

# Road testing

## Strengthening the implementation and integration of program changes

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Presentation at the National Association for Welfare Research and Statistics (NAWRS) Workshop  
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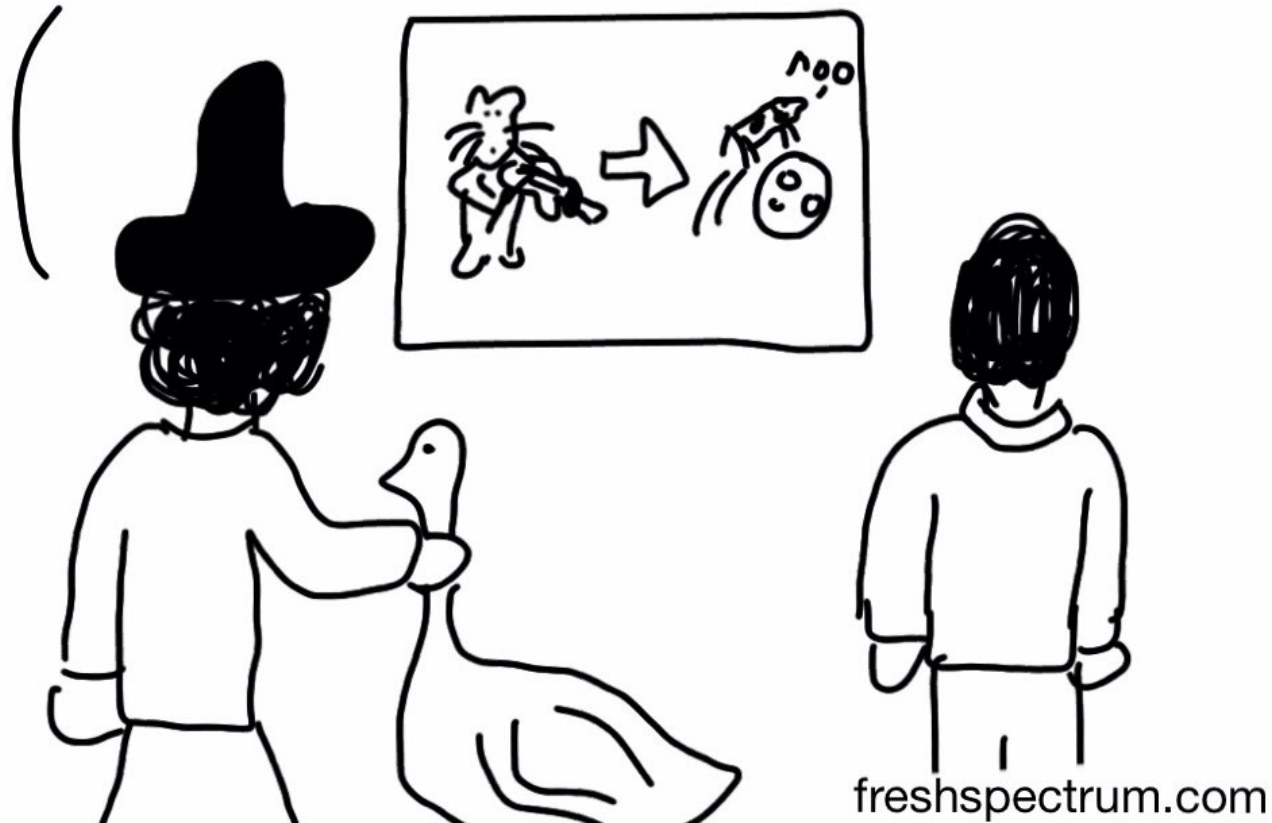
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Jonathan McCay

# Designing program change...

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You're right, after thinking it through,  
I'm not sure how the one leads to the other



