐ N Does FSC want supervisor input on anything that came up during this meeting?

If yes, about which issue(s)?

Reflections/summary questions

19. What proportion stemmed from the couple relationship (for example, working on an aspect of the curriculum)?

20. What proportion of the conversation focused on issues that applied primarily to one individual spouse (for example, one of them needing a job or needing a referral)?

21. What aspects of the meeting appeared helpful to the couple or the individual?

22. ☐ Y ☐ N When individual issues were the main focus, did the FSC attempt to link the discussion at any point to implications for the couple relationship or to the skills that the couple has been learning?

23. ☐ Y ☐ N Did the FSC seem well prepared for the meeting?

24. Did the FSC

    ☐ Y ☐ N Conduct the meeting using strengths-based principles?

    ☐ Y ☐ N Acknowledge and build on strengths of the couple?

    ☐ Y ☐ N Facilitate the couple addressing their own issues and coming up with their own solutions?

25. ☐ Y ☐ N Did the FSC seem to have and/or work on building a relationship with the couple?

26. ☐ Y ☐ N Did the couple seem comfortable with the FSC and was the FSC comfortable talking to the couple?

27. ☐ Y ☐ N Was the FSC familiar with the history of the couple in the program, their current goals/needs, their children, etc?

28. ☐ Y ☐ N If the FSC was not familiar with the history of the couple (or if this was the first meeting), did the FSC work to establish a relationship/familiarity with the couple?

29. ☐ Y ☐ N Did the meeting encourage and support participation in the program?

30. ☐ Y ☐ N Did the individual spouse or the couple present any difficult issues that seemed to require clinical judgment for which the FSC might benefit from supervisor's input?

    If yes, describe

31. ☐ Y ☐ N Do you have any concerns about the meeting you observed?

    If yes, describe.

32. What kind of TA do you think the FSC might need to address these concerns or improve his or her work with couples and/or with individuals?

Appendix P: Case File Review Guide

Case file reviews help identify issues relating to quality of data and training needs of program staff. The following guide was developed to support SHM programs in conducting thorough and productive case file reviews.

Questions and topics to guide the case file review:
Managers and supervisors can use the following general questions and key items to look for as they conduct individual reviews of case files.
- Did the staff contact and interact with the couple according to the sites' operational plan?
- Did case notes clearly outline actions taken and follow-up steps?
- Did staff follow up when and how they indicated they would?
- Did staff follow up promptly on absences from workshops or activities?
- Were there gaps, and if so, where?

Key data entry questions:
- Did you find that staff members were correctly following your procedures for entering couple information into the data management system?
- Were there instances where particular data were missing from the record (for example, workshop attendance records, in-person contacts, referrals, or support payments)?

Period enrolled in workshop
Take note of:
- Date workshop sessions started and whether couple attended first session
- Attendance at workshop sessions and reasons for any absences
- Any make-ups that were attended (and any that were scheduled and missed)
- Number, frequency, and type (phone, office visit, home visit) of contacts with the FSC during the course of the workshops, the case notes associated with these contacts, and the level of the couple in the site's case management leveling system
- Changes in the couple's level
- Number of contacts that indicate that FSCs are reinforcing the workshop curriculum
- Support services received (such as transportation supports and child care) during the workshop period
- Any referrals made to outside services
- Attendance at supplemental activities during the course of the workshops and topic covered in activities
- Any reasons for absence from supplemental activities
- Receipt of incentives for attending workshops, FSC meetings, or supplemental activities
- Case notes not associated with a particular contact
- Supervisory monitoring of the case, as documented in the case notes and contacts

Period after workshops end
Take note of:
- Number, frequency, and type of FSC contacts after the last workshop attendance and the level of the couple in the case management leveling system
- Changes in the couple's level
- Number, frequency, and topics of supplemental activities attended after the last workshop attendance

- Any reasons for absence from supplemental activities
- Support services received (such as transportation supports and child care) after the last workshop attendance
- Receipt of incentives for attending FSC meetings or supplemental activities after the last workshop attendance
- Anything else of note after the last workshop attendance
- Supervisory monitoring of the case, as documented in the case notes and contacts

Appendix Q: Form for Collecting Couple Feedback
Developed by the Family Expectations program in Oklahoma City

Managers might want to prepare for talking to couples by determining the couple's enrollment date, what program activities the couple has participated in to date, how often they are expected to see their FSC, and how many in-person contacts they have had, how long their visits with their FSC normally last, and when the couple's last office visit occurred.

Date of couple's enrollment: _____

Date of last FSC Contact: _____   **Assigned FSC:_____**

Couple's names:_____

Name of Manager/Supervisor making the call:_____Date of Call: _____

Spoke To: ☐ Wife   ☑ Husband

Introduce yourself and then say something like:

"You have been participating in our program for _____ months. As a way of improving our service to couples, I am asking for suggestions from couples who have been involved in our program. Do you have time to answer a few questions about your experience with [name of program]?"

1. What do you like most about [name of program]?_____

_____

2. What do you like least? _____

_____

3. Is [name of program] what you thought it would be when you signed up? _____

_____

    Why or why not? _____

    _____

4. How would you describe [name of FSC]?

    a. Friendly
    b. Rushed
    c. Caring
    d. Rude
    e. Other:_____
    Why: _____

5. Does [name of FSC] ever give you information on relationships, parenting, or community resources

    etc.? _____

6. What information did you find the most helpful? _____

    Why? _____

7. What do you like most about your visits with [name of FSC]? _____

    Why? _____

8. *If couple has participated in a workshop*: What did you like most about the workshops?

    _____ _____

    What did you like least?_____

9. Did you learn things in the workshops that you find useful?

Y ☐ N ☐ *If yes*: What are some of those things?

    _____

10. *If the couple has not participated in a workshop*:

Y ☐ N ☐ Are you interested in participating in a workshop?

What has prevented you from participating?

    _____

11. Are there things you would like some help with? _____

12. Can you think of anything we could add or change that would make our services better? _____

    _____

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About MDRC

MDRC is a nonprofit, nonpartisan social and education policy research organization dedicated to learning what works to improve the well-being of low-income people. Through its research and the active communication of its findings, MDRC seeks to enhance the effectiveness of social and education policies and programs.

Founded in 1974 and located in New York City and Oakland, California, MDRC is best known for mounting rigorous, large-scale, real-world tests of new and existing policies and programs. Its projects are a mix of demonstrations (field tests of promising new program approaches) and evaluations of ongoing government and community initiatives. MDRC's staff bring an unusual combination of research and organizational experience to their work, providing expertise on the latest in qualitative and quantitative methods and on program design, development, implementation, and management. MDRC seeks to learn not just whether a program is effective but also how and why the program's effects occur. In addition, it tries to place each project's findings in the broader context of related research — in order to build knowledge about what works across the social and education policy fields. MDRC's findings, lessons, and best practices are proactively shared with a broad audience in the policy and practitioner community as well as with the general public and the media.

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- Promoting Family Well-Being and Children's Development
- Improving Public Education
- Raising Academic Achievement and Persistence in College
- Supporting Low-Wage Workers and Communities
- Overcoming Barriers to Employment

Working in almost every state, all of the nation's largest cities, and Canada and the United Kingdom, MDRC conducts its projects in partnership with national, state, and local governments, public school systems, community organizations, and numerous private philanthropies.