



Building Organizational Evidence Capacity: Guides for Temporary Assistance for Needy Families (TANF) and Related Programs

July 2022

Table of Contents

Introduction and Overview // 03

How to use this guide // 08

Area 1: Leadership // 10

Area 2: Evidence-driven organizational culture // 15

Area 3: Evidence infrastructure // 20

Area 4: Staff capabilities to create and use evidence // 25

Area 5: Engagement and communication in creating and using evidence // 30

Appendix A: Menu of learning activities // 35

Appendix B: Select Human-Centered Design Activities // 36

OPRE brief: 2022-126
Project Officers: Victoria Kabak
Project Monitors: Amelie Hecht and Emily Ross
Office of Planning, Research, and Evaluation
Administration for Children and Families
U.S. Department of Health and Human Services
Project Director: Diana McCallum
Mathematica
1100 First Street, NE, 12th Floor
Washington, DC 20002-4221

Suggested citation: Michelle Derr, Alexandra Stanczyk, Jonathan McCay, and Annalisa Matri. Building Organizational Evidence Capacity: Guides for Temporary Assistance for Needy Families (TANF) and Related Programs. OPRE Report # 2022-126, Washington, DC: Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

This brief was funded by the Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services, under contract number HHSP233201500035I / 75P00119F37043.

This product was adapted from the Evidence Capacity framework developed by Mathematica on behalf of the Office of Planning, Research, and Evaluation under contract number HHSP233201500035I/75P00120F37052. We are grateful for their leadership and acknowledge the contributions of co-authors Heather Gordon, Ruth Neild, Elizabeth Alberty, Heather Zaveri, Megan McCormick, Veronica Sotelo Munoz, and Lance Bitner-Laird and project officers Nicole Deterding and Lisa Zingman.

Disclaimer: The views expressed in this publication do not necessarily reflect the views or policies of the Office of Planning, Research, and Evaluation, the Administration for Children and Families, or the U.S. Department of Health and Human Services. This report and other reports sponsored by the Office of Planning, Research, and Evaluation are available at www.acf.hhs.gov/opre.



Introduction and Overview

What is evidence capacity?

Evidence capacity means the knowledge, skills, behaviors, and resources that, together, make it possible for organizations to create and use evidence to make decisions. Wondering what we mean by “evidence”? See Box 1, below.

Research suggests that evidence capacity shows up in five key areas within organizations:



Leadership



Evidence-driven organizational culture



Evidence infrastructure (tools, resources, routines, processes)



Staff capabilities (knowledge, skills, abilities) to create and use evidence



Engagement and communication in creating and using evidence

Are you interested in creating and making better use of data and research to strengthen programs and improve outcomes for the people served by your organization? This document is for practitioners like you who are working to make their organization more informed by data and research, with a specific focus on those who operate Temporary Assistance for Needy Families (TANF) or related programs. This overview will:

- / Define “evidence capacity”
- / Describe how TANF and related programs might benefit from building evidence capacity
- / Give a vision for what an organization with strong evidence capacity looks like in TANF and related programs
- / Explain how to use this tool to build evidence capacity in your organization
- / Help you decide where to start to build your program’s evidence capacity

The overview is followed by a series of five guides—each focused on one of five key areas of evidence capacity. Organizations can use these guides on their own or in partnership with a research or technical assistance (TA) support team.

Organizations often differ in their starting point for each of the five areas. Some organizations may be stronger in one or two of these areas. Some may have room to grow across all areas. It’s important to remember that building evidence capacity is an ongoing process in all organizations. Wherever your organization starts, there is always room to grow. Even small improvements may make a big difference!

Box 1. What do we mean by “evidence”?

In the research literature, there is no single, common definition of “evidence.” In this document, by “evidence,” we mean information that helps you make decisions about how to deliver and improve your program. By this definition, evidence can include published research and evaluations; information your organization collects about your staff, programs, and participants; or practice experience and wisdom.

How might TANF and related programs benefit from building evidence capacity?

Leaders and staff face constant demands on their time and attention. Why should they devote energy to building evidence capacity? There are many reasons to expect that stronger evidence capacity will pay off for organizations, programs, staff, and the people they serve.

What does the research say?

Researchers expect that when organizations strengthen their capacity to create and use evidence, they may plan and run more effective programs, make better decisions, help all staff understand and work towards accomplishing key goals for their organization, get better at making changes when things are not working, and enhance credibility with partners and funders.¹ Some research confirms this expectation. For example, studies of interventions intended to improve organizations' evidence capacity find that these interventions may be associated with stronger program implementation and better outcomes for program participants.² That said, research in this area is new. So, we need to draw on practice experience and wisdom to help think about how organizations, programs, staff, and program participants will likely benefit from organizations increasing their evidence capacity. Additionally, as you work through these guides, you and your organization will contribute to building the knowledge base on promising practices for building evidence capacity and the associated benefits.

What do practice experience and wisdom tell us?

For over a decade, Mathematica and The Adjacent Possible (TAP) have worked with dozens of human services organizations across the U.S. to build their capacity to create and use evidence to inform program decisions and continuous improvement. Mathematica and TAP have also led numerous research projects on related topics.³ As organizations build evidence capacity, they have shared with us the following benefits:

- / Improved staff morale and retention
- / Improved organization decision making
- / Better quality and more efficient programs
- / Improved experiences and outcomes for program participants

But don't take it just from us! The following examples (in Boxes 2 and 3) show how building evidence capacity may have benefited human services organizations.

Box 2. Great Lakes Bay Michigan Works! Region embraces collecting and analyzing data to help implement a big change

Building an evidence-driven organizational culture and staff capabilities to create and use evidence. Great Lakes Bay Michigan Works! is a regional workforce collaborative that provides employment and training services for TANF, Workforce Innovation and Opportunity Act (WIOA), Wagner-Peyser, and Trade Adjustment Assistance (TAA) programs. They began their evidence building journey with limited capacity to create or use evidence to inform decisions. The organization had no dedicated research staff and limited experience with building or using research evidence to make program decisions. But they were eager to harness data and analytic methods to implement a new core practice model across their programs. With guidance from a TA and research support team, the organization learned and practiced the steps involved in designing and implementing rapid tests of this new practice model. This “learning by doing” included work to develop research questions and testing plans, collect data from staff and clients through surveys and focus groups, analyze data, and use the findings to identify and fix pieces of the new practice model that needed work. Organization leadership also implemented a regular practice of gathering and applying feedback from staff and participants to inform ongoing improvements to the practice model. Direct service staff said they love seeing how their feedback and their clients' feedback are improving the program—and staff at all levels now look for opportunities to collect and analyze data to help identify and implement improvements across the organization.

Benefits to the organization. Building the staff capabilities and organizational culture needed to regularly collect and analyze data to make organizational and program improvements helped Great Lakes Bay Michigan Works! to slow down—to be more inclusive, intentional, and systematic—in how they gather and use feedback. Staff and leadership report these changes have helped them secure buy-in for changes and maintain morale and resilience in the challenging COVID-19 context.



¹ James Bell Associates. “Building Evaluation Capacity in Human Service Organizations.” Arlington, VA: James Bell Associates, November 2013.

² Stanczyk, Alexandra, Mary Anne Anderson, Armando Yañez, and Lauren Amos. (2022). Project SPARK: Landscape Analysis of Evaluation Technical Assistance to Build the Evaluation Capacity of Human Services and Related Programs. OPRE Report # 2022-87, Washington, DC: Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

³ For example, the Supporting Partnerships to Advance Research and Knowledge (SPARK) Project; Advancing Welfare and Family Self-Sufficiency Research Project and Follow-on (AWESOME); Project IMPROVE; and the Family Self-Sufficiency Demonstration Development Grants and Evaluation Support Project.

Box 3. Iowa Family Development and Self Sufficiency program leads focus groups with program participants to inform improvements ⁴

Fostering broad engagement and communication in creating and using evidence. Iowa’s Family Development and Self-Sufficiency (FaDSS) program is a statewide home visiting program that provides employment-related coaching to families with low incomes who face complex challenges to employment. The FaDSS leadership team wanted to learn how the program supervisors and family development specialists adapted to providing services virtually during the COVID-19 pandemic and how those changes influenced the families they serve. With guidance from a TA and research support team, the organization learned new approaches to engaging diverse perspectives and establishing feedback loops as they created and used evidence. For example, they learned to conduct surveys of family development specialists and their supervisors and to collect data through in-depth conversations with participant families. The organization then learned to analyze the data collected and bring findings back to program leaders and specialists to make meaning of the findings and seek their input for potential solutions. This data collection and analysis helped the organization better understand how family development specialists and families were experiencing through virtual services and explore the possibility of a hybrid approach once they could meet in person. In looking at a potential hybrid model, they revisited their performance standards and measures for the program. What they found is that the performance standards and measures for the FaDSS contracted service providers were not working well to support a high-quality program. Armed with this information, the FaDSS leadership team recently moved on to collecting and analyzing more data from family development specialists and supervisors to figure out how to improve the performance measures.

