Using a "Road Test" to Improve Human Services Programs

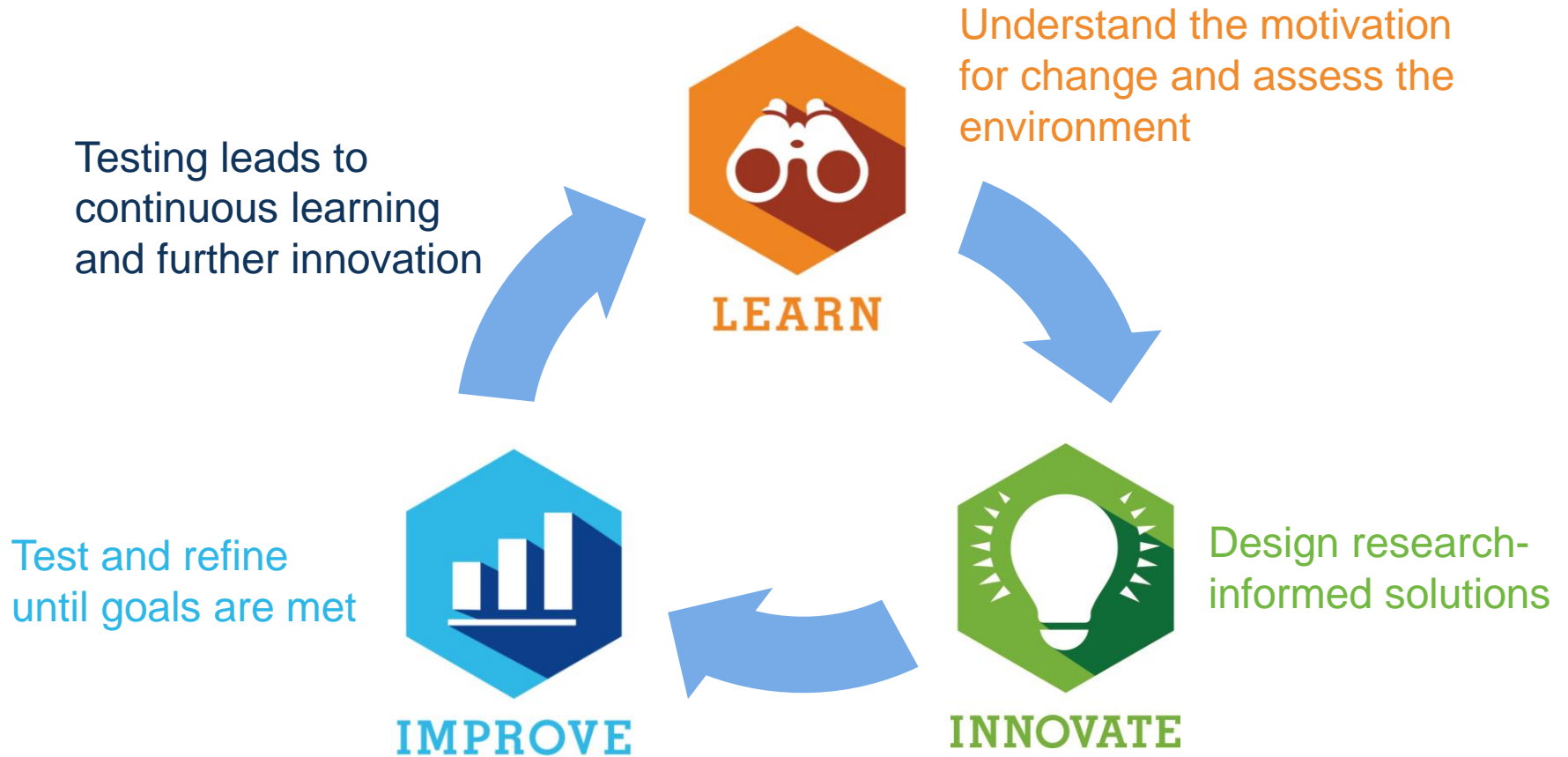Michelle K. Derr • Jonathan McCay • Ella Gifford-Hawkins • Ann Person

Our learning objectives

- **Understand the road test process and how it fits into a larger approach to managing collaborative, evidence-informed change**

- **Explore specific examples of using a road test to implement and refine programmatic changes**

- **Identify potential applications of the road test process to your work**

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Learn, Innovate, Improve (LI²)

Understand the motivation for change and assess the environment

Testing leads to continuous learning and further innovation

LEARN

Design research-informed solutions

Test and refine until goals are met

IMPROVE

INNOVATE

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Using and building evidence in program change

LI^2:

- **Applies a more analytic, intentional approach to implementing and scaling up changes**

- **Embeds research evidence and methods into the change process**

- **Encourages innovation through iteration**

- **Promotes an evidence-building progression (with on- and off-ramps)**

A collaborative and co-creative process

- **LI^2 facilitates research-practice partnerships from end to end of the program change process**
  - Interactive rather than transactional

- **Engages all levels of program staff and encourages their buy-in**

- **The road test is one part of the Improve phase**
  - A road test helps to create precision in a strategy's design, implementation, and integration
  - It is a precursor to scale up and more formal, rigorous evaluation

What is a road test?

