

ASPE RESEARCH BRIEF

OFFICE OF THE ASSISTANT SECRETARY FOR PLANNING AND EVALUATION
OFFICE OF HUMAN SERVICES POLICY - U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

PUTTING MARRIAGE ON THE AGENDA

How Oklahoma Laid the Foundation for Its Marriage Initiative

In 1999, Oklahoma began to consider how state government might play a role in strengthening families and marriages. To achieve their goals, the governor and key leaders first sought support for a statewide “marriage initiative.” In the first few years of the Oklahoma Marriage Initiative (OMI) various strategies were tested; some worked as anticipated and some that did not were revised or abandoned. Over time, OMI leaders developed an intervention strategy of offering marriage education, identified a stable source of funding, and established a public-private management structure. While relying on existing infrastructure and volunteers, OMI staff also began developing a service delivery system to make marriage education accessible to all Oklahomans.

States, communities, and organizations considering adding a healthy marriage component to their policies and programs face a common set of challenges:

- How to gain support and stakeholder buy-in?
- What intervention strategies to choose?
- How to fund, implement, manage, and sustain the initiative?
- How to define the goals of a broad and evolving initiative?

The OMI’s early development serves as a timely case study illustrating how leaders in one state—with the largest and longest running marriage initiative—met these challenges. This brief describes the approaches Oklahoma took when launching its innovative initiative. Although other states differ in their circumstances, an understanding of the OMI’s experiences will be illustrative both of the issues that are likely to be encountered by other initiatives as well as strategies and options that might be considered to address them. This brief describes how Oklahoma developed public support, designed an intervention strategy, and secured funding, set up a management structure, and formulated goals and objectives for its marriage initiative.

ABOUT THIS RESEARCH BRIEF

This ASPE Research Brief describes lessons learned during the establishment of the Oklahoma Marriage Initiative, drawing on findings from an in-depth process evaluation conducted by Mathematica Policy Research, Inc. under contract to ASPE. This brief was prepared by Debra A. Strong. Other briefs in this series focus on specific aspects of the OMI’s implementation, including its successes and challenges, and strategies used to address obstacles encountered.

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What Led to the Idea for a Statewide Marriage Initiative?

A confluence of emerging public policy concerns and research gave rise to what is now the Oklahoma Marriage Initiative. At the federal level, the 1996 welfare reform legislation that established the Temporary Assistance for Needy Families (TANF) program included two objectives related to family structure: reducing the incidence of out-of-wedlock pregnancies and encouraging the formation and maintenance of two-parent families. There also was a growing body of research confirming the benefits to children of growing up in families with two married parents. At the same time, an Oklahoma state economic report suggested that, along with strengthening education and taking other steps that could directly improve productivity, Oklahoma should increase its attention to family and social conditions that might indirectly affect the state's prospects for economic growth.¹ These conditions included high rates of divorce and nonmarital childbearing—at the time Oklahoma's divorce rate was the second highest in the nation.² Taken together, these factors led key state leaders to the conclusion that finding a way to address the divorce rate was an important priority for Oklahoma.

How Did the OMI Develop Support and Stakeholder Buy-In?

Oklahoma leaders recognized that the idea of the state initiating broad action in support of marriage was new and unfamiliar. To move forward, supporters of a statewide marriage initiative worked step by step to build support and credibility for the OMI. State leadership articulated ambitious goals for the initiative, and sought buy-in and participation from multiple sectors in the state. Oklahoma marriage supporters drew on research, and brought experts and advocates together to stimulate interest, address skeptics, and build awareness.

High Ranking Political Officials Put Marriage on the Agenda. From the outset, state leaders recognized the need to develop broad support for an initiative focusing on marriage. To begin building political support, Oklahoma's then-Secretary of Health and Human Services, Jerry Regier—who had the original vision for focusing on marriage—brought TANF's family formation goals and their related issues to the attention of then-governor Frank Keating and other state leaders. He organized a session at a retreat held for the governor's cabinet members following Keating's reelection in late 1998. During the session, presenters discussed the links between strong families and a strong economy, and between single-parent or unwed motherhood and increased risks of child poverty. Although some cabinet members at first opposed state involvement, the presentation intrigued the group.