What does an organization with strong evidence capacity look like?

When starting to make a change to improve your organization’s evidence capacity, it can be helpful to have a vision of what strong evidence capacity might look like in your organization. The table below gives examples of what it looks like when an organization has strong evidence capacity in each of the five areas (see Box 4 to learn where this vision came from). This vision of strong evidence capacity may feel a long way off for many organizations. That’s okay! The five worksheets in this toolkit will help you get there, one step at a time.

Box 4. Where does this vision of strong evidence capacity come from?

To develop the five areas of evidence capacity and the vision of what represents strong evidence capacity for each, we drew on a review of research papers that: (1) contained an evidence or evaluation capacity framework, and (2) were published in the last 15 years. For more information on these methods and details on evidence capacity see see the [Evidence Capacity Framework brief](#) (forthcoming as of July 2022).



⁴ For more on Iowa’s experience building evidence capacity, see Derr, Michelle K., Ryan Ruggiero, Lorie Easter, Page Humphrey, Ella Gifford-Hawkins (2022). Learning to Enhance Strategies for Coaching Families Virtually: Lessons from Iowa’s Family Development and Self-Sufficiency Home Visiting Program, OPRE Report #2022-56, Washington, DC: Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

Table 1. A vision of an organization with strong evidence capacity

Area of evidence capacity	What an organization with strong evidence capacity in this area looks like
1. Leadership	<div>Leaders in our organization use evidence when they make program changes and set budget priorities. For example, choosing evidence-informed program models or incorporating information about current practices into program revisions and budget requests.</div> <div>Leaders in our organization set aside funds for research, evaluation, and other evidence-building activities.</div> <div>Leaders organize staff with clearly defined roles and in ways that support building and using evidence well.</div> <div>Leaders in our organization make sure staff have the time and support they need to build and use evidence well.</div>
2. Evidence-driven organizational culture	<div>Our organization values using and building evidence. We dedicate time and resources to it.</div> <div>Our organization dedicates time to learning and reflection.</div> <div>Our organization applies evidence to continuously improve our programs, practice, decisions, and operations.</div> <div>When our organization uses and builds evidence, we involve and value diverse perspectives.</div>
3. Evidence infrastructure	<div>Our organization has the technology and procedures we need to collect, store, access, and analyze data.</div> <div>Our organization routinely uses the data to track progress towards our goals.</div> <div>Our organization has and uses a formal continuous quality improvement process.</div>
4. Staff capabilities to create and use evidence	<div>Relevant staff at our organization can use data to answer key questions.</div> <div>Our organization supports staff to grow their knowledge, skills, and abilities to create and use evidence.</div> <div>Relevant staff at our organization keep everyone informed about our work to build and use evidence. They communicate clearly when they talk about data and evidence.</div>
5. Engagement and communication in creating and using evidence	<div>Leaders and staff at our organization routinely engage, learn from, and work collaboratively with each other, partner organizations, community members, and program participants.</div>

How to use this series of five guides to build evidence capacity

Ready to dive in? These five guides will walk you through a process that can help your organization build evidence capacity. There is one guide for each of the five areas of evidence capacity. Your organization can use the guides in partnership with a research or TA support team, but you can also walk through the steps on your own. To start, try choosing just one area to work on. Not sure what area to choose first? See Box 7, below! Having trouble getting buy-in? See Box 6, above! Then, follow the steps in the guide for the evidence capacity area you picked. These steps will walk your organization through a series of reflection questions and activities that will help you to:

- Assess your organization’s current evidence capacity in the given area
- Narrow your focus and prioritize an opportunity for change
- Define the change your organization will make
- Make a plan for measuring progress toward that change

As you work through this process, try to focus on changes that are within reach for your organization. Even small improvements in evidence capacity are beneficial and may make a big difference!



Box 5. Getting buy-in for building evidence capacity across your organization

Sometimes it can be hard to get staff at all levels of your organization to see the value in creating and using evidence. You can share the case examples above (Boxes 4 and 5) to help explain why building evidence capacity can be beneficial across your organization. It could also be helpful to ask key staff what challenges they are facing. Then, think through how small changes to build evidence capacity might help address these challenges. Side conversations along these lines with staff who are especially reluctant are another strategy to consider. You can also try identifying a staff person who is really excited about building evidence capacity to serve as a champion for this work in your organization. They can help you gather buy-in broadly.

Further reading

Interested in learning more? Check out these resources on evidence capacity and evidence capacity building:

Agency for Healthcare Research & Quality. "Collect and Use Data for Quality Improvement." Available at <https://integrationacademy.ahrq.gov/products/playbooks/behavioral-health-and-primary-care/implementing-plan/collect-and-use-data-quality-improvement>. Accessed September, 9, 2020.

AmeriCorps and Corporation for National and Community Service (CNCS). "Laying the Groundwork Before Your First Evaluation." 2015. Available at https://www.nationalservice.gov/sites/default/files/resource/Laying_the_Groundwork_Before_Your_First_Evaluation_Slides.pptx. Accessed July 10, 2020.

Bourgeois, I. and J.B. Cousins. "Understanding Dimensions of Organizational Evaluation Capacity." American Journal of Evaluation, vol. 34, no. 3, 2013, pp. 299-319. <https://doi.org/10.1177%2F1098214013477235>

James Bell Associates. "Building Evaluation Capacity in Human Service Organizations." Arlington, VA: James Bell Associates, November 2013. https://www.acf.hhs.gov/sites/default/files/documents/opre/research_and_evaluation_capacity_resource_guide_updated_508.pdf

Stanczyk, Alexandra, Mary Anne Anderson, Armando Yañez, and Lauren Amos. (2022). Project SPARK: Landscape Analysis of Evaluation Technical Assistance to Build the Evaluation Capacity of Human Services and Related Programs. OPRE Report # 2022-87, Washington, DC: Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

How to decide where to start

Not sure which of the five areas of evidence capacity to work on first? The following reflection questions can help. Review the descriptions of the five areas of evidence capacity in Table 1, and then consider:

In what area is your organization most motivated to make a change? Starting where your team feels most motivated can help make change happen! Are you interested in focusing on strengthening leadership, organizational culture, engagement and communication, staff capabilities, or your evidence infrastructure?

In what area do you see the most potential for impact? Why is that impact important to your organizational mission, vision, or goals? You could choose to tackle an area where you have a lot of room for growth, recognizing that it might take a while to see your efforts pay off.

Of those areas where you feel most motivated, in which are you closest to strong evidence capacity? Building on an area where you are

already strong could be a good place to start and demonstrate quick wins that will motivate people to keep working in other areas.

In what area do you think you might use a lot of effort without achieving much? You can choose not to work on areas where you might invest a lot of effort but gain little in return. Instead, consider holding off on those until your organization is stronger in other areas. If an area doesn't jump out at your team right away, then just choose any guide and start working through the process. You can always pivot to a different area if you find it isn't the right area to build capacity right now.





How to use the guide

This guide gives your organization a series of steps designed to help you reflect on and assess your evidence capacity within an area you choose: (1) leadership, (2) evidence culture, (3) evidence infrastructure, (4) staff capabilities, (5) engagement and communication. Revisit the overview of this guide to learn more about each area and explore the benefits of building evidence capacity. To facilitate the process of building evidence capacity in an area, we strongly encourage you to use the participatory activities (which can be done in teams) highlighted in this guide and in the appendices. While we have numbered each of these areas, you do not have to tackle them sequentially. Jump in! Start with the area you want.

Once you identify the area of evidence capacity you want to improve, then assemble a team to walk through the change process. Using a change management framework or process model might help you build evidence capacity in your selected area. In this guide, we use Learn, Innovate, Improve (see the [LI2 Practice Guide](#)). You could use a different process, such as the [Getting to Outcomes Framework](#) or the [Breakthrough Series Collaborative](#), which uses “Plan, Do, Study, Act” to facilitate iterative improvement cycles. If you do use a different process, we recommend that you still use the assessment questions, good practices, and examples in Step 1 of each evidence capacity area to guide your thinking, as they are drawn from an evidence

scan of many approaches for building evidence capacity (see Box 5 in the overview of this guide). Also, as you work through this process with your team, please take time to document your answers to the reflection questions along with other insights and plans, either using the evidence capacity area guides or a separate document. This can help you to be more intentional and systematic in making sense of the information you gather and deciding what to do next.

Next, we describe an approach to working through the change process based on LI2.

