Are We There Yet? Applying Rapid Cycle Learning Methods to Evaluation within a Foundation's Program Design

October 29, 2016

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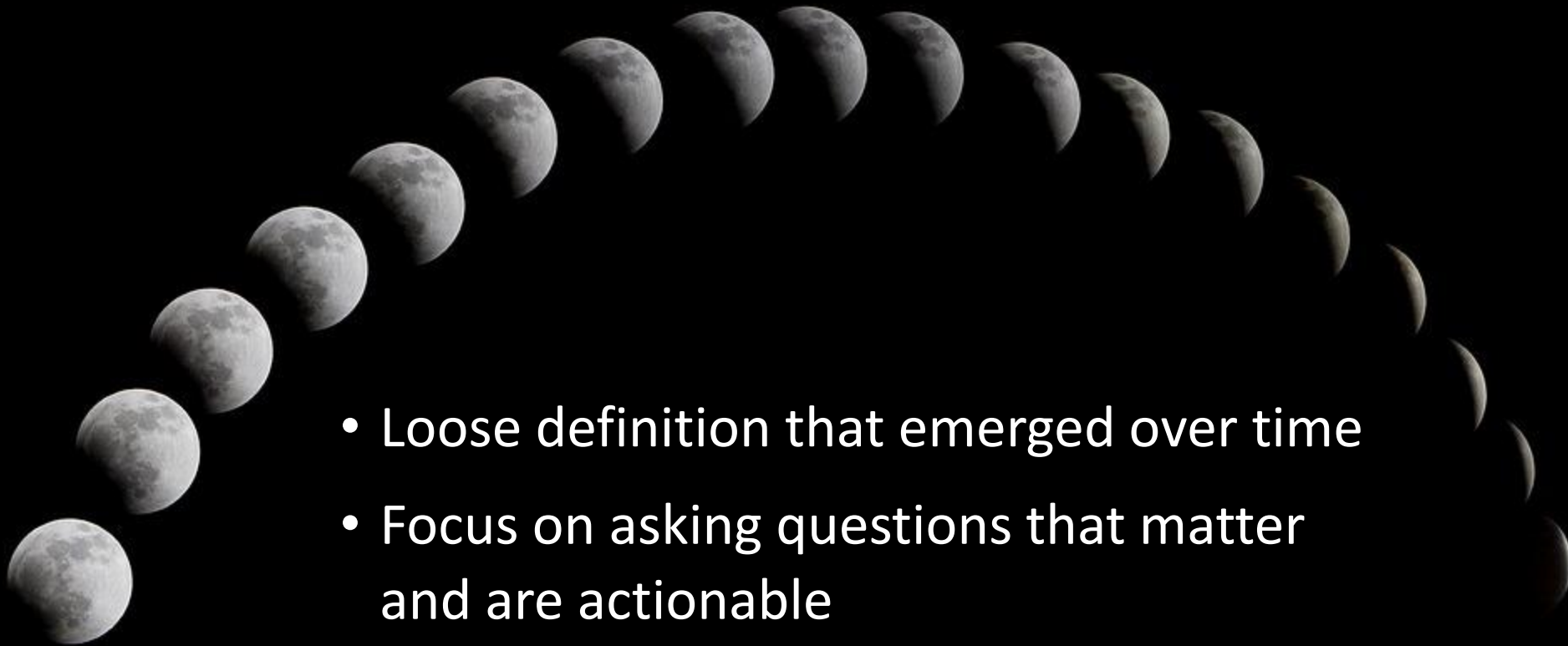
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Rapid Cycle Learning

- Loose definition that emerged over time

- Focus on asking questions that matter and are actionable

- Shorten evaluative feedback loop

- More mindset than method

Change Leadership Programs

Denise E. Herrera, PhD, MCHES

Program Officer

Context Matters: Organizational Shifts

1972 – 2014: "improve health and health care"

2013 – 2014: RWJF strategic planning

2014: "build a national Culture of Health" AND a shift in

    fellows/scholars programs

2016: adoption of Emergent Strategy AND shift to 4 themes

What's Different / What's the Same?