Motivated by these presentations as well as by release of the state economic report, Governor Keating proposed in his 1999 inaugural address ambitious 10-year social goals for the state. These goals included cutting Oklahoma's divorce and out-of-wedlock birth rates by one third, and reducing child abuse by half. He also sponsored "The Governor and First Lady's Conference on Marriage" in March 1999, to introduce state-level leaders and opinion-makers to the importance of marriage and the need for action to achieve these goals (particularly reducing the divorce rate). Two hundred representatives of state institutional and organizational sectors, such as business, the faith community, social services funders and providers, education, and the media, attended. The response among sectors was generally positive and interest was high. Leveraging this interest to create specific strategies, however, turned out to be a significant challenge.

¹ Holmes, Alexander, Donald Murry, Kent Olson, and Larkin Warner. "Raising Oklahoma's Personal Income: Lessons from the Fastest-Growing States." State Policy & Economic Development in Oklahoma 1998: A Report to Oklahoma 2000. Oklahoma City, OK: Oklahoma 2000, Inc., 1998.

² A 1995 report from the CDC ranked Oklahoma's divorce rate second highest in the nation ("Marriage in America: A Report to the Nation." Council on Families in America. Atlanta, GA: Centers for Disease Control and Prevention, 1995).

Talking with Key Groups and Leaders Stimulated Interest and Began Building Public Support.

Leaders of the OMI began to build public support by asking individuals or groups representing the various sectors to undertake activities to support the OMI in ways consistent with their primary mission or their roles in the state or their communities. Secretary Regier and others met with leaders from these sectors to encourage them to seek ways to speak up for and support marriage. To build a case for taking action, OMI leaders drew on existing research showing how marriage affects family and child outcomes. They first approached groups they felt would be open to the idea, such as clergy and others in the faith community. They brought leaders of the faith community together to pledge their support for the initiative, and to seek agreement on a marriage covenant.³ A group of clerical leaders publicly pledged support for the OMI in February 2000, and eventually almost 1,000 of them signed covenants.

Engaging Experts Helped the OMI Develop Credibility, Address Skeptics, and Build Public Awareness.

Engaging leaders and experts with strong reputations and potentially different perspectives on a range of issues helped OMI planners to prepare for and address initial skeptics and opponents. A steering committee was established to help plan and advance the initiative. Howard Hendrick, director of Oklahoma's Department of Human Services (DHS), became an important member of the group. Prior to being named DHS director in 1998, he served for 12 years in the Oklahoma State Senate, where he developed close relationships with other legislators. These relationships proved useful in keeping communication open as the OMI developed. The steering committee also engaged experts to collaborate in planning and to speak to interested groups. Experts working with the steering committee included, for example, Dr. Les Parrott of the Center for Relationship Development at Seattle Pacific University, and Theodora Ooms of the Center for Law and Social Policy (CLASP).⁴ Advocates for domestic violence services also were included as partners on the steering committee, adding depth and diversity to the team.

To help build public support for the initiative during the early planning period, the OMI leaders engaged relationship experts to speak to and collaborate with a variety of audiences around the state. Dr. Les Parrot first spoke at a state Health Department-sponsored conference of more than 800 public health nurses. In 2000, he and his wife, Dr. Leslie Parrot, moved to Oklahoma for a year and were named scholars in residence at Oklahoma State University. In this capacity, they made appearances as OMI "marriage ambassadors" throughout the state, including at college and university venues.

How Did the OMI Choose Its Intervention Strategy?

When the OMI began, there was no existing menu of broad-based public strategies to affect marriage or divorce rates, so little information was available to guide OMI planners in designing the intervention strategy. OMI leaders first focused on changing attitudes toward marriage and divorce to achieve the state's goals, but then decided that the use of skills-based programs to help improve people's experiences in relationships and marriage might be more useful, especially at first. OMI planners decided to choose a single marriage education curriculum that could be implemented statewide and then closely examined available curricula to select one with a basis in research.

