



# Tools for Defining and Tracking Progress on Milestones

## Innovation Hub Grants

### Innovation in Teen Pregnancy Prevention

*For the Teen Pregnancy Prevention (TPP) program, innovation is expected to produce a broad spectrum of new or adapted products, programming, strategies, approaches, interventions, policies, and practices designed to prevent unintended teenage pregnancy and sexually transmitted infections among adolescents and promote positive youth development. Innovation requires fully understanding the nature of a problem that a population is facing, and then using time and resources to build and test a solution for that problem. Innovative solutions may involve iterating on existing practices to optimize them instead of starting from scratch. Tier 2 Innovation Hubs (Tier 2 Hubs) create structures, supports, and cultures that promote this type of innovation. Hubs have a role in developing and supporting TPP innovation using incubator, accelerator, and hybrid structures that will guide innovation development teams (IDTs).*

As teams<sup>1</sup> move along the innovation pipeline, milestones are key moments for them to assess progress. If a team defines milestones at the start of a project, they become opportunities during the innovation process to monitor progress relative to what was planned or expected.

This brief provides guidance on why milestones are important, and how to (1) define milestones during the planning period, (2) monitor progress on milestones throughout the project, and (3) share lessons learned as a team works toward and meets milestones. It is important to note that one team (like an IDT) may have a set of milestones that helps them accomplish a milestone for another team (like a Hub). Therefore, it may be useful to think about where there might be “nested” milestones.



**Milestones** are agreed-upon checkpoints in a

project marking that a set of tasks were completed or a goal was achieved.

### What are milestones, and why are they important?

Milestones help teams (1) log their progress toward achieving goals or finishing deliverables; (2) set important dates; (3) monitor deadlines and recognize bottlenecks; (4) identify successes, challenges, and lessons; and (5) outline possible next steps toward longer-term goals. They are natural points in time for teams to reflect, distill what they have learned, and pivot as needed.

Each Hub should develop and define its own milestones and timelines for making progress on them, and there is no one correct way to do so. Hubs can use their learning agendas to help decide on and document the milestones for their project and outline plans to assess progress on those milestones.<sup>2</sup> Timelines for achieving milestones will be different for each type of Hub and cohort of IDTs. Once a Hub has set its milestones, it may help to think about the role IDTs play in

<sup>1</sup> Teams can include Hubs or the IDTs they support.

<sup>2</sup> Refer to the [tip sheet on developing and using learning agendas](#) for more details.



meeting Hub milestones. Hubs may want IDTs to support Hubs in reaching their milestones, instead of having IDTs set their own milestones.

## Defining milestones during a phase

To increase the chances of success throughout the life of the project, it is a good idea to think of milestones in relation to the project’s phases. OPA has defined a set of milestones it expects Hubs to meet during the planning period. (Refer to the [Planning Period Expectations document](#).) In general, however, teams should step back and think about the various phases of their work and what they need to accomplish to move from one phase to the next. Once they define phases, they can set milestones that support the project.

Focusing on the planning phase for a Hub as an example, Hubs should go beyond milestones required by the Office of Population Affairs (OPA) and define milestones at the beginning of their project by (1) outlining key project goals and activities as milestones (which should be informed by the Notice of Funding Opportunity [NOFO] but include additional Hub-specific goals) and (2) getting input from interested parties to refine the list of milestones.

**Table 1. Innovation phases and example milestones**

Project phase	Hub milestone example	IDT milestone example	Hub and IDT milestone example
Planning	Develop IDT recruitment materials	Hold meetings with providers, parents or guardians, and youth to confirm need for innovation	Develop learning questions
Initiation	Conduct IDT application reviews and invite teams to join Hub cohort	Develop a prototype for promising innovation	Collect feedback from participants to guide pivots
Execution	Provide individual and group technical assistance to IDTs	Road test innovation	Revisit and refine the logic model and theory of change
Closeout	Host innovation exchange for all current and past IDT cohorts	Apply for new funding to support promising innovations in their next phase	Disseminate lessons learned

## Outline key project goals and activities as milestones

Hubs should consider the following when defining milestones:

- Planning period milestones in the NOFO (required)
- Activities outlined in the planning period checklist (required)
- Performance measures (for example, how many IDTs the Hub supports, number of partners, number of IDT prototypes demonstrating promise; required)
- Hub-level learning agenda, vision statement, logic model, stakeholder map, and dissemination strategy
- Hub process-oriented visual documenting each IDT’s journey through the innovation pipeline (such as phases, time frames, or end products)
- Types of IDTs in their Hub and the kind of support they may need (for example, to address gaps in capacity)
- Sharing what they learned, collaborating, and communicating with other Hubs



When developing their own milestones, teams should consider which goals, deliverables, or tasks they want to track their progress on. Teams should think about (1) *where* there are natural checkpoints on the timeline for tracking progress, (2) *what* information they can use to show they have started toward or completed a milestone, (3) *when* they should start toward or complete a milestone (relative to project progress, real time, or both), and (4) *next steps* for the team when they cannot start toward or complete a milestone.