Traditional Programs

- Place based

- Individuals

- Stipend

- Mentoring

- Evaluated at end of program experience

New Programs

- National, not place based

- Individuals, interdisciplinary teams, cohorts

- Stipend

- Mentoring / Coaching

- Web-based and in person

- Core curriculum across all 4
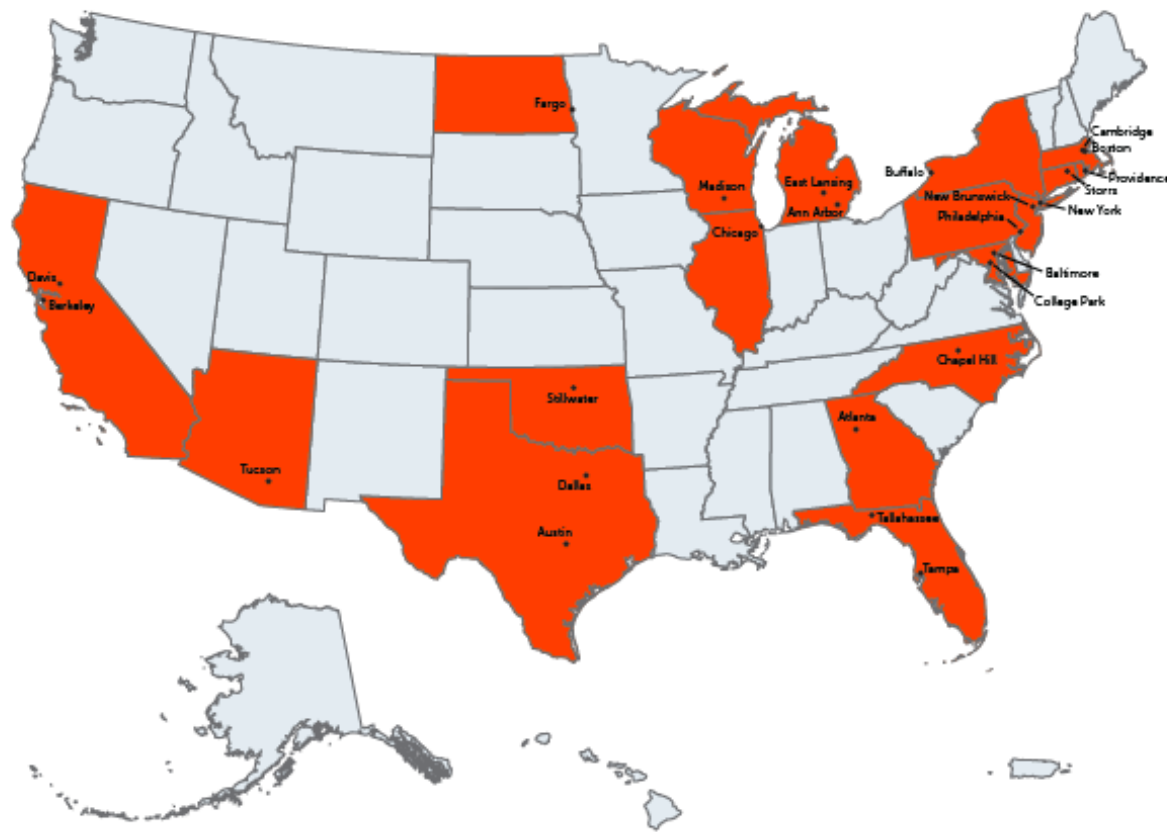
- Alumni engagement