Step 1. Learn: Reflect and assess

The guides include a table that focuses on the area of evidence capacity you want to change. It includes reflective questions, good practices based on existing research, and examples that draw from practice experience and wisdom. Throughout the process, be inclusive—include people with diverse perspectives and experiences.⁵ As you gather feedback, consider whether the members of your organization (at varying levels and positions of power) are comfortable giving you honest and constructive input.

⁵ Frierson, Henry, Stafford Hood, Gerunda Hughes, and Veronica Thomas. “A Guide to Conducting Culturally Responsive Evaluations.” In *The 2010 User-Friendly Handbook for Project Evaluation*, edited by Joy Frechtling. Arlington, VA: National Science Foundation, 2010.

Box 6. The value of diversity and inclusion in building evidence capacity

Diversity is the inclusion or involvement of people from a range of different social, ethnic, and cultural backgrounds as well as other dimensions of personal identity, position, and experience. Engaging a diverse group of people to strengthen your evidence capacity is valuable because it allows you to uncover hidden assumptions, surface biases, and areas of marginalization or exclusion within your organization. To achieve diversity, incorporate many different perspectives as you work through the guides. Although this process might seem messy or logistically challenging, by including a diverse group of people to give input on the questions, you will be more confident in your conclusions, and you are likely to get more buy-in from those who participated in the process. As a leader, practice humility and seek to understand how each person is bringing their unique culture, experiences, and perspectives to the table. Strive to challenge and question your own assumptions about cultures or experiences that are different from your own as you work through this process with your team. area to build capacity right now.



Step 2. Learn: Narrow your focus

Taking what you learned in Step 1, narrow your focus, prioritize a specific area for change that people can agree on, and reflect on how ready your organization is to make the change. Use the “Questions for reflection and actions” table to help you identify the changes to evidence capacity your organization or team is committed to make. There will almost certainly be more potential changes than you can reasonably take on. Work with your team to help narrow your focus to one change within a given area—even if the change you can make in that area is small. You can always circle back to make more changes later.

Step 3. Innovate: Define the change

You have narrowed in on something you want to change. Now, begin the process of mapping out the change and how you will make it happen. Start at the end: what do you think success will look like? This process grounds your work in a vision of what you expect to be different. As you plan, think both about who will change, what you will change, and how you will make the change happen. The key is to first “think outside the box,” and then get precise in defining what you will do, how you will do it, and how you will measure success. Consider changes that are aspirational yet feasible.

Step 4. Improve: Reflect, learn, and refine

Before you carry out your change, take some time to plan how you will measure your progress. Consider who and what will be affected by your change. What do you want to learn from trying out this change? How can you gather data or input on how the change is going? Once you start making the change, take steps to understand in real time what is working for whom and under what circumstances. Gather relevant data and feedback from those who have a stake in the change as they experience it, and remember to include diverse perspectives. It will improve your change process and results. Once the change is carried out and sufficient time has passed for your team to experience the change, gather your team to discuss and make sense of the data—what themes or trends are we seeing? What other questions do the data raise? What might we change or do differently based on what the data show? This leads you right back into your next learning phase where you can pose new questions and begin to experiment with tweaks and other changes in the spirit of continuous, ongoing improvement.



Area 1: Leadership

Leadership as a key area of evidence capacity means decision makers identify opportunities to build evidence, foster evidence culture, allocate resources to support research activities, and make decisions transparently and based on evidence.



Objectives of each step

Steps 1 & 2. Reflect and assess, then narrow your focus (Learn phase)	Step 3. Define the changes (Innovate phase)	Step 4. Check your success: reflect, learn, and refine (Improve phase)
<ul style="list-style-type: none">/ Explore how and for what purposes your program leaders encourage the routine use of evidence/ Unpack your organization’s readiness for change to improve the ability of leaders to become more evidence-driven in their work.	<ul style="list-style-type: none">/ Identify potential changes leaders at multiple levels in the organization (for example, program managers, supervisors, team leaders) are willing and able to make to build their evidence capacity./ Construct a plan for making these changes./ Consider how your organization might benefit from these changes.	<ul style="list-style-type: none">/ Implement the change./ Gather data on your progress; reflect; then make any necessary changes to your approach./ Continue to monitor progress, reflect, and refine, as needed./ Consider additional changes you might make in other areas (return to the Learn phase).

Step 1. Reflect and assess

Begin learning by collaboratively reflecting on and assessing how your current leadership practices allow your organization to use and build evidence. The table that follows suggests several different ways to reflect on how program leaders operate at all levels within the organization, including how decisions are made, how extensively budgets support using evidence, how teams are supported to use evidence, and the incentives and disincentives for leaders to incorporate an evidence-driven approach in their work. The table includes reflection questions with bolded text to flag the concepts identified in our scan of existing research on approaches for building evidence capacity. It also includes good practices or indicators for building evidence capacities in the area of leadership, and examples that represent practice experience and wisdom from the field.

As you work through this activity, consider several different methods for data collection such as team discussions, structured surveys, human-centered design activities—or some combination (see Appendix A for descriptions of these methods). Where possible, seek feedback from program leaders, direct service staff, community partners, and, when appropriate, program participants. Including diverse perspectives will shed light on challenges the team may not have considered. Step 1 might take a few sessions during a single week or it could take multiple sessions over several months—depending on the questions you want to answer and the methods you use to answer them to assess your evidence capacity in this area.

Activity: Reflect on and assess organizational leadership

Reflection question	Descriptions of good practice	Examples from the field
<ul style="list-style-type: none"> / How do your leaders incorporate evidence into regular decision making or for continuous improvement? / What are some examples? 	<ul style="list-style-type: none"> / Leaders incorporate evidence into decision-making, modeling for the organization how to modify plans and take next steps based on evidence. / Leaders consistently identify opportunities for the organization to build and use evidence. 	<ul style="list-style-type: none"> / Pilot or road test a change to refine an intervention and/or implementation of the new practice before a full rollout. / Explore existing evidence-based models and practices through an online clearinghouse (such as Pathways to Work Evidence Clearinghouse) before deciding on a change to programming
<ul style="list-style-type: none"> / How does the composition of your team support the use and build evidence? / What are some examples? 	<ul style="list-style-type: none"> / Leaders assemble a team and allocate staff in clearly defined roles to build and use evidence. 	<ul style="list-style-type: none"> / Designate staff positions for data collection and analysis. / Incorporate quality data collection and reflection into staff job descriptions. For example, timeliness and accuracy of data collection. Regular review of outcome reports during biweekly sessions with a supervisor.
<ul style="list-style-type: none"> / Are funds or other resources set aside for evaluation activities? What kinds of resources? / How is evidence used to inform budget priorities? / How extensive is this use of evidence? 	<ul style="list-style-type: none"> / Leaders use budget development activities to advance evidence building and use in the organization. Within existing budget constraints, leaders seek to allocate resources to evidence-building activities. 	<ul style="list-style-type: none"> / Allocate funds to support simple data collection and analysis to understand a problem or program change (such as a pilot or road test) or for more rigorous evaluation. / Invest in services and activities that, based on evidence, might produce the best results.
<ul style="list-style-type: none"> / In what ways do your leaders support teams at all levels to consistently use and build evidence in their work? 	<ul style="list-style-type: none"> / Leaders ensure staff have the time and support they need to build and use evidence. / Leaders foster innovation and advocate for staff to spend time learning the latest advances in their respective fields. 	<ul style="list-style-type: none"> / Organize regular team “huddles” to identify program challenges and co-create solutions. / Transparently share performance data and engage staff in making sense of the data for potential improvements to programming.



 **Capture your findings, reflections, and “aha” moments here.**

Step 2. Narrow your focus

Based on your assessment in Step 1, it's time to create some consensus and cohesion within your team about the priority takeaways and next steps. This process can be quick. See Appendix B for examples of how your team could use a human-centered design activity or other prioritization activities to narrow your focus. These activities provide a process for reaching agreement about potential change(s) you could implement to build the capacity of leaders and to incorporate evidence in their everyday work.



Activity: Reflect and identify potential actions

- / Where are you most motivated and able to make a change in your leadership practice that would build evidence capacity?

- / Who are the key partners that should help design and execute the change(s)? What roles might they play?

- / What factors might help or hinder your success—for example, level of motivation, bandwidth, availability of resources, level of influence or power?
- / What is your readiness for change—individually and as an organization? why?



Capture your findings, reflections, and “aha” moments here.



Step 3. Define the changes

You have narrowed in on something you want to change. Now, begin the process of mapping out the change and how you will make it happen. Start with your picture of success—this grounds your work in a vision of how you expect things to be different. As you plan, think both about who will change, what you will change, and how you will make the change happen.

How you might facilitate innovation

Building on Steps 1 and 2, Step 3 will also require you to explore several possibilities for designing the change, and then build consensus around a plan for change. Embrace the idea that defining and carrying out the change is likely to be an iterative process.