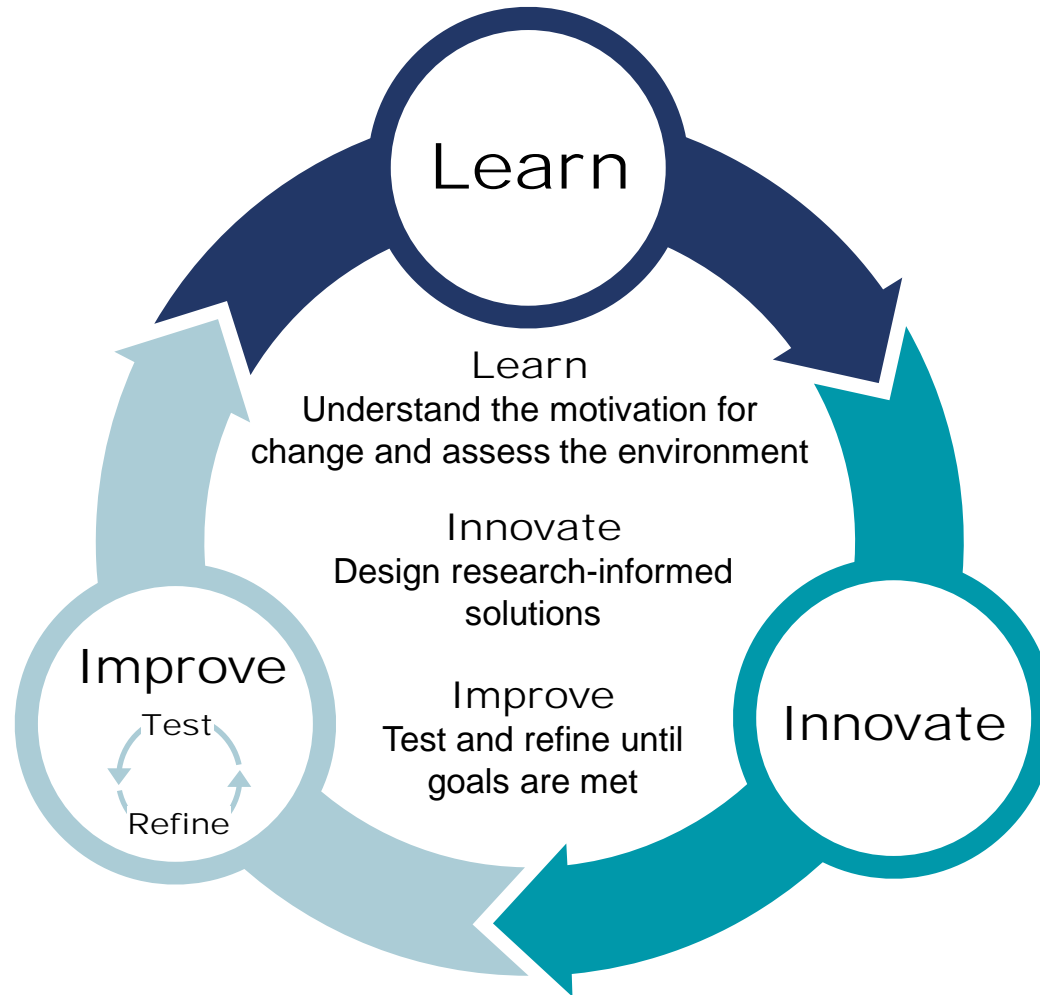
# ...could benefit from greater intentionality

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- **“Let’s run a pilot to see if it works before scaling up.”**
  - Often jumps right from the concept stage to trying to answer a question of effectiveness: *Am I seeing the outcomes I want?*
- **A missed opportunity to maximize learning from the experience of trying something new**
  - What are the underlying design assumptions?
  - What are the drivers of successful implementation?
  - What are the necessary conditions (context) for successful implementation and integration within a program environment?
- **Even “evidence-based” models and interventions are at risk of failure; context and adaptation are key**
- **Often, evaluations that find minimal or no positive impacts point to implementation issues**

# A broader framework for quality improvement

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# What is a road test?

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- **Iterative, rapid prototyping of a new strategy in order to vet, refine, and strengthen its design and implementation prior to scaling**
  - Initial implementation in a contained practice setting on a small scale
  - Gather formative feedback through thoughtfully designed questions posed to users and relevant stakeholders
  - Use data and insights to vet the underlying causal logic, identify ways to strengthen the design, and improve implementation
- **A useful road test relies upon a thoughtful diagnosis and design process**

