Office of Population Affairs

April 2025

TPP Tier 1 Grant Observation Planning Tool Overview and User Guide

Tool overview

The Teen Pregnancy Prevention (TPP) Tier 1 Grant Observation Planning Tool can help you plan, log, and track the evidence-based program (EBP) observations required by your TPP Tier 1 grant. The goal of this tool is to ensure you are planning to observe at least the minimum number of sessions per EBP and facilitator as required by the Office of Population Affairs (OPA).

What are the observation requirements for my TPP Tier 1 grant?

Your grant requires you to observe 5 percent of all sessions for each EBP implemented and 100 percent of all EBP facilitators for fidelity and quality each year. You are not required to observe each implementation setting, but doing so can improve the fidelity of your program's implementation.

Am I required to use the tool?

No. Using this tool is optional, but it can help you plan the number of observations needed to meet your grant requirements.

How is the tool organized?

The Observation Planning Tool is a Microsoft Excel template with the following sections:

- **Tool Overview** (Tab 1) provides an overview of the tool and where you can go for additional support or resources.
- **EBP Observation Calculator** (Tab 2) calculates the number of sessions you are required to observe by EBP.
- **Observation Log** (Tab 3) provides a table where you can record each scheduled observation and monitor whether those observations were completed.
- **Observation Tracking Summary Tables** (Tabs 4-9) provide a summary of your observation progress (by EBP; facilitator; setting; location; and EBP and setting, respectively) and can help you identify where you still have gaps.

How do I use the tool?

This document lays out instructions on how to fill out each part of the tool. Each section includes step-by-step instructions and user notes to keep in mind as you make your way through the tool. A blank copy of the tool and a pre-filled example are available on Connect.gov. An instructional video on how to use the tool is available on the RHNTC website. (Note: the final format of the file is slightly different than the one shown in the video. The summary tables are on separate Excel tabs rather than on a single tab.) Keep in mind that for this tool to be useful it needs to be updated regularly.

What am I required to use to *conduct* my observations?

To conduct your observations, you must use (1) the EBP or program model's fidelity log (which you can access through the program developer) to ensure the facilitator is adhering to the fidelity requirements outlined by the EBP developer and (2) the OPA program observation tool to document the details of your observation. This tool is intended to complement the Section Data Tracker tool that is available for calculating performance measure data (which you can access by logging into your account).

Where can I go for additional support or resources?

Please contact your project officer (PO) if you have questions about your grant's observation requirements. Please contact the Mathematica Eval TA team at TPPEvalTA@mathematica-mpr.com if you have questions about using this tool.

User Guide

EBP Observation Calculator

This tab calculates the total number of sessions you are required to observe per EBP during each grant year (based on the 5 percent rule).

Step-by-step instructions

1. Before you start planning for your observations, we recommend saving a new copy of the blank Observation Planning Tool template for each grant year. You should save the file as a .xlms (or macro-enabled excel file). You may also need to click "Enable macros" or "Make this a trusted document" if Excel prompts you. These steps are needed to automatically update the summary tables. If not, you will need to update the Observation Tracking Summary Tables in Tabs 4-9 manually (see the Observation Tracking Summary Tables instructions below and in the Excel file).
2. Use the drop-down lists in Columns A and B to select each approved EBP and setting (optional) you are planning to implement during the grant year.

User notes

- You may not know all planned implementations in advance. You can come back to this tab any time to update or correct data as needed.
- You can leave Column B blank if you do not want to incorporate setting in your observation planning. If you want to ensure coverage of observations across settings, you can enter each EBP-setting combination in its own row.

3. Fill in Columns C and D with the number of sessions the EBP takes to implement and the planned number of sections for each EBP.
4. Do not enter data in the green cells in Columns E and F. Column E automatically calculates the total number of sessions you will offer for each EBP, and Column F automatically calculates the total number of sessions you are required to observe each EBP using the 5 percent rule.

User notes

- A “section” is each group of youth that will receive a program together. For example, if you implement a program in 20 9th-grade health classes, you are implementing 20 sections. For one-on-one programs, the section is the number of individuals who will receive the program.
- Some programs may require further guidance from OPA on how to best observe them, for example one-on-one interventions. Some may not require observations, such as those that are fully automated, such as Plan A. Please contact your PO for further guidance on observation requirements related to such interventions.

Observation log

This tab allows you to (1) plan and lay out details for the individual observations necessary to meet OPA’s requirements and (2) monitor whether you have completed each observation.

Step-by-step instructions

1. Create a row for each planned observation.
2. Fill in details for each planned observation in Columns A–G. You will manually enter data for the observation date, observation time, observer, and facilitator in Columns A–D. You will select each EBP and setting using the drop-down list of approved EBPs in Column E (EBP name) and settings in Column F (Setting), if you are tracking setting. If you have multiple locations per setting, for instance multiple different high schools, you can enter each location in Column G (Location). Alternatively, if you work in different states or with different partners you could repurpose this column to track on those dimensions but do not change the name of the column as that is used to build the summary tables in the Observation Tracking Summary Tables in Tabs 4-9.

User notes

- It's important to keep this tab up to date because the information entered in this tab is used in the six Observation Track Summary Tables.
- Come back to this tab regularly and correct any outdated or incorrect data as needed (for example, you observed at a different time, or you used a different observer than originally planned).
- You can sort this tab by any column if that’s useful for data entry or monitoring.

3. Use the drop-down list in Column H to select the status of each observation – Scheduled, Canceled, or Completed. Don’t forget to mark “Completed” after you complete an observation as that data is used in the summary tables to tell you if you are meeting your observation goals. Use Column L to record any notes about the observation, such as information on contextual factors that affected implementation.