Explore possibilities. Start by bringing people together again—perhaps some or all of those who participated in Step 1 (Reflect and Assess)—to explore possibilities for defining the change you hope to see. The key is to think outside the box first, then get precise in defining what you will do, how you will do it, and how you will measure success. Consider changes to your leadership practices that are aspirational, yet feasible. Also, include people who represent diverse perspectives. It will improve buy in and improve the quality of the change.



Build consensus. Your next step is to start prioritizing the options. Consider using a human-centered design method such as “bullseye diagramming” or an “effort-to-impact matrix” to work through a prioritization exercise together. Keep it narrow and focused, aspirational yet realistic. See Appendix B for guidance on each of these activities.

Activity: Define the change, create a plan, and envision results

The Change

The Plan (what, how, who, when)

Anticipated Results (How will you know if you are successful?)

Step 4. Check your success: Reflect, learn, and refine

Measuring change takes time and intentionality, which can be difficult to come by in the busyness of day-to-day work. However, if you don't prioritize this step, you miss a key opportunity to learn from the successes and failures of your well-intentioned changes and to use this information to make refinements to your approach to change.

To check your success, ask how will you know if you have made a difference? Create a data collection plan for answering this question. After making the change, reflect on how it went by executing your data collection plan and reviewing and summarizing the resulting findings. In what ways did you accomplish what you set out to do?

In answering both questions, strive to include diverse perspectives and question your own assumptions about the answers. Doing so will help you better understand the effects of your change in building evidence capacity.



Activity: Reflect and course correct

How will you know if you made a difference? (Develop a data collection plan before rolling out your change)

What do you want to learn? (Learning objectives)

What is your plan for testing the change (who, what, where, when, how)?

How will you measure success?

How can you make this process more inclusive and culturally responsive?

Did you accomplish what you set out to do? (Summarize your findings after rolling out your change)

What worked well about your change?

What didn't work so well?

What did you learn?

Based on your results, what will you do?



Area 2: Evidence-driven organizational culture

Evidence-driven organizational culture is one in which your organization’s mission, objectives, and program design reflect a routine use of evidence to guide decision making.



Objectives of each step

Steps 1 & 2. Reflect and assess, then narrow your focus (Learn phase)	Step 3. Define the changes (Innovate phase)	Step 4. Check your success: reflect, learn, and refine (Improve phase)
<ul style="list-style-type: none">/ Explore how and how much your organizational culture values and routinely supports evidence./ Unpack your organization’s readiness for change to create a more evidence-driven organizational culture.	<ul style="list-style-type: none">/ Identify potential changes leaders and staff are willing to make to create an evidence-driven culture./ Construct a plan for making these changes./ Consider how your organization might benefit from these changes.	<ul style="list-style-type: none">/ Implement the change./ Gather data on your progress; reflect; then make any necessary changes to your approach. Continue to monitor progress, reflect, and refine, as needed./ Consider additional changes you might make in other areas (return to the Learn phase).

Step 1. Reflect and assess

Begin learning by collaboratively reflecting on and assessing your current organizational culture and the extent to which it is evidence-driven—in other words, your evidence culture. The table that follows suggests several different elements of evidence culture you can focus on. These include your organization’s commitment to using evidence; how your organization supports a learning culture; your commitment to diversity, equity, and inclusion at the organization level in efforts to use and build evidence; and the value your organization places on using research and evaluation. The table includes reflection questions with bolded text to flag the concepts identified in our scan of existing research on approaches for building evidence capacity. It also includes good practices or indicators for building evidence capacities in the area of evidence culture, and examples that represent practice experience and wisdom from the field.

As you work through this activity, consider several different methods for data collection such as team discussions, structured surveys, human-centered design activities—or some combination (see Appendix A). Where possible, seek feedback from program leaders, direct service staff, community partners, and, when appropriate, program participants. Including diverse perspectives will shed light on challenges the team may not have considered. Step 1 might take a few sessions during a single week or it could take multiple sessions over several months—depending on the questions you want to answer and the methods you use to answer them to assess your evidence capacity in this area.

Activity: Reflect on and assess evidence-driven organizational culture

 Capture your findings, reflections, and “aha” moments here.

Reflection question	Descriptions of good practice	Examples from the field
<div> <div>/ Describe your organization’s commitment to the use of evidence.</div> <div>/ What are some examples of that commitment?</div> </div>	<div> <div>/ The organization provides staff and supports for building and using evidence in its many forms (such as performance measures, program evaluations, and foundational fact-finding).</div> <div>/ Other factors and conditions are in place, such as documented priorities; timely sharing of data and findings; constructive feedback; defined needs for information; and credible, accessible, and clearly communicated findings.</div> <div>/ The organization uses change management processes to apply evidence to improve service delivery continuously, with the goal of improving outcomes and achieving the organization’s mission.</div> </div>	<div> <div>/ Ask a seasoned researcher or use the Pathways to Work Evidence Clearinghouse to pull together existing research on interventions or program strategies before making a change.</div> <div>/ Adhere to a general rule that all major program changes must first undergo a pilot phase, structured by research questions and feedback loops to understand how the change will affect people and what might be done to strengthen its implementation.</div> </div>
<div> <div>/ What strategies are used to cultivate a learning mindset that prioritizes and dedicates time for learning and reflection within your organization?</div> <div>/ What does this process look like in your organization?</div> </div>	<div> <div>/ Staff are inquisitive and willing to try new approaches and assess progress using evidence.</div> <div>/ Leaders encourage and model innovation, learning, and reflection.</div> <div>/ Processes are in place to facilitate knowledge transfer across the organization.</div> </div>	<div> <div>/ Organize an innovation initiative that includes using and building evidence to tackle a practice challenge; focus on the lessons learned and how staff might apply the lessons to improve outcomes.</div> <div>/ Organize quarterly “data dives” where all staff are invited to participate in discussion groups about the organization’s performance data and pose questions for further inquiry or research.</div> </div>
<div> <div>/ In what ways does your organization include equitable and inclusive practices when using and building evidence?</div> <div>/ In what ways does your environment promote the involvement, respect, and connection of people throughout the organization?</div> </div>	<div> <div>/ Organizational culture promotes involvement, respect, and connections among team members to channel a range of perspectives and experiences into evidence activities.</div> <div>/ When designing and conducting evidence activities, the organization uses participatory methods to engage program clients and community members.</div> <div>/ The organization uses a culturally responsive and equitable approach to research activities to ensure that questions and methods promote equitable access, participation, and outcomes.</div> </div>	<div> <div>/ Offer paid work experience opportunities for people with lived experience. Invite them to help design and test program improvement strategies.</div> <div>/ Present evaluation findings at a staff meeting; ask for input to understand and apply the findings.</div> </div>

Step 2. Narrow your focus

Based on your assessment in Step 1, it’s time to create some consensus and cohesion about the priority takeaways and next steps. This process can be quick. See Appendix B for examples of how your implementation team could use a human-centered design activity or other prioritization activities to narrow your focus. These activities provide a process for reaching agreement about potential change(s) you could implement to strengthen the role that evidence plays in your organizational culture.



Activity: Reflect and identify potential actions

- / Where are you most motivated and able to make a change in your organizational culture that would build your capacity to use and build evidence?

- / Who are the key partners that should help design and execute the change(s)?
- / What roles might they play?

- / What is your readiness for change—individually and as an organization? Why?
- / What factors might help or hinder your success—for example, level of motivation, bandwidth, availability of resources, level of influence or power?

 Capture your findings, reflections, and “aha” moments here.



Step 3. Define the changes

You have narrowed in on something you want to change; now, begin the process of defining the change and mapping out how you will make it happen. Start with your picture of success—this grounds your work in a vision of how you expect things to be different. As you plan, think both about who will change, what you will change, and how you will make the change happen.

How you might facilitate innovation

Building on Steps 1 and 2, Step 3 will also require you to explore several possibilities for designing the change, and then build consensus around a plan for change. Embrace the idea that defining and carrying out the change is likely to be an iterative process.



Explore possibilities. Start by bringing people together again—perhaps some or all of those who participated in Step 1 (reflect and assess)—to explore possibilities for defining the change you hope to see. The key is to think outside the box first, then get precise in defining what you will do, how you will do it, and how you will measure success. Consider changes to your organizational culture that are aspirational yet feasible. Also, include people who represent diverse perspectives. It will improve buy in and improve the quality of the change.



Build consensus. Your next step is to start prioritizing among the options. Consider using a human-centered design method such as “bullseye diagramming” or an “effort-to-impact matrix” to work through a prioritization exercise together. Keep it focused, aspirational yet realistic. See Appendix B for guidance on each of these activities.