# What is a road test?

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**Select staff**

*working with*



**a few clients each**

*trying out*



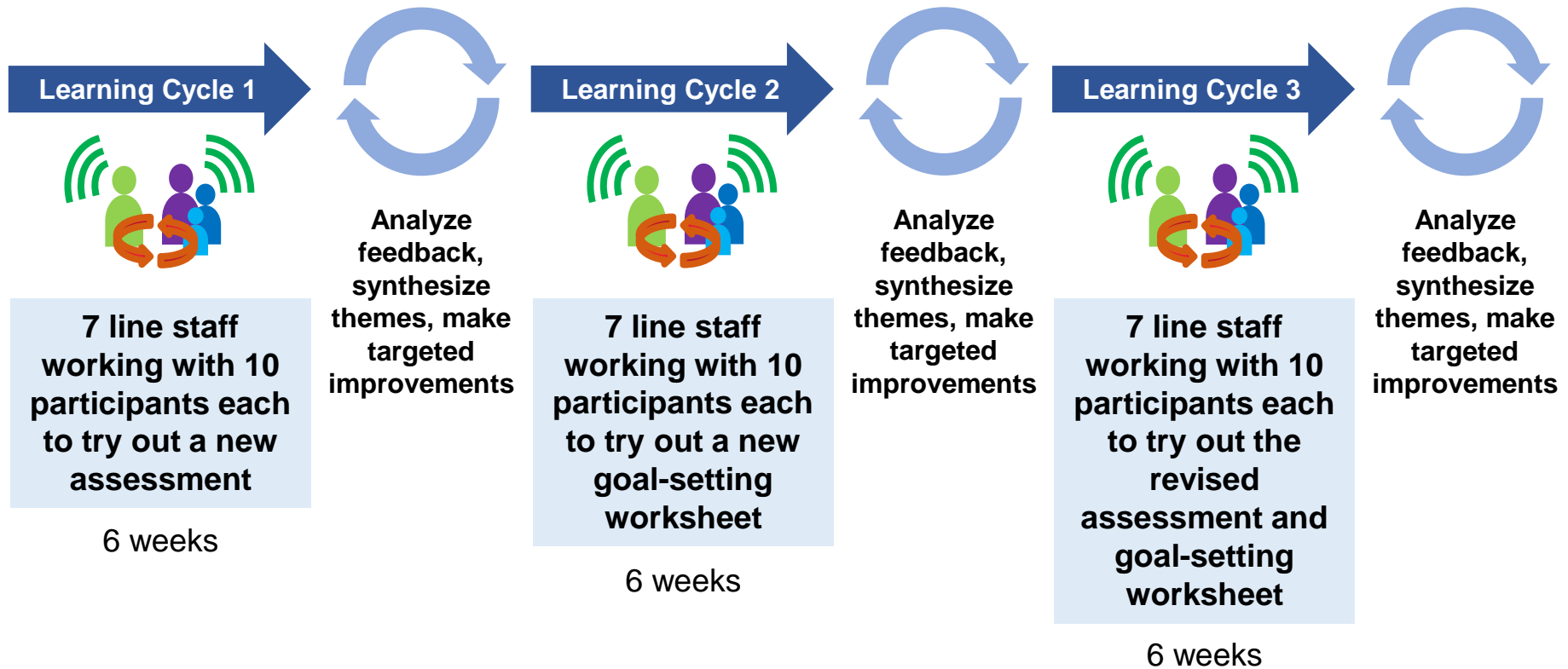
**a particular strategy**

*providing*



**targeted feedback about their experience**

# Structure of a road test

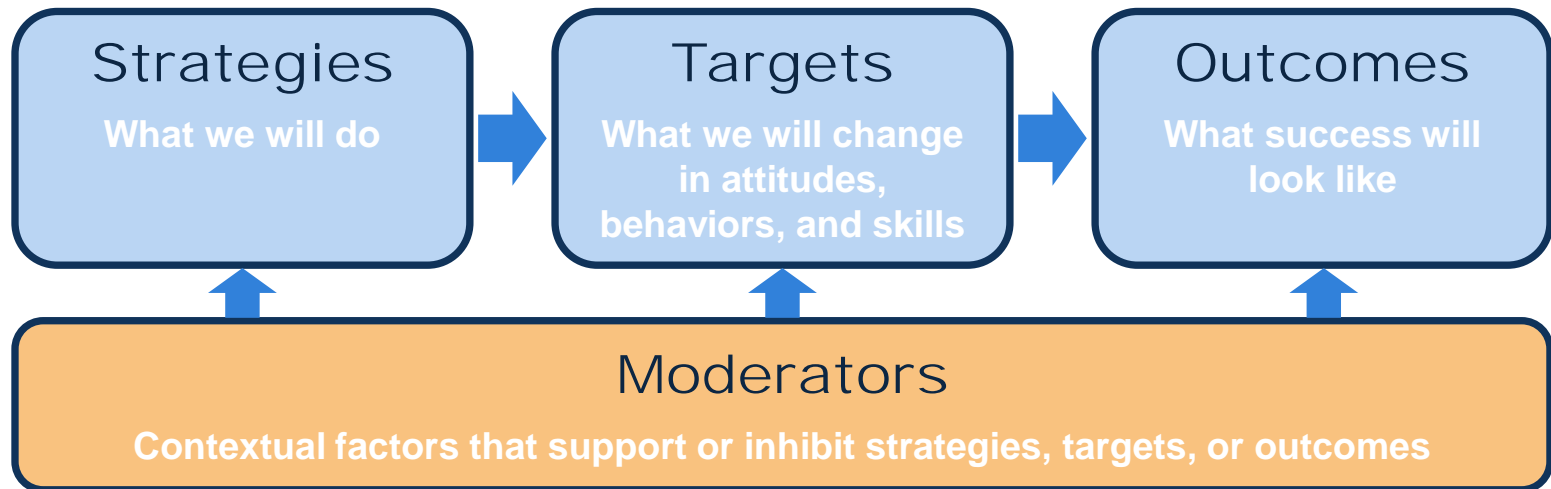


# Anchoring the road test

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- **Learning questions**

- Give focus to each learning cycle and the examination of a particular strategy
- Rooted in the causal logic of a “road map” for change





# Anchoring the road test

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- **Example learning questions**
  - What are the experiences of mentors using the goal achievement tools?
  - What types of goals are parents setting with their mentors?
  - How do customers use the online Monthly Time Sheet?
  - What are the characteristics of a successful “group WOOP” session with customers?
- **Focus on the interaction between strategies and targets**
- **Seek to understand feasibility, usability, and contextual factors that may support or inhibit successful implementation and integration with the broader set of program structures**

# Designing feedback questions

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- For every question you come up with, ask yourself:  
**Will this question help me address my learning objective?**
- **Meaningful feedback questions**
  - Are short and specific
  - Account for all relevant perspectives
  - Address considerations related to time, process, and response
- Also consider whether any available program data would help to answer your learning questions

# Gathering feedback

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- **Consider a variety of methods and choose based on efficiency and best fit**
  - Questionnaires (forms)
  - Interviews (one-on-one or group)
  - Observations
- **Take advantage of freely available online tools to create questionnaires**