Observation Tracking Summary Tables

The information entered in the EBP Observation Calculator and Observation Log is used in the six Observation Tracking Summary Tables to provide you with a snapshot summary of your observation progress and help you identify any gaps in observations. **Do not manually update the data within the summary tables**. These tables should **only** be updated by adding or editing data entered in the EBP Observation Calculator and Observation Log. The tables located in Tabs 4-9 are:

- **Table 1. Sessions required to observe and schedule by EBP.** This table summarizes the required number of sessions to observe per EBP across settings (that is, the total number of observations required by OPA using the 5 percent rule), as well as the sessions that are remaining to be scheduled by EBP to meet the required number of observations.
- **Table 2. Observation completed by EBP.** This table presents the number of observations that are scheduled and have been completed by EBP.
- **Table 3. Observations completed by facilitator.** This table presents the number of observations completed by facilitator to help you determine whether you have observed each facilitator annually as required by OPA. Carefully review the list of facilitators in the Observation Log to ensure you are not missing a facilitator.
- **Table 4. Observations completed by setting.** This table presents the number of observations scheduled and completed by setting, if you chose to include that information in the EBP Observation Calculator and Observation Log. You are not required to observe each implementation setting but doing so can improve the fidelity of your program's implementation overall.
- **Table 5. Observations completed by location.** This table presents the number of observations scheduled and completed by location, if you chose to include that information in the EBP Observation Calculator and Observation Log. You are not required to observe each implementation location but doing so can improve the fidelity of your program's implementation overall.
- **Table 6. Observations completed by EBP and setting.** This table combines EBP and setting, which might be useful if you use the same EBP in multiple settings.

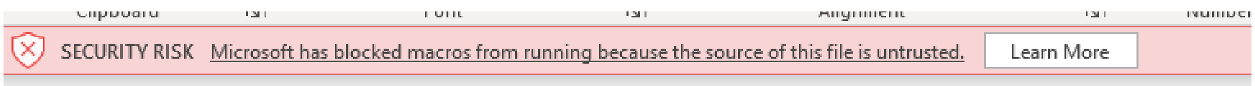
User notes

- If the file is saved as a .xlms (macro-enabled Excel file) it will automatically refresh the tables. You can refresh manually by right clicking any cell in each table and selecting "Refresh."

Troubleshooting

The excel file uses macros to 1) automatically refresh the tables in Tabs 4-9, 2) to check that the programs and settings listed in the EBP Observation Calculator and Observation Log align, and 3) to complete the "sessions remaining to schedule" column (column C) in Table 1. If you run into trouble using the macro-enabled file, we present a potential fix below. If your organization does not allow you to use macro-enabled files created outside your organization, you can still use the planning tool you will just lose the three functions noted above.

If you get the following error after opening the downloaded file…

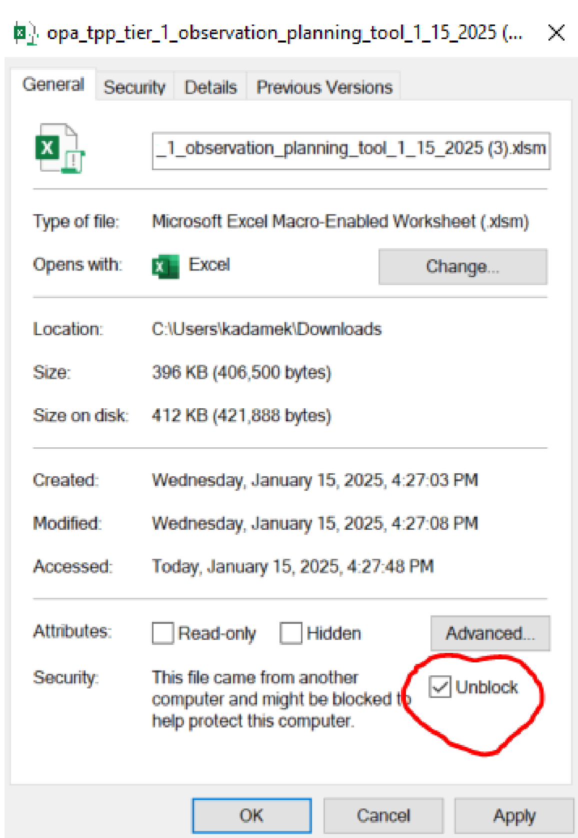


you need to tell your computer to trust the macro-enabled file. Follow the instructions below to tell your computer that the macros are safe to use. Once the file is open, you may also need to click “Enable content” after you follow the steps below.

Unblock the file

In most cases you can unblock macros by modifying the properties of a file as follows:

1. Open Windows File Explorer and go to the folder where you saved the file.
2. Right-click the file and choose **Properties** from the context menu.
3. At the bottom of the **General** tab, select the **Unblock** checkbox and select **OK** (see image below).



In some cases, an organization will not allow you to use a macro-enabled file under any circumstances. In this case, try the following steps to manually refresh the tables:

1. Make a copy of the file (or do a “save as”) a regular excel file (.xlsx).
2. After you have entered data, you will need to refresh Tables 1-6 manually by right clicking in each of the tables and then selecting **Refresh.** The tables also refresh when you close and reopen the file. [Note: When refreshing Table 1 manually, the “sessions remaining to schedule” column (column C) will no longer work. To determine the observations that still need to be scheduled, compare the number of required observations in Table 1 with the total column in Table 2 for each EBP.]