Activity: Define the change, create a plan, and envision results

The Change

The Plan (what, how, who, when)

Anticipated Results (How will you know if you are successful?)

Step 4. Check your success: Reflect, learn, and refine

Measuring change takes time and intentionality, which can be difficult to come by in the busyness of day-to-day work. If you don't prioritize this step, however, you miss a key opportunity to learn from the successes and failures of your well-intentioned changes.

To check your success, ask how will you know if you have made a difference? Create a data collection plan for answering this question. After making the change, reflect on how it went by executing your data collection plan. In what ways did you accomplish what you set out to do?

In answering both questions, strive to include diverse perspectives and question your own assumptions about the answers. Doing so will help you better understand the effects of your change in building evidence capacity.



Activity: Reflect and course correct

How will you know if you made a difference? (Develop a data collection plan before rolling out your change)

What do you want to learn? (Learning objectives)

What is your plan for testing the change (who, what, where, when, how)?

How will you measure success?

How can you make this process more inclusive and culturally responsive?

Did you accomplish what you set out to do? (Summarize your findings after rolling out your change)

What worked well about your change?

What didn't work so well?

What did you learn?

Based on your results, what will you do?



Area 3: Evidence infrastructure

Evidence infrastructure, a key indicator of evidence capacity, is the tools, resources, routines, and processes that enable the use of evidence in an organization.



Objectives of each step


Steps 1 & 2. Reflect and assess, then narrow your focus (Learn phase)	Step 3. Define the changes (Innovate phase)	Step 4. Check your success: reflect, learn, and refine (Improve phase)
<ul style="list-style-type: none">/ Explore how your organization has built an evidence infrastructure./ Identify the strengths and potential gaps in your organization's evidence infrastructure./ Unpack your organization's readiness to improve the evidence infrastructure.	<ul style="list-style-type: none">/ Identify potential changes leaders and staff might be willing to make to strengthen your organization's evidence infrastructure./ Construct a plan for making these changes./ Consider how your organization might benefit from these changes.	<ul style="list-style-type: none">/ Implement the change./ Gather data on your progress; reflect; then make any necessary changes to your approach. Continue to monitor progress, reflect, and refine, as needed./ Consider additional changes you might make in other areas (return to the Learn phase).

Step 1. Reflect and assess

Begin learning by collaboratively reflecting on and assessing how your current evidence infrastructure allows your organization to use and build evidence. The table that follows suggests several different ways to reflect on evidence infrastructure such as your data infrastructure and the tools and processes you use to document, evaluate, and continuously improve your program. The table includes reflection questions with bolded text to flag the concepts identified in our scan of existing research on approaches for building evidence capacity. It also includes good practices or indicators for building evidence capacities in the area of evidence infrastructure, and examples that represent practice experience and wisdom from the field.

As you work through this activity, consider several different methods for data collection such as team discussions, structured surveys, human-centered design activities—or some combination (see Appendix A). Where possible, seek feedback from program leaders, direct service staff, community partners, and, when appropriate, program participants. Including diverse perspectives will shed light on challenges the team may not have considered. Step 1 might take a few sessions during a single week or it could take multiple sessions over several months—depending on the questions you want to answer and the methods you use to answer them to assess your evidence capacity in this area.

Activity: Reflect on and assess evidence infrastructure

 Capture your findings, reflections, and “aha” moments here.

Reflection question	Descriptions of good practice	Examples from the field
<p>What resources and tools do you have available to guide the use of evidence?</p> <p>/ Do you have a clearly defined logic model?</p> <p>/ Do you have the infrastructure and practices in place to assess your organization’s readiness to conduct evaluation?</p> <p>/ Do you have a process for regularly updating a learning agenda for continuous improvement?</p>	<p>/ The organization has and uses a set of resources to systematically guide and enable its use of evidence and assess strengths, shortcomings, and opportunities. Examples of tools include learning agendas, logic models, and needs or capacity assessments.</p>	<p>/ Annually establish a learning agenda for the fiscal year that the organization uses to establish research goals, guide routine data analysis, and iteratively improve programming.</p> <p>/ Create a logic model (road map for change) for each program/initiative in your agency and revisit it every six months to document updates or changes based on what the team is learning.</p>
<p>What data infrastructure and technology do you have available to collect, store, and analyze data on an ongoing basis?</p> <p>/ How easy is it to collect new data to evaluate a program change?</p> <p>/ Do you have useful tools to access and analyze both existing data and new data collection?</p> <p>/ How well does your current technology generate the information you need to inform timely decision making?</p>	<p>/ The organization has the technical infrastructure (hardware and software) and defined processes necessary to collect, store, analyze, access, share, and manage data securely.</p> <p>/ Sources of data are high quality and easily accessible.</p> <p>/ The organization attempts to link one or more internal or external data sources.</p> <p>/ The organization continually invests in new technology, such as automation, to create more efficient processes for data management.</p>	<p>/ Volunteer to pilot test new technology and/or programming that can quickly generate real-time performance reports.</p> <p>/ Ask data analysts to draft procedures and security protocols for using data to inform decisions.</p>
<p>Are you able to use data for timely performance monitoring and improvement to regularly reflect on the performance of leaders, staff, and/or participants? What are some examples?</p> <p>/ What process do you use to develop and implement new strategies?</p>	<p>/ The organization analyzes metrics routinely to track progress against performance goals that have been communicated to staff.</p> <p>/ The organization uses a systematic process to identify challenges, develop and implement strategies to address those challenges, and collect and analyze data to determine whether strategies had intended effects.</p>	<p>/ Hold a contest for program managers, using a data dashboard report to track team performance. Identify which factors improved performance and which factors contributed to lower performance.</p> <p>/ Use LI² or another evidence-informed or evidence-based model to regularly improve program quality.</p>
<p>/ What tools and processes do you have in place for program evaluation?</p> <p>/ How do you know which service components appear to be making a difference in improving your implementation (quality and consistency of program services) and/or program outcomes?</p>	<p>/ The organization conducts systematic studies to identify ways to focus its programs and services (foundational fact-finding) and assess how well a program is working (evaluation).</p> <p>/ Evaluations include process and implementation evaluations, outcome evaluations, and impact evaluations.</p> <p>/ As needed, the organization expands its capacity by procuring external research and evaluation expertise.</p>	<p>/ Volunteer to participate in a federal evaluation or research study.</p> <p>/ Conduct a rapid-cycle evaluation of one or more core program components.</p>

Step 2. Narrow your focus

Based on your assessment in Step 1, it’s time to create some consensus and cohesion about the priority takeaways and next steps. This process can be quick. See Appendix B for examples of how your implementation team could use a human-centered design activity or other prioritization activities to narrow your focus. These activities provide a process for reaching agreement about potential change(s) you could implement to strengthen the role that evidence plays in your organizational culture.



Activity: Reflect and identify potential actions

- / Where are you most motivated and able to make a change in your organizational culture that would build your capacity to use and build evidence?

- / Who are the key partners that should help design and execute the change(s)?
- / What roles might they play?

- / What is your readiness for change—individually and as an organization? Why?
- / What factors might help or hinder your success—for example, level of motivation, bandwidth, availability of resources, level of influence or power?



Capture your findings, reflections, and “aha” moments here.



Step 3. Define the changes

You have narrowed in on something you want to change; now, begin the process of defining the change and mapping out how you will make it happen. Start with your picture of success—this grounds your work in a vision of how you expect things to be different. As you plan, think both about who will change, what you will change, and how you will make the change happen.

How you might facilitate innovation

Building on Steps 1 and 2, Step 3 will also require you to explore several possibilities for designing the change, and then build consensus around the exact plan for change. Embrace the idea that defining and carrying out the change is likely to be an iterative process.



Explore possibilities. Start by bringing people together again—perhaps some or all of those who participated in Step 1 (reflect and assess)—to explore possibilities for defining the change you hope to see. The key is to think outside the box first, then get precise in defining what you will do, how you will do it, and how you will measure success. Consider changes to your evidence infrastructure that are aspirational, yet feasible. Also, include people who represent diverse perspectives. It will improve buy in and improve the quality of the change.



Build consensus. Your next step is to start prioritizing the options. Consider using a human-centered design method such as “bullseye diagramming” or an “effort-to-impact matrix” to work through a prioritization exercise together. Keep it focused, aspirational yet realistic. See Appendix B for guidance on each of these activities.

Activity: Define the change, create a plan, and envision results

The Change

The Plan (what, how, who, when)

Anticipated Results (How will you know if you are successful?)

Step 4. Check your success: Reflect, learn, and refine

Measuring change takes time and intentionality, which can be difficult to come by in the busyness of day-to-day work. If you don't prioritize this step, you miss a key opportunity to learn from the successes and failures of your well-intentioned changes.