- **Consider the appropriate points in time for gathering feedback**
  - When would be the best time to ask about someone's experience?

# Example road test feedback process

Timing	Staff Survey	Client Survey	Observation	Interview
Week 1	<10 min	5 min	Meeting length	15 min
Week 2	After each "road test" client meeting	At the end of a "road test" meeting	✓	
Week 3				✓
Week 4			✓	
Week 5				
Week 6				✓

# Analysis: Interpreting the feedback

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- The road test is **not** meant to—nor is it capable of—answering questions related to impact
- The focus of a road test is to identify strengths and challenges with respect to design and implementation
- In analyzing feedback, look for opportunities or concrete suggestions for improvement

# Analysis: Interpreting the feedback

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- **What seems to have worked consistently well and not so well? What was inconsistent?**
  - How might we build on and use our strengths (what has worked well)?
  - How might we address or resolve the challenges that arose (what has not worked well)?
- **What, if anything, was surprising, given expectations about how the new strategy would work?**
- **Does the feedback suggest that a given strategy seems to be leading to the intended behavioral or cognitive changes in staff or clients?**
  - In other words, does the feedback suggest that staff or client attitudes, behaviors, or skills are changing?

# Analysis: Using program data

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- **Administrative data may also offer insights about how staff or client behaviors are changing**
  - Attendance rates
  - Services/resources take-up
- **Changes observed in the data should **not** be considered evidence that the new strategy caused the changes**
  - These data provide information to suggest whether a strategy holds promise
  - Consider more rigorous testing to answer this kind of question