Despite Strong Interest, Sectors Were Unsure How to Promote More Positive Norms for the Institution of Marriage. The initial vision for the OMI was to stimulate expressions of support for the institution of marriage across major sectors in the state. This support, by reestablishing more positive norms and

³ Oklahoma's marriage covenant outlined minimum requirements relating to preparation for marriage that clergy pledged to uphold when agreeing to marry a couple in their religious institution.

⁴ The Center for Relationship Development was established to help students learn to build healthy, lasting relationships; to foster positive relationships with their classmates, roommates, parents, teammates, siblings, bosses, and potential marriage partners; and to solve relationship problems [<http://www.spu.edu/depts/spfc/undergrad/ops/realrelationships.asp>]. CLASP is a national nonprofit organization that conducts research, policy analysis, and advocacy and provides information and technical assistance to improve the lives of low-income people [<http://www.clasp.org/about.php>].

attitudes toward marriage, was intended to lead to a reduction in divorce rates. However, it became clear that, despite relatively high interest and support for the initiative, relying on sectors to develop and initiate activities to support marriage would be difficult in the absence of a well-defined strategy. In some sectors, interested groups were uncertain of what action to take. Groups who heard presentations by OMI's marriage ambassadors were supportive, but the presentations did not lead to sustained action because it was unclear how they could become involved. Some sectors that tried to take action faced obstacles to coordination, a lack of resources, or a lack of fit with core missions. For instance, initial efforts by the OMI to help the faith sector implement activities to support marriage proved more complicated than first imagined, due to the faith community's diversity and lack of experience working together. Some of the state's business leaders and foundations contributed funds to support the OMI, but businesses were uncomfortable addressing marriage and intimate relationships in the workplace.

Some Leaders Suggested that Implementing Services to Improve Marriages Might Provide a More Concrete and Effective Strategy. In addition to these challenges, some supporters wondered whether efforts to change norms and attitudes could, by themselves, achieve the broad changes sought by the OMI. They suggested instead that services to help marriages succeed, such as premarital education or counseling, would be necessary to create behavior change. OMI leaders soon realized that the availability of such services in the state was low. They also were concerned that the services that were available might not be suitable for the goals of the initiative. For example, DHS expected that marriage counseling could be hard to find or prohibitively expensive for some, especially the low-income families the agency served. Questions also were raised about whether traditional counseling was the best approach, since it did not address preparation for marriage. In addition, there were concerns that couples might be resistant to entering counseling due to perceived stigma or misinformation.

In response to concerns about the need for and availability of appropriate services, the OMI leadership began to seek alternative approaches. A new idea started to take shape when OMI leaders learned that instruction in relationship skills could help people prepare for and sustain marriage. In July 1999, as the OMI was beginning, its leaders attended a conference focused on what is now known as "marriage education." The annual Smart Marriages conference⁵ provided information and resources for the OMI, and insight into an emerging grassroots movement to support and sustain marriage.

The OMI Began to Focus on Marriage Education as its Primary Intervention. Marriage education refers to a variety of services, programs, and curricula that teach skills and provide information to couples with the goal of helping them prepare for and sustain healthy and satisfying marriages.⁶ These structured, curriculum-based programs seek to prevent marital distress and dissolution by educating couples on the skills needed to develop and maintain relationships. Some existing programs are based on a substantial foundation of research, and need not be delivered by professional counselors. Through Smart Marriages and other avenues, such as professional or continuing education programs, professional practitioners and clergy, as well as some nonprofessionals, are trained to deliver a variety of programs and curricula that have been developed over the past 30 years. Selecting a marriage education program and making it widely available to Oklahomans seemed to OMI's leaders to be a concrete and feasible strategy for helping more couples enter and sustain healthy marriages.

To Ease Statewide Implementation, Create Consistency, and Ensure the Use of Research-Based Materials, Oklahoma Selected a Single Marriage Education Curriculum. In January 2001, after a thorough search of literature and research on curriculum effectiveness, Oklahoma Marriage Initiative staff selected the Prevention and Relationship Enhancement Program (PREP) as its core curriculum. PREP's developers, Drs. Howard Markman and Scott Stanley, were well known to academics and professionals in

⁵ Presented by the Coalition for Marriage, Family, and Couples Education, founded in 1996.