An iterative prototyping process in which:

Select direct service staff

working with

A few clients each

try out

A new strategy or approach

and provide

Targeted feedback about implementation

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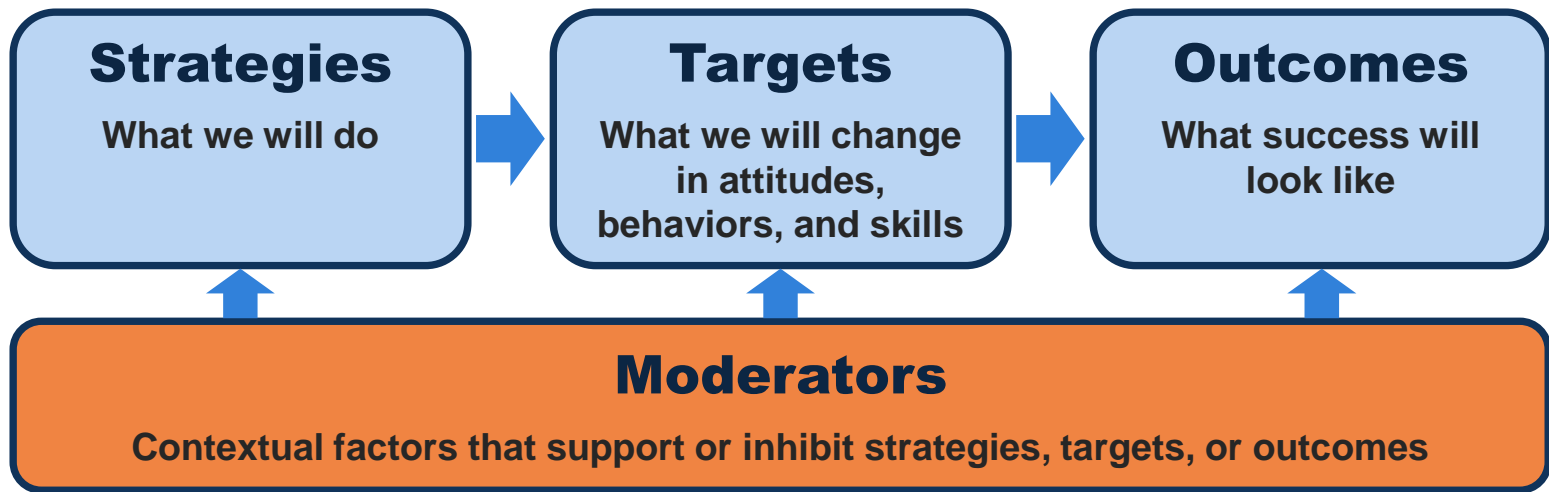
MATHEMATICA
Policy Research

Purpose of a road test

- **To examine the implementation of program change at a granular level**

- **To generate formative feedback for revising and refining the design, implementation, or integration of that change**
  - **Provides data and insight for decision-makers**

- **To facilitate innovation through a fast-paced iterative process**
  - **A road test creates the space to "fail fast"**

A road map anchors the road test

- **Framed by a set of learning objectives**
  - **What do we want to learn from this road test process?**
  - **Anchored by a "road map" for change**

Strategies	Targets	Outcomes
What we will do	What we will change in attitudes, behaviors, and skills	What success will look like

Moderators

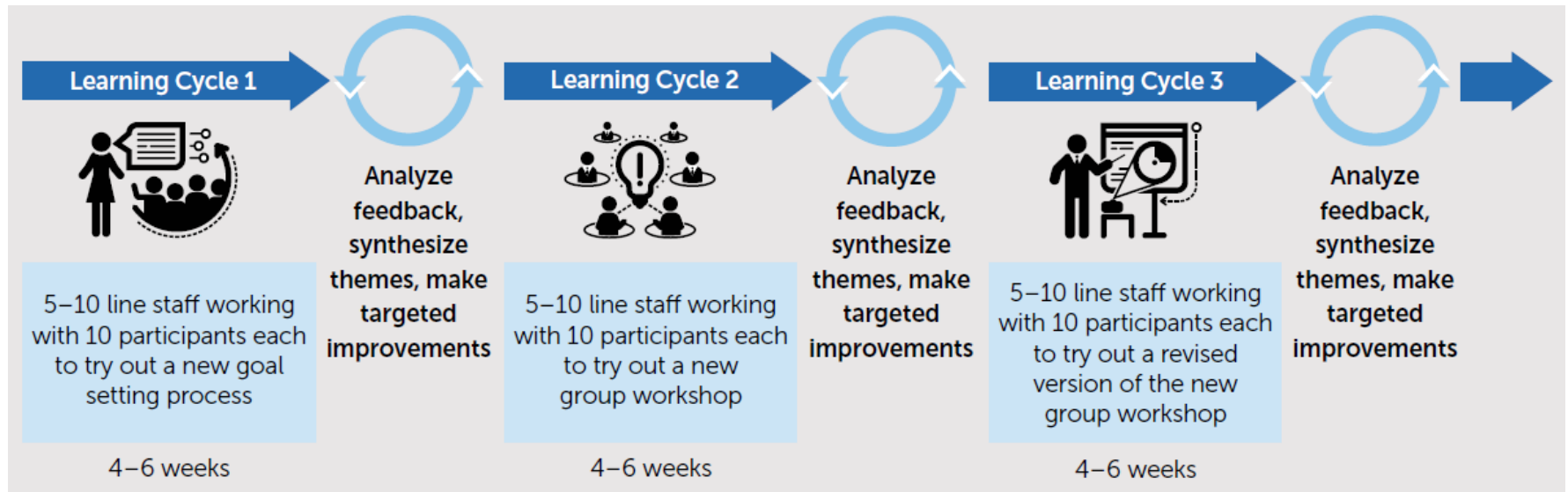Contextual factors that support or inhibit strategies, targets, or outcomes