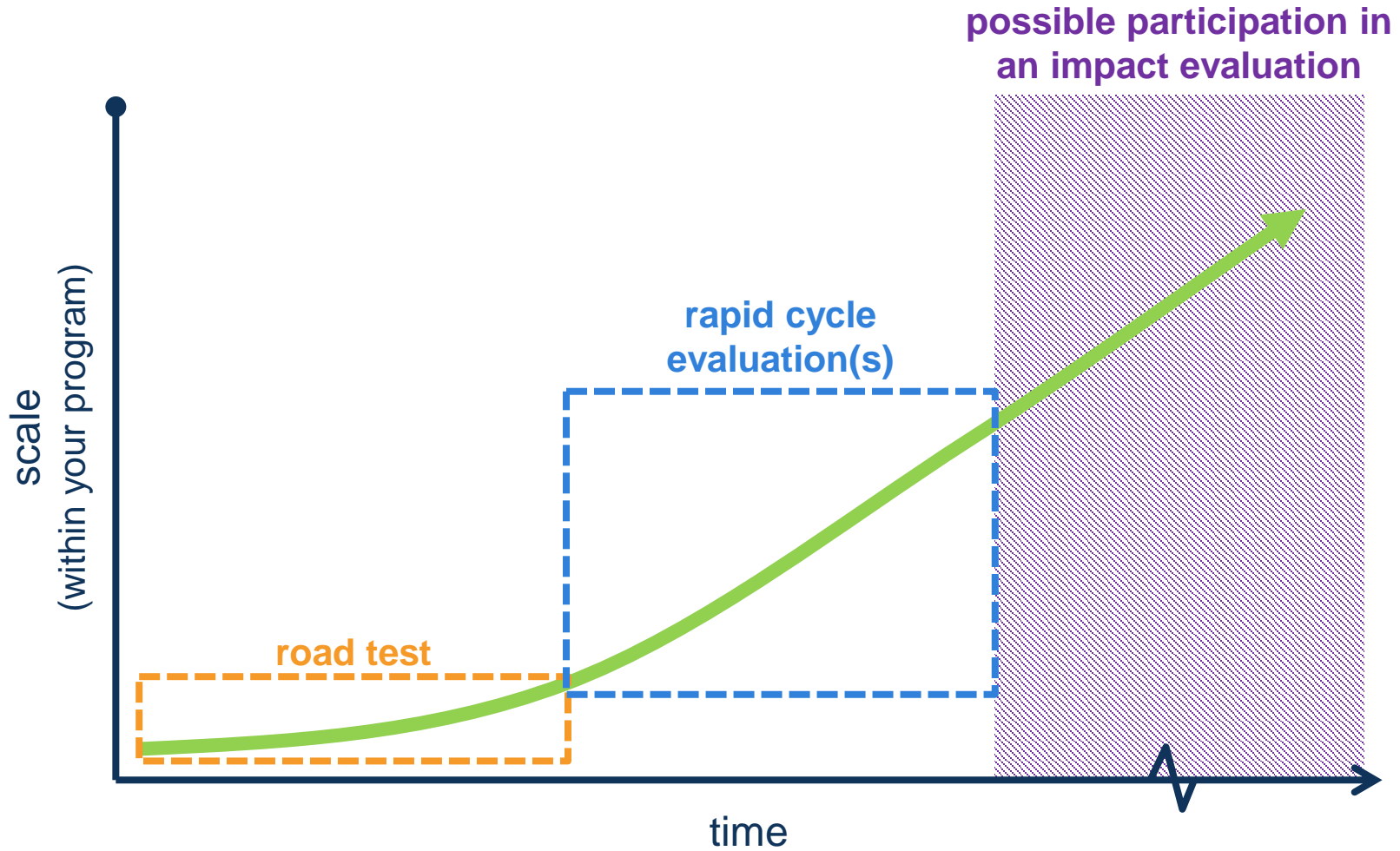
# Share, discuss, and refine

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- **Consider the themes, trends, and key takeaways from the learning cycle with your team**
  - Engage staff in brainstorming concrete solutions to the challenges and issues identified
  - Prioritize suggested changes based on feasibility and within the context of your “road map”
  - Does this change lead me to have **greater confidence** in the causal connections between my strategy, targeted changes, and outcomes?
- **If necessary, consult with a researcher about particular, evidence-based strategies to address a challenge or issue that you may have encountered**



# Continuous improvement and scaling



# What works for whom? Under what circumstances?

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- **At an individual level, the road test is designed to help you dissect the circumstances associated with success**
  - For whom is this strategy working? What are the circumstances?
  - For whom is this strategy not working? What are the circumstances?
  - Formative insight to improve your design and implementation
- **As you increase in scale, other (more rigorous) research methods can help you answer these questions at the collective or systemic level**
  - Address questions related to effectiveness and impact (did X strategy lead to Y outcome?)

# Road test “case studies”

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- **Ramsey County Workforce Solutions (Minnesota)**  
Larry Timmerman
- **Larimer County Workforce Center (Colorado)**  
Dena Jardine
- **Colorado Works Innovation Initiative**  
Pick up a copy of the Issue Brief (on-hand today)

# More info? Need support?

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- **Jonathan McCay**  
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