To check your success, ask how will you know if you have made a difference? Create a data collection plan for answering this question. After making the change, reflect on how it went by executing your data collection plan. In what ways did you accomplish what you set out to do?

In answering both questions, strive to include diverse perspectives and question your own assumptions about the answers. Doing so will help you better understand the effects of your change in building evidence capacity.



Activity: Reflect and course correct

How will you know if you made a difference? (Develop a data collection plan before rolling out your change)

What do you want to learn? (Learning objectives)

What is your plan for testing the change (who, what, where, when, how)?

How will you measure success?

How can you make this process more inclusive and culturally responsive?

Did you accomplish what you set out to do? (Summarize your findings after rolling out your change)

What worked well about your change?

What didn't work so well?

What did you learn?

Based on your results, what will you do?



Area 4. Staff capabilities to create and use evidence

Staff capabilities to create and use evidence as a key area of evidence capacity are the knowledge, skills, and experience to understand the available data and use research within programs.



Objectives of each step

Steps 1 & 2. Reflect and assess, then narrow your focus (Learn phase)	Step 3. Define the changes (Innovate phase)	Step 4. Check your success: reflect, learn, and refine (Improve phase)
<ul style="list-style-type: none">/ Explore staff capabilities to create and use evidence./ Unpack your organization’s readiness for change—for leaders to invest in and staff willing to build their evidence capabilities.	<ul style="list-style-type: none">/ Identify potential changes leaders and staff are willing and able to make to build staff capabilities./ Construct a plan for making these changes./ Consider how your organization might benefit from these changes.	<ul style="list-style-type: none">/ Implement the change./ Gather data on your progress; reflect; then make any necessary changes to your approach. Continue to monitor progress, reflect, and refine, as needed./ Consider additional changes you might make in other areas (return to the Learn phase).

Step 1. Reflect and assess

Begin by collaboratively reflecting on and assessing how your organization strengthens and supports staff capabilities to use and build evidence. The table that follows offers several different ways to reflect on how leaders can invest in building the capabilities of staff (for example, by investing in their analytic skills and providing professional development opportunities such as attending conferences and trainings). The table includes reflection questions with bolded text to flag the concepts identified in our scan of existing research on approaches for building evidence capacity. It also includes good practices or indicators for building staff capacities, and examples that represent practice experience and wisdom from the field.

As you work through this activity, consider several different methods for data collection such as team discussions, structured surveys, human-centered design activities—or some combination (see Appendix A). Where possible, seek feedback from program leaders, direct service staff, community partners, and, when appropriate, program participants. Including diverse perspectives will shed light on challenges the team may not have considered. Step 1 might take a few sessions during a single week or it could take multiple sessions over several months—depending on the questions you want to answer and the methods you use to answer them to assess your evidence capacity in this area.

Activity: Reflect on and assess evidence infrastructure

Reflection question	Descriptions of good practice	Examples from the field
<ul style="list-style-type: none"> What evidence-building and analytic skills do staff have to plan and carry out evaluation activities that contribute to decision making? What skills may be missing? How does your organization include staff in developing a logic model, evaluation questions or plans, and data collection tools; and collecting credible, reliable data? Are the examples of how staff within the organization use data to test new ideas? 	<ul style="list-style-type: none"> Staff have the skills to carry out systematic activities using appropriate methods that contribute to evidence-based decision-making. They can develop logic models, research questions, evaluation plans, and instruments to collect credible, reliable data. Staff use primary and secondary data sources to explore theories and test ideas. 	<ul style="list-style-type: none"> Co-develop a logic model (or road map for change) and testing plan for a program evaluation or test of a select program component. Send specialized staff to a training on research and evaluation and/or human-centered design; use a train-the-trainer approach to build the analytic capabilities of other staff. Hold regular sessions with staff to review performance dashboards and set goals to improve results.
<ul style="list-style-type: none"> What communication skills do staff have to clearly and concisely communicate research findings? What does skilled communication look like? In what ways do these skills show up in practice? 	<ul style="list-style-type: none"> Staff have strong written and verbal communication skills that enable them to distill and communicate research findings effectively to internal and external audiences. They communicate clearly and concisely using plain language. 	<ul style="list-style-type: none"> Present research findings at state or national conferences. Present findings during staff meetings to obtain staff's reflections and recommendations for policy and practice.
<ul style="list-style-type: none"> To what extent do you deliver internal professional development activities and connect to external professional development opportunities relevant to your work? 	<ul style="list-style-type: none"> Staff engage in ongoing internal professional development activities (for example, brown bag sessions, trainings, communities of practice) and external development opportunities (for example, conferences) to build evaluation and communication skills. Professional development opportunities help staff skills stay current with leading evidence-building practices. 	<ul style="list-style-type: none"> Hold brown bag sessions and in-house seminars for staff. Allow staff to attend conferences and external trainings for professional development.



 Capture your findings, reflections, and “aha” moments here.

Step 2. Narrow your focus

Based on your assessment in Step 1, it's time to create some consensus and cohesion about the priority takeaways and next steps. The process can be quick. See Appendix B for examples of how your team could use a human-centered design activity or other prioritization activities to narrow your focus. These activities provide a process for reaching agreement about potential change(s) you could implement to build the capacity of staff and to incorporate evidence in their everyday work.



Activity: Reflect and identify potential actions

- / Where are you most motivated and able to make a change in your organizational culture that would build your capacity to use and build evidence?
- / Who are the key partners that should help design and execute the change(s)? What roles might they play?
- / What is your readiness for change—individually and as an organization? Why?
- / What factors might help or hinder your success—for example, level of motivation, bandwidth, availability of resources, level of influence or power?

 Capture your findings, reflections, and “aha” moments here.

A large, empty light blue rectangular area intended for capturing findings, reflections, and “aha” moments.



Step 3. Define the changes

You have narrowed in on something you want to change; now, begin the process of defining the change and mapping how you will make it happen. Start with your picture of success—this grounds your work in a vision of how you expect things to be different. As you plan, think both about who will change, what you will change, and how you will make the change happen.

How you might facilitate innovation

Building on Steps 1 and 2, Step 3 will also require you to explore several possibilities for designing the change, and then build consensus around a plan for change. Embrace the idea that defining and carrying out the change is likely to be an iterative process.



Explore possibilities. Start by bringing people together again—perhaps some or all of those who participated in Step 1 (reflect and assess)—to explore possibilities for defining the change you hope to see. The key is to think outside the box first, then get precise in defining what you will do, how you will do it, and how you will measure success. Consider changes to your investments in building staff capabilities that are aspirational yet feasible. Also, include people who represent diverse perspectives. It will improve buy in and improve the quality of the change.



Build consensus. Your next step is to start prioritizing the options. Consider using a human-centered design method such as “bullseye diagramming” or an “effort-to-impact matrix” to work through a prioritization exercise together. Keep it focused, aspirational yet realistic. See Appendix B for guidance on each of these activities.

Activity: Define the change, create a plan, and envision results

The Change

The Plan (what, how, who, when)

Anticipated Results (How will you know if you are successful?)

Step 4. Check your success: Reflect, learn, and refine

Measuring change takes time and intentionality, which can be difficult to come by in the busyness of day-to-day work. If you don't prioritize this step, you miss a key opportunity to learn from the successes and failures of your well-intentioned changes.

To check your success, ask how will you know if you have made a difference? Create a data collection plan for answering this question. After making the change, reflect on how it went by executing your data collection plan. In what ways did you accomplish what you set out to do?

In answering both questions, strive to include diverse perspectives and question your own assumptions about the answers. Doing so will help you better understand the effects of your change in building evidence capacity.



Activity: Reflect and course correct

How will you know if you made a difference? (Develop a data collection plan before rolling out your change)

What do you want to learn? (Learning objectives)

What is your plan for testing the change (who, what, where, when, how)?

How will you measure success?

How can you make this process more inclusive and culturally responsive?

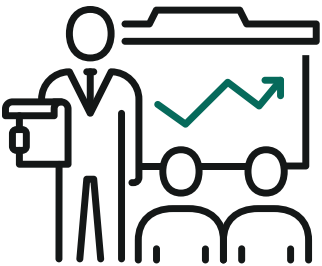
Did you accomplish what you set out to do? (Summarize your findings after rolling out your change)

What worked well about your change?

What didn't work so well?

What did you learn?

Based on your results, what will you do?



Area 5: Engagement and communication in creating and using evidence

Engagement and communication in creating and using evidence are the ways your organization collaborates with internal and external partners to inform them and seek their input in planning research activities and disseminating data and evidence. It also includes conveying information effectively to intended audiences using communication channels that best fit their needs.