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How does a road test work?

- **Two or more learning cycles**
  - Implement and gather feedback over a short period of time
  - Analyze, summarize, and discuss feedback
  - Identify potential refinements and revisions
  - Repeat…

- **Collect feedback in low-burden, low-cost ways**
  - Online survey/questionnaire
  - Focus groups
  - Interviews
  - Readily available program data

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An example of the road test process

Learning Cycle 1	Analyze feedback, synthesize themes, make targeted improvements	Learning Cycle 2	Analyze feedback, synthesize themes, make targeted improvements	Learning Cycle 3	Analyze feedback, synthesize themes, make targeted improvements
5–10 line staff working with 10 participants each to try out a new goal setting process		5–10 line staff working with 10 participants each to try out a new group workshop		5–10 line staff working with 10 participants each to try out a revised version of the new group workshop	
4–6 weeks		4–6 weeks		4–6 weeks	

- **Iterative adaptation and expansion of the strategy**

- **Feedback is typically gathered weekly via survey and once or twice via interview/focus group**
  - **But may be more or less frequent**

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Styles of road tests

- **Cohort approach**
  - **Each learning cycle involves a <u>distinct</u> set of staff and/or clients**

- **Group approach**
  - **Each learning cycle involves the <u>same</u> set of staff and/or clients**

- **"Boot camp" approach**
  - **A learning cycle that takes place over a shorter timeframe (about two weeks) and involves intensive (daily) feedback**
  - **Intended to immerse select staff in the implementation of a new approach**

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Analyzing feedback

- **Depending on the program's internal analytic capacity, this step will require more or less external research support**

- **Analysis is anchored by the "road map" for change and guided by the learning objectives**

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Analyzing feedback

- **Analysis focuses on identifying implementation strengths and challenges**

  – Which aspects worked consistently well? Where was there inconsistency?

- **What, if anything, was surprising given your expectations about how the new strategy would work?**

- **Does feedback reflect the changes you were targeting, or what you hoped to achieve?**

  – How are staff or client attitudes, behaviors, or skills changing?

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An accessible approach to manage change

- **Program staff can use low- or no-cost tools to gather feedback**

- **Leaders' buy-in is important to maintain momentum, but dedicated internal research staff are not required**

- **The process facilitates and promotes buy-in among direct service staff throughout the change process**

- **Reduces "change fatigue" among staff by creating the space and structure to implement and refine on a small scale**
  - **Trying, tweaking, and/or abandoning strategies happens among a select group rather than on a larger scale**

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Examples of road tests

- **San Francisco's "Project 500"**
  - **Boot camp approach**

- **Ramsey County, MN**
  - **Cohort approach**

- **Larimer County, CO**
  - **Group approach**

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Road testing in Larimer County, CO

Larimer County Workforce Center

- **Employment services provider for Temporary Assistance for Needy Families (TANF) program**
  - 650 cases on average in a given month

- **Experienced significant funding cuts**
  - An impetus to do "more with less"

- **Partnered with a local technology vendor to design and implement a new online customer service tool, *My Journey to Success***

Road testing My Journey to Success

- **A complex program change: rolling out a new IT platform for service delivery**

  – **Usability and feasibility?**

  – **Integration with existing service delivery practices?**

- **An ongoing road test process**

  – **Total of 6 learning cycles since 2016**

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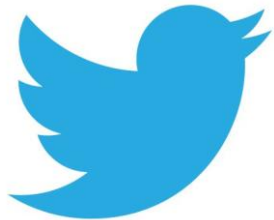
"Road testing has changed us"

- **Tackling a big change through several small steps**
  - Managing staff "change fatigue"

- **A way to quickly pinpoint what is working and what is not working as intended**
  - Opportunity to innovate and keep moving forward

- **Embracing the process of learning rather than jumping right to the outcome**

Q&A from the chat box

Other questions or comments for us?

Continue the conversation with us on Twitter after this webinar. Use the hashtag:

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For more information

- **Check out our practice briefs on road testing and the LI² process as a whole**

  mathematica-mpr.com/toolkits/li-squared

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- **Stay tuned: practice briefs on the Learn and Innovate stages are coming this year!**

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