⁶ Dion, M. Robin, Barbara Devaney, Sheena McConnell, Melissa Ford, Heather Hill, and Pamela Winston. "Helping Unwed Parents Build Strong and Healthy Marriages: A Conceptual Framework for Interventions." Washington, DC: Mathematica Policy Research, Inc., 2003. More information about marriage education can be found on the Smart Marriages website at [<http://www.smartmarriages.com>].

the marriage, relationship, and counseling fields, which enhanced acceptance of the OMI's marriage education strategy among those groups. OMI leaders also anticipated that using a single curriculum would simplify the process of adapting materials for alternative settings and audiences. In addition, the curriculum had been subjected to scientific evaluation to determine its effectiveness.

How Did Oklahoma Leverage Funding to Implement the OMI?

Many marriage initiatives today are being funded through federal grants under the Healthy Marriage Initiative, but because the OMI pre-dated congressional approval for such funds, Oklahoma had to find its own resources, at least in the beginning. To plan and initiate activities, Oklahoma found small sources of funding from the private and public sector, but quickly determined that more substantial funds were needed to provide the “staying power” to grow the OMI and eventually roll out services statewide. Once broad support for the OMI was clear, significant state funding was pledged from surplus TANF money. Oklahoma's DHS now allocates a budget for the OMI each year, based on the availability of TANF funds and the level of OMI activities. In recent years, the state also has sought and received federal funding to support specific program elements of the OMI.

A Small State Planning Contract Enabled the OMI to Get Started. To support its initial planning and coordination activities, OMI planners approached several state agencies, such as DHS, which administered the state's TANF program. DHS provided a small planning contract for the initiative. The State Health Department's commissioner and deputy commissioner also were approached. While they were supportive of the initiative because they felt it had important public health dimensions, the Health Department had no funds available to support OMI activities at the time.

OMI Supporters Also Sought Private Funds in the Early Years. In July 1999 OMI supporters began seeking private funds for early coordination and activities. OMI planners established a fiduciary partner to accept cash and in-kind donations, and approached business leaders and foundations to help fund the OMI. These groups did express support and made some contributions. It soon became apparent, however, that a widespread, ongoing effort could not be planned, implemented, or sustained without more substantial and predictable funding. OMI leaders began to consider whether any such sources of funding were available. One opportunity stood out.

TANF Surplus Funds Gave the OMI the Resources Needed to Implement Services Statewide. As in other states, dramatic declines in Oklahoma's TANF caseload in the years following the 1996 welfare reforms had created a pool of surplus TANF funds. In 2000, DHS in Oklahoma had a \$100 million surplus of combined state and federal TANF dollars. Federal law gave states wide latitude to use their surpluses for addressing TANF's overarching goals—including those relating to family formation. In Oklahoma these funds were controlled not by the state legislature, as they were in most states, but by a nine-member DHS governing board, the Commission for Human Services, whose members were appointed by the governor.⁷

In March 2000, Governor Keating asked the Commission to reserve 10 percent of the projected TANF surplus—a total of \$10 million over several years—for strengthening marriage. The Commission agreed. This symbolic and dramatic action constituted a public endorsement of the OMI's importance and also provided a large pool of available funding the OMI could draw on to sustain its planning process and to support the various activities and programs the OMI eventually would take up. DHS now provides annual funding for OMI activities based on the availability of TANF monies and the level of OMI activities. More recently, state funding has been leveraged to obtain federal funds through the Healthy Marriage Initiative and other programs, to support OMI activities for particular target populations, such as adoptive parents and unwed expectant couples.

⁷ This structure was established through the state's constitution in 1936.

How is the OMI Managed?

Whether implementing broad initiatives or individual programs to support healthy marriage, sponsors must develop an appropriate home base and an implementation approach suited to their goals and environments. In Oklahoma, DHS has taken a lead role in planning and implementing the initiative, but it has done so through a partnership with a private sector firm that operates or oversees most OMI activities. This partnership provides credibility as well as the flexibility to adapt and grow the OMI in response to lessons learned.