Objectives of each step

Steps 1 & 2. Reflect and assess, then narrow your focus (Learn phase)	Step 3. Define the changes (Innovate phase)	Step 4. Check your success: reflect, learn, and refine (Improve phase)
<ul style="list-style-type: none">/ Explore how and for what purposes your organization collaborates with internal and external partners to plan research activities and disseminate data and evidence./ Assess in what ways staff select the right dissemination strategies to address the needs of the intended audiences./ Unpack your organization’s readiness for change to improve internal and/or external engagement and communication.	<ul style="list-style-type: none">/ Identify potential changes leaders and staff are willing and able to make to improve engagement and communication in creating and using evidence./ Construct a plan for making these changes./ Consider how your organization might benefit from these changes.	<ul style="list-style-type: none">/ Implement the change./ Gather data on your progress; reflect; then make any necessary changes to your approach. Continue to monitor progress, reflect, and refine, as needed./ Consider additional changes you might make in other areas (return to the Learn phase).

Step 1. Reflect and assess

Begin by collaboratively reflecting on and assessing your organization’s engagement and communication practices that allow you to use and build evidence. The table that follows suggests several different ways to reflect on how you engage partners, including your approach to collaboration, engagement, and dissemination of evaluation findings. The table includes reflection questions with bolded text to flag the concepts identified in our scan of existing research on approaches for building evidence capacity. It also includes good practices or indicators for strengthening engagement and communication strategies with internal and external partners, and examples that represent practice experience and wisdom from the field.

As you work through this activity, consider several different methods for data collection such as team discussions, structured surveys, human-centered design activities—or some combination (see Appendix A). Where possible, seek feedback from program leaders, direct service staff, community partners, and, when appropriate, program participants. Including diverse perspectives will shed light on challenges the team may not have considered. Step 1 might take a few sessions during a single week or it could take multiple sessions over several months—depending on the questions you want to answer and the methods you use to answer them to assess your evidence capacity in this area.

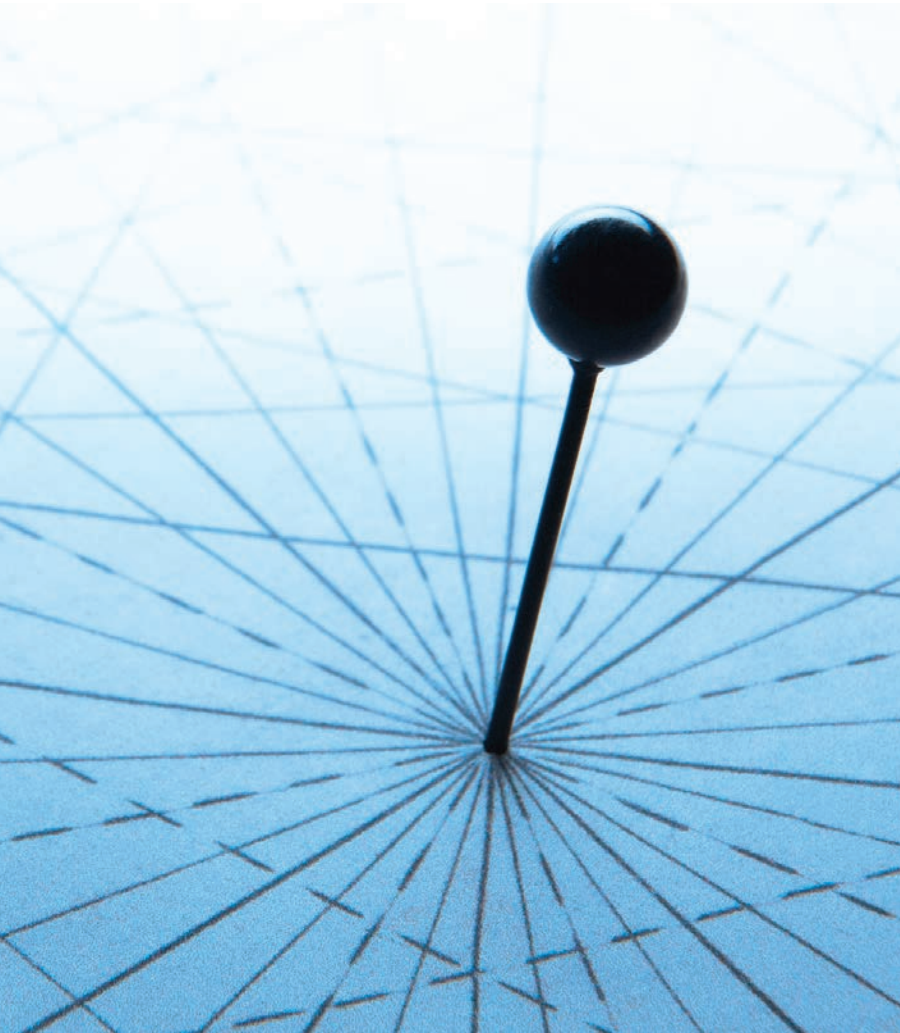
Activity: Reflect on and assess evidence infrastructure

Reflection question	Descriptions of good practice	Examples from the field
<div>/ How do you establish and foster internal engagement within and across your organization?</div>	<div>/ Staff share information bidirectionally and collaborate within and across departments, operating as a cohesive organization rather than in siloes.</div>	<div>/ Engage internal teams in a data-driven design challenge to improve program participation.</div> <div>/ Create a diverse team of staff at various levels to review organizational challenges, identify available and missing data, and propose research activities to explore them</div>
<div>/ How does your organization engage external partners such as program participants, contracted service providers, and other community organizations?</div> <div>/ What strategies does your organization use to engage, learn from, and work collaboratively with a diverse set of external partners?</div>	<div>/ Leaders and staff build relationships that enable bidirectional information-sharing, consultation, involvement, and collaboration with external audiences, such as program clients and their communities, partner organizations, and external researchers.</div>	<div>/ Organize an interagency collaboration to understand and tackle a challenging community problem (for example, high rates of teen pregnancy, low rates of high school or GED completion).</div> <div>/ Include program participants, contracted service providers, and other community organizations in activities such as identifying problems, planning, implementation, data collection, data analysis and making meaning of findings, and dissemination.</div>
<div>/ How do you distill and communicate what you have learned within and outside of your organization? What processes do you use for dissemination, including deciding who gets what information and in what form?</div>	<div>/ Staff can access and use the most effective formats (for example, technical reports, presentations, and briefs) and channels (for example, newsletters, webinars, conferences, and social media) for unidirectional communication with intended audiences.</div>	<div>/ Create a communication plan for internal and external partners for disseminating research findings.</div> <div>/ Hold space during monthly/quarterly staff meetings to share and discuss what has been learned from recent pilot testing or other research activities within the organization</div>

 Capture your findings, reflections, and “aha” moments here.

Step 2. Narrow your focus

Based on your assessment in Step 1, it’s time to create some consensus and cohesion about the priority takeaways and next steps. This process can be quick. See Appendix B for examples of how your team could use a human-centered design activity or other prioritization activities to narrow your focus. These activities provide a process for reaching agreement about potential change(s) you could implement to improve engagement and communication about evidence in your organization.



Activity: Reflect and identify potential actions

- / Where are you most motivated and able to make a change in your engagement and communication practices that would build your capacity to use and build evidence?
- / Who are the key partners that should help design and execute the change(s)? What roles might they play?
- / What is your readiness for change—individually and as an organization? Why?
- / What factors might help or hinder your success—for example, level of motivation, bandwidth, availability of resources, level of influence or power?



Capture your findings, reflections, and “aha” moments here.

A large, empty rectangular area with a light teal background, intended for users to capture their findings, reflections, and “aha” moments.



Step 3. Define the changes

You have narrowed in on something you want to change; now, begin the process of defining the change and mapping out how you will make it happen. Start with your picture of success—this grounds your work in a vision of how you expect things to be different. As you plan, think both about who will change, what you will change, and how you will make the change happen.

How you might facilitate innovation

Building on Steps 1 and 2, Step 3 will also require you to explore several possibilities for designing the change, and then build consensus around a plan for change. Embrace the idea that defining and carrying out the change is likely to be an iterative process.



Explore possibilities. Start by bringing people together again—perhaps some or all of those who participated in Step 1 (reflect and assess)—to explore possibilities for defining the change you hope to see. The key is to think outside the box first, then get precise in defining what you will do, how you will do it, and how you will measure success. Consider changes to your engagement and communication practices that are aspirational yet feasible. Also, include people who represent diverse perspectives. It will improve buy in and improve the quality of the change.



Build consensus. Your next step is to start prioritizing among the options. Consider using a human-centered design method such as “bullseye diagramming” or an “effort-to-impact matrix” to work through a prioritization exercise together. Keep it focused, aspirational yet realistic. See Appendix B for guidance on each of these activities.