Change Leadership Programs

- **Health Policy Research Scholars**

- **Interdisciplinary Research Leaders**

- **Culture of Health Leaders**

- **Clinical Scholars**

2016 Health Policy Research Scholars – 1ˢᵗ and 2ⁿᵈ Year PhD Students

2016 Interdisciplinary Research Leaders
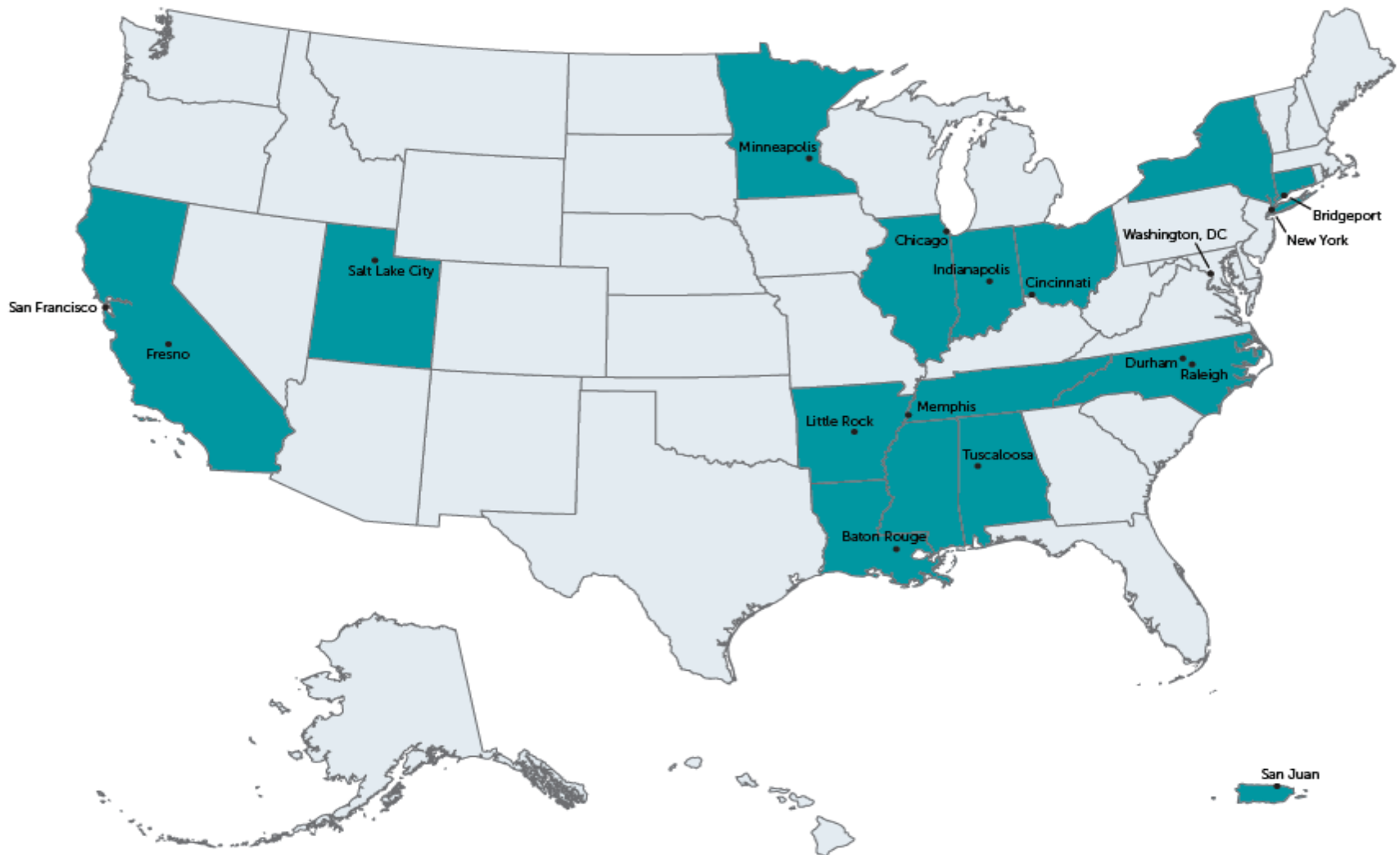