The OMI is Administered Through a Public-Private Partnership. Management of the OMI evolved into a public-private partnership that began early in the initiative. When it appeared that attendance at the 1999 Conference on Marriage might be lower than hoped, and that some sectors might be underrepresented, planners hired Public Strategies, Inc. (PSI), a public relations firm in Oklahoma City, to identify, invite, and encourage leaders across sectors to participate. The firm's founder and owner, Mary Myrick, who had strong connections with many state and local leaders in Oklahoma, found the idea of strengthening families through attention to marriage both interesting and compelling. After the conference, supported by a small planning contract from DHS, PSI continued to work with OMI supporters to approach faith, business, media, and other sectors to develop plans for how they would participate in the OMI or support its goals. Even after the planning contract ended in October 1999, Myrick and others at her firm continued to be involved on a voluntary, informal basis. They were key partners in developing initial support, seeking funds, and focusing on marriage education. In 2000, through a competitive bid process, Oklahoma's DHS awarded PSI a contract to implement and manage the OMI, which continues today.

Management by a Private Firm with Government Oversight Provided Flexibility in the Context of an Evolving Initiative. The contract between PSI and DHS reflected the exploratory and evolving nature of the OMI. It held PSI accountable for achieving overall OMI goals, and identified deliverables and outcomes. The contract did not, however, prescribe what the elements of the OMI would be, but instead required PSI to submit proposals to DHS for any new OMI activities—which DHS encouraged them to explore and propose. As other briefs on the OMI will explain, this flexibility has allowed the OMI and its service delivery infrastructure to change and expand significantly as new opportunities have arisen and lessons have been learned.

The partnership between DHS and PSI—as well as its timing—was perceived to offer important benefits to the OMI. As a private entity, PSI had more flexibility to develop staffing that suited the OMI's needs, and to make changes as the OMI rapidly evolved. Outsourcing lessened the perception that the OMI was a “government program” and made some groups—such as the faith sector—that otherwise might have been skeptical of partnering directly with government more willing to become involved. Since a marriage initiative was a new effort, and since the OMI was still in its early stages, outsourcing did not take jobs or staff away from DHS or threaten existing constituencies in the department or other public agencies. On the other hand, retaining DHS as a lead agency and involving them closely in the administration of the OMI lent credibility to PSI's efforts within state government, and helped ensure their access to major social service programs and providers as possible venues for marriage education activities or as referral sources for other providers.

How Are OMI Services Delivered?

Oklahoma sought to embed marriage education services within existing programs and agencies, but spent several years looking for the right opportunities and “niches.” To help make marriage education more broadly available, the OMI team began training local community members and professionals to deliver the PREP curriculum. The OMI staff also learned that providers, whether public agencies, community

volunteers, or counselors, needed more infrastructure and ongoing support than first thought, which led to the development of a service delivery system. Providing services through existing agencies and programs whenever possible was an early principle that still guides the OMI.

The OMI Established a Principle of Building on Existing Infrastructure to Deliver Services. Early in its development, a guiding principle was established for the OMI to build on existing infrastructure and systems to deliver marriage education services. DHS and PSI assumed that PSI's main role would be to serve as a clearinghouse for materials and information, and to provide PREP training to interested volunteers and organizations. In keeping with this principle, the OMI approached three government agencies that operated programs serving families, and explored the possibility of training their staff either to provide the PREP program to interested couples and individuals (the Oklahoma State University Cooperative Extension Services and the Child Guidance program within Oklahoma's Department of Health), or to refer clients to PREP workshops (TANF program staff within local DHS offices).