Activity: Define the change, create a plan, and envision results

The Change

The Plan (what, how, who, when)

Anticipated Results (How will you know if you are successful?)

Step 4. Check your success: Reflect, learn, and refine

Measuring change takes time and intentionality, which can be difficult to come by in the busyness of day-to-day work. If you don't prioritize this step, you miss a key opportunity to learn from the successes and failures of your well-intentioned changes.

To check your success, ask how will you know if you have made a difference? Create a data collection plan for answering this question. After making the change, reflect on how it went by executing your data collection plan. In what ways did you accomplish what you set out to do?

In answering both questions, strive to include diverse perspectives and question your own assumptions about the answers. Doing so will help you better understand the effects of your change in building evidence capacity.



Activity: Reflect and course correct

How will you know if you made a difference? (Develop a data collection plan before rolling out your change)

What do you want to learn? (Learning objectives)

What is your plan for testing the change (who, what, where, when, how)?

How will you measure success?

How can you make this process more inclusive and culturally responsive?

Did you accomplish what you set out to do? (Summarize your findings after rolling out your change)

What worked well about your change?

What didn't work so well?

What did you learn?

Based on your results, what will you do?

Appendix A. Menu of learning activities

Activity/method	Description
Co-creative engagements	
Human-centered design sessions	Human-centered design is a framework and set of activities for engaging people in co-designing solutions to problems from the user’s perspective—for example, developing a new program orientation or intake assessment with an emphasis on the participant’s experience. Common activities include: Rose, Thorn, Bud; What’s on your Radar?; and Problem Tree Analysis
Strategic planning	Strategic planning sessions are used to define the strategy and direction of the work. Initially, these sessions typically serve as a way for everyone involved to agree upon the direction. Periodically during the Innovate and Improve phases, these sessions serve to keep the work on track.
Qualitative methods	
Interviews (group and individual)	These involve individual and small group interviews with key stakeholders (typically two or three people per interview). Interviewers use a standardized list of questions to gain insight on the environment and perceptions of existing problems.
Focus groups	Focus groups typically include six to eight stakeholders and are structured to spark exchanges between group members. Facilitators help generate ideas and insights around a key set of topics.
Observations	These typically take place in person, with observers sitting in on activities conducted within a program or across agencies (for example, orientations, intake, coaching sessions, staff meetings, community partner meetings). Observations can help build understanding of the problem or context.
Review of existing materials	Organizational charts, policies and procedures, outcome reports, and other documents may shed light on the environment or existing program challenges.
Mapping exercises	
Process maps	Process maps are used to identify the people and processes participants encounter as they move through a program. This activity can help unpack potential gaps or bottlenecks in service delivery.
Stakeholder or ecosystem maps	This tool is used to identify all the people who are involved in a system, program, or service component, as opposed to the processes. It can also be used to gather feedback on stakeholder experience—either directly from the stakeholder or how others perceive their experience.
Resource maps	For programs that are interested in service coordination or integration, resource maps can identify gaps and duplication in existing resources or activities.
Descriptive assessments and analysis	
Organizational assessments	Programs might use structured tools to assess their capabilities and readiness for change. They might also use assessments to identify targeted areas for improvement.
Surveys	Systematic data collection using electronic tools (for example, Google Forms, SurveyMonkey) or paper instruments is a way to collect feedback from key stakeholders and can help organizations identify problems or assess the environment. Surveys are typically self-administered.
Analysis of existing data	Readily available administrative or other program data can be used to better understand a problem or to assess the environment.

Appendix B: Select Human-Centered Design Activities

This appendix offers basic instructions for completing the “bullseye diagramming” and “impact-to-effort matrix” activities mentioned in the guides. This is not an exhaustive set of instructions and various approaches exist for facilitating these activities. We strongly encourage you to explore other resources on human-centered design activities—for example, from [LUMA Institute](#) or [IDEO](#).

Bullseye Diagramming (15 minutes)

Purpose: This activity helps build consensus among group members about the priorities of the innovation.

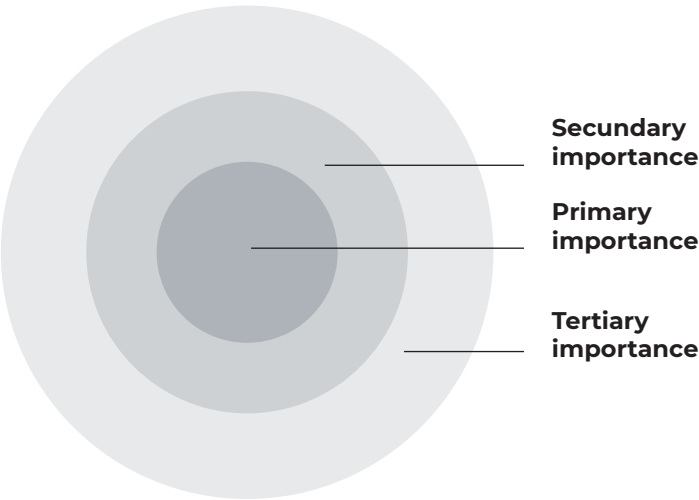
Materials and preparation: Poster paper. Draw a large bullseye with three concentric circles on the poster paper. Label the innermost circle “first choice” (or “primary”), followed by “second choice” (or “secondary”), and “third choice” (or “tertiary”).

Tips for Bullseye Diagram

- / Encourage debate
- / Set limits on the number of ideas per ring
- / Save un-used ideas in a “parking lot” for further discussion

Activity:

Each person will select their top two ideas from a prior brainstorming or reflection exercise (from which there are several competing possibilities). These ideas can be existing ideas or new insights that emerged from the clustering of ideas in the previous activity. Now plot the ideas on the bullseye by placing the idea your group likes the most in the center, two ideas that the group likes next best in the second ring, and the four ideas the group likes next best in the third ring. Debate the relative priorities within your team. You will have 5-10 minutes for this activity.



Ways to facilitate activity virtually:

- / **Telephone or video conference:** Ask participants the priority level of each idea. Participants can either respond verbally or submit their answer in the chat-box.
- / **Live polling:** Ask participants to submit their anonymous votes on each idea. The one with the most votes becomes the top priority.
- / **Virtual whiteboard:** Set up a board to mimic the bullseye above and facilitate discussion to help identify top priorities. Alternatively, participants could engage in visualize the vote (typically done by placing an icon on the top one or two ideas) or use the built-in voting feature (if available) to identify the top priorities.

Impact-to-Effort Matrix (15 minutes)

Purpose: This is a helpful exercise for prioritizing strategies.

Materials: Each group will need a new sheet of poster paper with a horizontal line drawn across the bottom of the page.

Tips for Impact to Effort Matrix

- / Be thoughtful about the level of effort required for each solution
- / Place the ideas along the X-axis first and then move ideas up and down the Y-axis
- / Save time for discussion, debate, and consensus building!

Activity:

Please take the sticky notes (2 per person) representing your favorite ideas from a list of possible solutions and arrange them side by side in order of potential impact. The idea that would have the least impact should be on the far-left hand side of the page; the idea with the greatest impact should be on the far-right hand side. Each of the ideas should be placed next to each other along the same line.

After 5 minutes...
Now, draw a line vertically on the far left hand side of the paper, creating a Y axis on the page. Please move the sticky notes vertically along the Y axis based on the level of effort it would take to carry out that idea. The bottom of the Y axis would be minimal effort, with the top of the axis representing a high level of effort. No two sticky notes should be on the same horizontal or vertical plane.

After another 5 minutes...
Now that all the ideas are on the paper, we will walk around the room and fill in the X and Y axes with a two by two grid that sorts the ideas into four categories: Luxury, Can Do, Strategic, and Quick Wins (see Table 2 below for example). Then we will give you time to review your matrices and discuss among yourselves. (5 minutes)

Impact to Effort Matrix

Effort	Luxury	Strategic
	“Can do”	Quick wins
Impact		

Ways to facilitate activity virtually:

- / **Telephone or video conference:** Ask participants to verbally discuss where they think an idea should fall along the X and Y-axes. Alternatively, participants could use the chat-box, if available, to indicate whether they think something is a “can do,” luxury, quick win, or strategic.
- / **Live polling:** Set up one idea per poll with the response options of “can do,” luxury, quick win, and strategic. Ask participants to submit their anonymous votes for each idea. Alternatively, ask participants to rate each idea on a scale of 1-10 for both effort and impact and place the idea in the matrix accordingly.
- / **Virtual whiteboard:** Set up a board to mimic the matrix above. Ask participants to first place the ideas in order of impact along the X-axis, and then in order of effort on the Y-axis.



Mathematica®
Progress Together

mathematica.org



Mathematica, Progress Together,
and the “circle M” logo are registered
trademarks of Mathematica Inc.

OPRE