Teams can take the following steps to define and organize each milestone:

1. **Determine the activities** they need to start or complete to make progress on the milestone, and who is responsible for those activities.
2. **Define a time frame** for starting toward or completing the milestone. This time frame could be relative to real time, project progress (that is, when to start heading toward the milestone or when to complete it, both viewed in the context of other milestones or project activities), or both.
3. **Decide** how they will measure progress toward a milestone, such as starting or completing some activity or goal, and who will decide which milestones to measure progress on—which could be, for example, completing a Hub deliverable (such as a logic model, stakeholder map, or vision statement), recruiting a certain number of IDTs into the Hub, or activities IDTs must complete before moving from one stage to the next on the innovation pipeline.
4. **Decide what the next steps** should be once a team reaches a milestone, or what to do if a milestone is not or cannot be reached. For example, does the team need to pivot or set new milestones? If so, it should start over with Step 1 in this process.

#### Example: Making progress toward a milestone

To make progress on the planning period milestone to **develop a plan to assess an IDT's innovation capacity**, Hubs may need to:

- Understand what OPA means by assessing an innovation capacity goal
- Invite partners to work with the Hub on the assessment
- Decide which key traits they expect an IDT to have to demonstrate innovation capacity
- Create a timeline
- Decide how to measure traits
- Ask innovation developers, partners, and subject matter experts to give feedback on the traits
- Have the IDT innovation capacity assessment plan reviewed by technical assistance liaisons and approved by OPA

### Involve interested parties to provide feedback on milestones

When developing milestones, teams should invite interested parties to provide feedback on them and *why* and *how* they can be involved. First, they should think about how many discussions or meetings they will need to have to develop and finalize milestones and who needs to be involved in those discussions, including staff, partners and subject matter experts, and others. Teams should practice equity and inclusion by considering who the milestones will affect and making them part of the decision-making processes that generate and finalize milestones. The right kinds of documents—such as process-oriented visuals, learning agendas, reporting requirements, and products from other innovation work—can facilitate these collaborative conversations. Teams should also consider the desired group size and whether to hold reviews and discussions about milestones, and whether outside technical assistance may be needed.<sup>3</sup>

<sup>3</sup> Hubs may request technical assistance from OPA-funded providers to address Hub-specific needs.



## Tracking progress on milestones throughout the project

Teams must also consider how they will track progress on the milestones they set throughout the project. Teams can develop or use existing tracking tools—such as flow charts, checklists, work plans, or Gantt charts—to do so. Teams should consider the following when building or using a tracking tool:



**Tip:** You can assess if you need to pivot at every milestone, including at the end of the innovation process.

- What software or format to use (for example, Microsoft Excel, Word, or Project; or a Google product)
- Whether to use color coding, formatting, or other indicators to determine progress toward a milestone
- Whether the tool should be part of a larger data system or a separate set of documents or spreadsheets
- The capacity and resources (such as time, money, and training) needed to develop and use the tool
- Whether everyone should have access to the tool, or just a subset of the team
- Whether to use the same version of the tool across teams in a community or allow individual teams to adapt it to their needs

## Assess and share learnings

Hubs should think about (1) what they might learn from tracking progress on milestones and (2) when they will pause and summarize what they learned about the innovations from their Hub and IDTs (for example, when developing the intervention, testing, refining, or pivoting). Where will they document learnings throughout the life cycle of the project? Can they create something to share knowledge with either other Hubs, IDTs, or future IDTs? Hubs can think about the types of products they might develop, including their purpose, intended audience, and timing and method of dissemination.

## Additional resources for defining and tracking progress milestones

- **TPP23 Tier 2 Innovation Hubs Expectations.** Lists the grant program's required milestones. Available [here](#).
- **Planning Period Checklist.** Can be used to track required milestones and demonstrate readiness to implement a project. Available [here](#).
- **Performance Measures for Tier 2 Innovation Hubs.** Information on which performance measures to collect in each reporting period. Available [here](#).
- **Innovation Strategy.** Information on how to develop an innovation strategy, which is a required planning period milestone. Available [here](#).
- **Stakeholder Mapping.** How to create a stakeholder map. Available [here](#).

## References

Office of Population Affairs. "Notice of Funding Opportunity: Teen Pregnancy Prevention Tier 2 Adolescent Sexual Health Innovation Hubs." U.S. Department of Health and Human Services, 2023.