Initial Attempts To Train Public Agency Staff Were Disappointing At First, But Eventually Led To A Broad Service Delivery System. Sometimes trained staff were unable to attract as many workshop participants as hoped, or to institutionalize marriage education classes within their agencies. For example, some DHS workers were hesitant or uncertain about how to refer TANF clients to PREP workshops. However, the OMI staff used these early experiences to identify the challenges and refine their methods accordingly. They learned that while basing OMI programs in existing agencies and programs was practical, a more formal infrastructure was needed to implement and maintain marriage education services on the desired scale. Support was needed in identifying host agencies and programs, developing ongoing training, recruiting and referring participants, and providing venues for classes and programs. As another strategy to increase the scale of the program, PREP training was offered free of charge to any interested community member or local professional, including therapists, marriage counselors, and social workers. In exchange for the free training, these individuals agreed to provide at least four free marriage education workshops within their practices or organizations, or to refer interested participants to such courses.

The OMI eventually established a broad service delivery system in public sectors (including education, health, social services, corrections, and the military) and in the private sector (including the clergy, local community organizations, and individual counselors). Thus, a key strength that sustained the OMI was that it was adapted and refined based on implementation experiences. Development of this OMI service delivery structure and the implementation of OMI services in these sectors is an important focus of other briefs in this series.

How Have the Initiative's Goals Evolved?

The goals and objectives of the OMI program are continually revisited and refined as new information and knowledge comes to light. Within the first few years of the initiative, it became clear that Governor Keating's initial divorce reduction goal needed to be revised, for several reasons. Input from the OMI's Research Advisory Group (a group of nationally known experts on marriage and divorce) suggested that the goal of reducing the divorce rate by one-third within a 10-year timeframe was unrealistic, given the average length of marriages. In addition, the lengthy time period needed for planning and launching the initiative meant that significant reductions in divorce might be delayed. Another factor complicating achievement of this goal was the unreliability of marriage and divorce statistics. OMI advisor Theodora Ooms explained to OMI planners the weaknesses in the data that had been used to estimate Oklahoma's ranking as a high divorce state, and the unreliability of state data, as it was then gathered, for measuring changes in the rates. She also suggested that, by focusing mainly on divorce, Oklahoma could fail to recognize other important changes in the well-being of families and children that might occur as a result of the initiative, even in the absence of a reduction in divorce.

The OMI's goals were reformulated in collaboration with the Research Advisory Group, DHS, and OMI leadership, to address these issues and to develop a goal that is more aligned with the OMI's primary intervention strategy. The OMI's reformulated goal is to "strengthen families and build healthy relationships through readily accessible marriage education services."

The OMI by 2003

By the end of 2002, the OMI had an institutional base, a regular source of funding and, through a strong public-private partnership, was well on its way toward developing statewide capacity to provide marriage skills education. Support and funding for the OMI continued under the state's new governor Brad Henry, who was elected that year. Governor Henry asked Howard Hendrick to stay on as DHS Director, and also appointed him as the state's Secretary for Human Services. Thus the prominent level of leadership for the OMI, which was established when the OMI first began and extended to the governor's office, has continued.

Other briefs in this series describe how the OMI service delivery system was developed and implemented, along with its recent evolution and current program activities. One brief discuss efforts to build research into the OMI's design and implementation. Oklahoma recruited state and national experts on marriage, divorce, and low-income families to serve on the Research Advisory Group, which has played an ongoing role in the OMI. The state also collected data to inform the development of its initiative, including conducting a comprehensive statewide survey to assess "baseline" attitudes among its citizens toward marriage; family demographics; experiences with marriage education; and general openness to a marriage initiative. The brief also considers whether or how states might improve their use of research in the development and operation of marriage initiatives.

Evaluation Methodology for the OMI Process Study

Information reported in the OMI research brief series is based on an analysis of data gathered during an ongoing multiyear study of the initiative's design, development, and implementation. Study methodologies include semi-structured interviews with individuals and groups, direct observation of program operations, focus groups with staff and participants, and secondary analysis of data from existing reports and surveys. The research team will meet directly with some 160 individuals involved with the OMI in various ways, focusing on implementation in the education, social services, health, and community volunteer sectors, and including a special emphasis on OMI services within the state's correctional system. Mathematica's research team is led by M. Robin Dion, and includes Alan M. Hershey, Debra A. Strong, Heather Zaveri, Sarah Avellar, Nikki Aikens, and Timothy Silman.

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