2016 Culture of Health Leaders
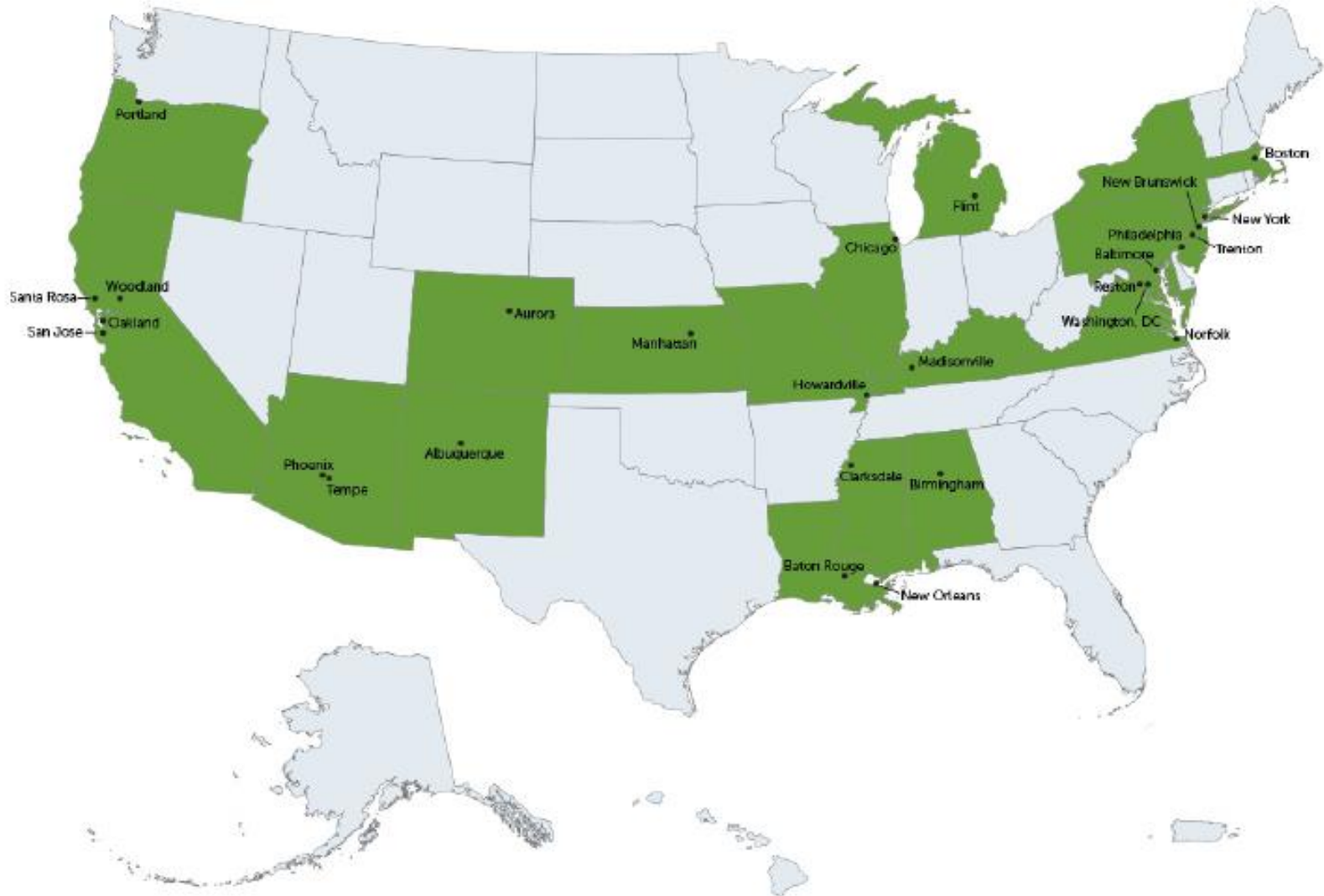
Clinical Scholars
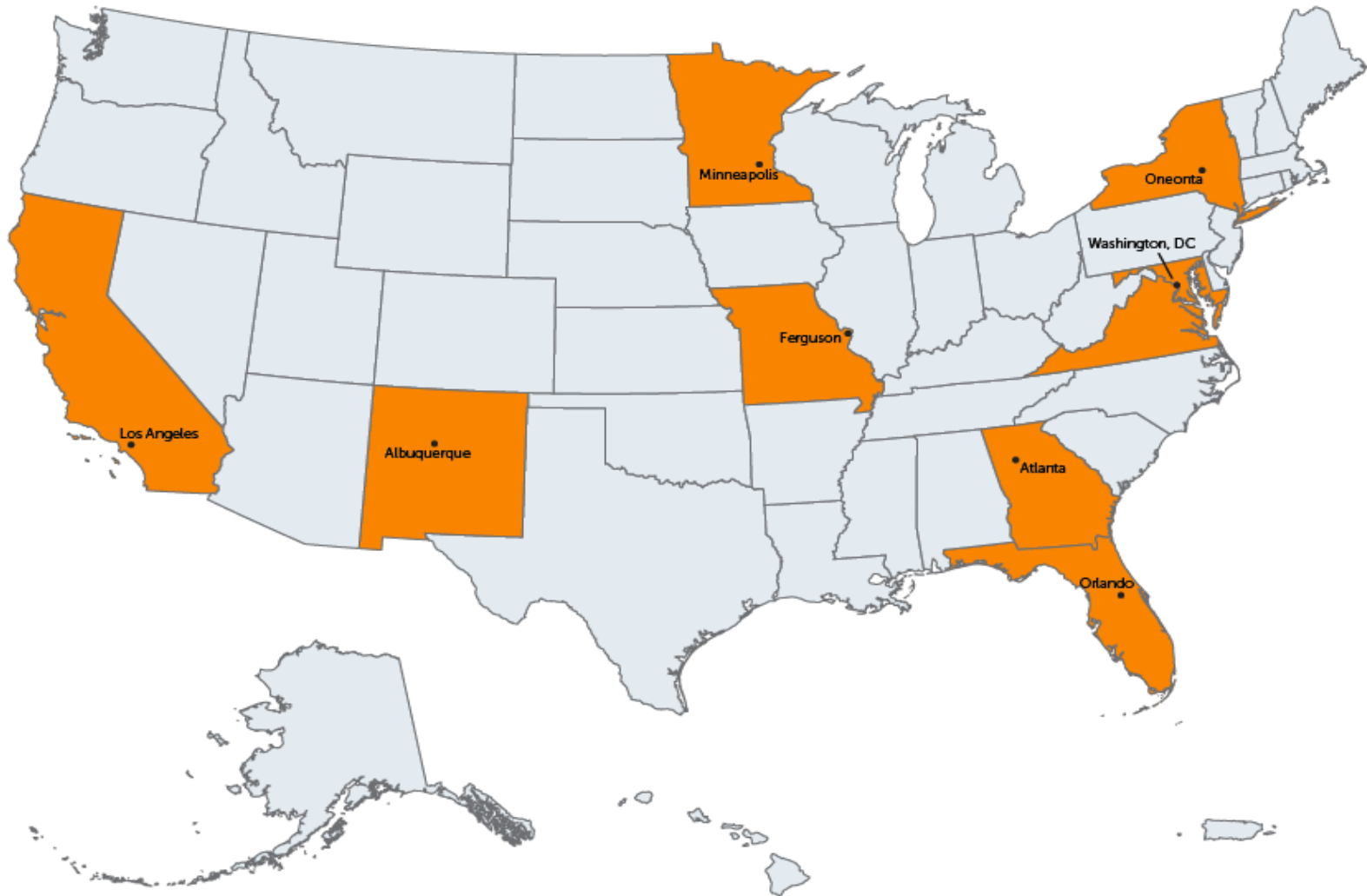
Key Players: RWJF Change Leaders Initiative

