

# Lessons Learned: “Warm Handoff” Communication

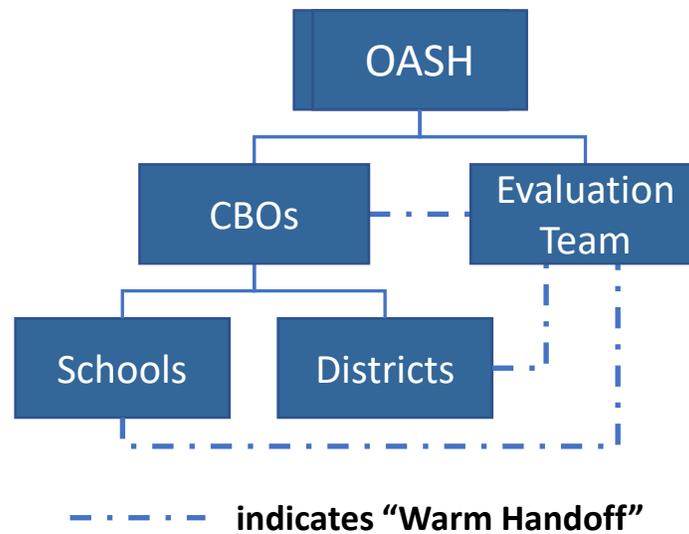
Program evaluations involve considerable time communicating with stakeholders about emergent and / or ongoing issues. Whether a community-based organization (CBO) or school / site has a small or large team, staff members may have both programmatic and administrative responsibilities. On the other hand, it can seem like other stakeholders have many staff, each dedicated to a specific task and reaching out with questions and to-do items. For CBOs and schools / project sites, this outreach can be overwhelming and detract from the time dedicated to program implementation. Let’s look at how “Warm Handoff” communication can help reduce the number of points of contact (POC) between the evaluation team and the CBOs, and between the evaluation team and the schools / sites!

## “Warm Handoffs” – What Are They and Why Use Them?

During Fall 2019, the Office of the Assistant Secretary for Health (OASH), within the U.S. Department of Health and Human Services (HHS), sponsored a formative evaluation to assess the impact and implementation of two sexual risk avoidance (SRA) curricula aligned with the Systematic Method for Assessing Risk Avoidance Tool (SMARTool; CRE, 2019).<sup>i</sup> OASH engaged an evaluation team to lead the study along with two CBOs, Be Strong International (BSI) and Operation Keepsake (OK). BSI and OK partnered with a total of 14 secondary schools in 11 school districts.

Given the number of stakeholders, this program evaluation used Warm Handoff communication to streamline interactions between stakeholders and reduce the risk of repeated requests, potential information sharing errors, and the need to track a wide variety of staff members and their roles. As shown in the following figure:

- OASH served as the POC between the CBOs and the evaluation team
- The CBOs served as POCs between the schools / sites and OASH



When needed, the OASH POC provided a Warm Handoff between the CBOs and the evaluation team or the CBO POC provided a Warm Handoff between the schools and the evaluation team. POCs built trust through frequent, open communication, and by remaining easily accessible to help resolve questions and concerns.

## Recommendations

Based on this experience, OASH compiled recommendations for CBOs to consider if they participate in a similar study or evaluation and choose to use Warm Handoffs:

- **Early in the project life cycle**, meet members of the evaluation team—either in person or online—to build familiarity and trust and introduce the Warm Handoff POCs.
- **Host or attend a face-to-face technical assistance (TA) site visit, either in person or online** with all critical evaluation team members, including CBO staff, project leads, field data collectors, and other team members (e.g., supervisors).
- **Keep the lines of communication open.** This type of dynamic, time-limited work requires substantial verbal and written communication in the planning and implementation phases. Consider having frequent, brief meetings during the evaluation with the POC or core evaluation team members to keep them informed and troubleshoot in near-real time.
- **Open and continuous communication is imperative.** These open communications and strong, trusting working relationships are essential for an agile approach. This foundation helps the team work smoothly to solve problems quickly and effectively, while promoting open sharing of risks and solutions to achieve project success. As the project moves to the implementation phase, schedule regular, agenda-based meetings with the POC and project stakeholders to provide time for brainstorming and troubleshooting. Project updates shared during these meetings will aid in tracking project fidelity and can help identify and minimize risk.

- **Reach out** with project questions or concerns and identify backup POCs and provide their contact information. Provide introductions as needed. As project issues and concerns arise, the POCs can address them in real time through multiple daily communications. The frontline POCs who are available on a reasonable, on-call basis will keep direct lines of communication open, reduce duplication, and help to build relationships and trust.

Warm Handoff communication not only improved this evaluation by streamlining requests to CBOs and schools / sites, but also recognized and supported the importance of the CBOs' long-term community relationships, experience, and programmatic goals. We hope that the approach of strengthening communication among stakeholders, from researchers and evaluators to sexual health education practitioners as well as funding and oversight organizations, can provide insight to the field and further facilitate successful completion of sexual health education program evaluations and beyond.

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<sup>i</sup> The SMARTool is a technical assistance (TA) guide for use by schools, youth-serving organizations, and other agencies interested in delivering SRA education to youth.