- Health Policy Research Scholars
- Interdisciplinary Research Leaders
- National Advisory Committee
- National Advisory Committee
- RWJF Coordinating Center & RWJF Staff
- Culture of Health Leaders
- Clinical Scholars
- National Advisory Committee
- National Advisory Committee
- Communications Firm - - - External Evaluation
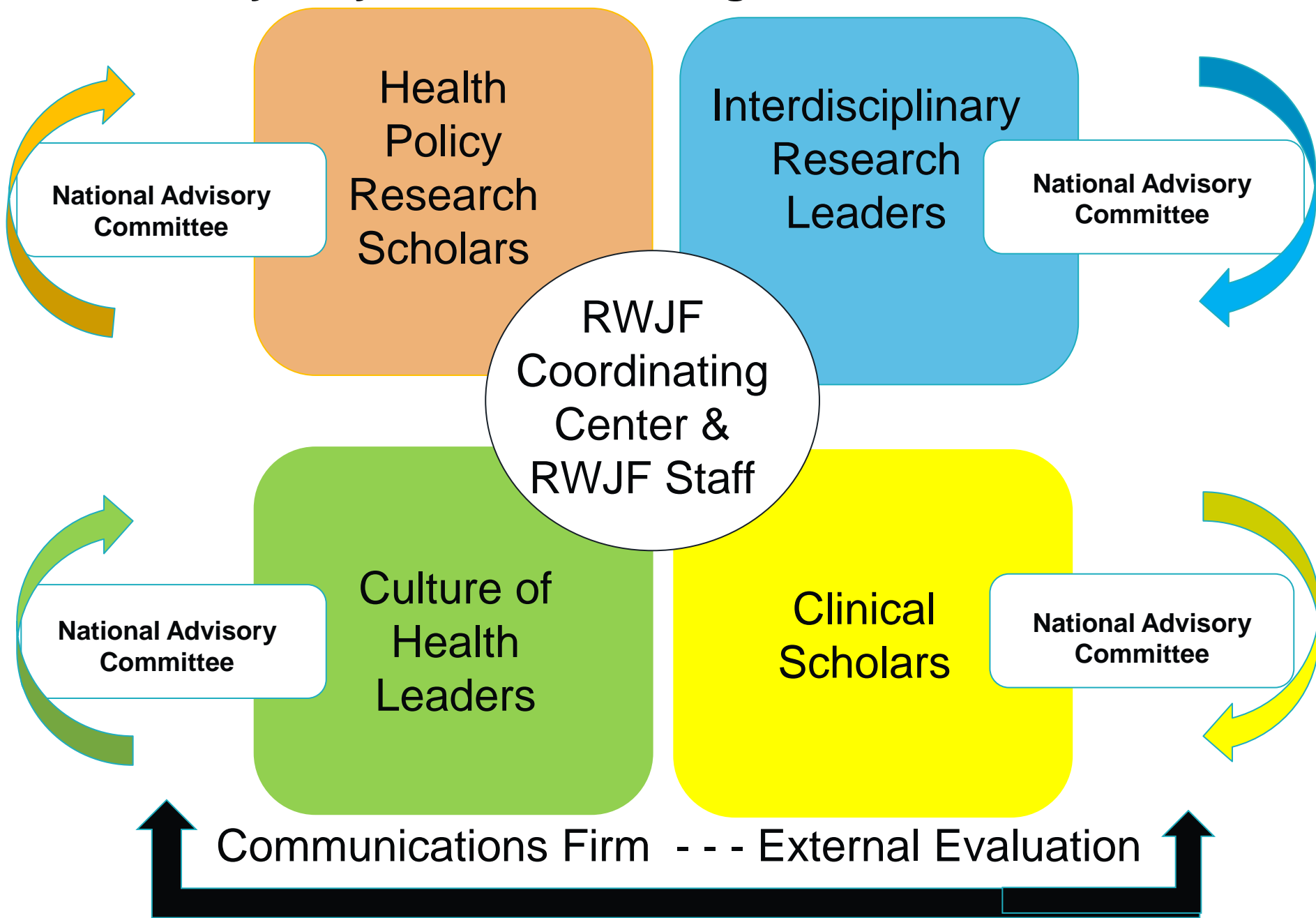
Re-Cap

- **National programs (not place based)**

- **Intra- and Inter- program collaboration**

- **Co-creation**

- **Shared decision-making**

- **Ongoing feedback and reflection**

- **Using a <u>compass</u>, not a roadmap**

Applying Rapid Cycle Learning Tools to a Foundation's Developmental Evaluation

Developmental Evaluation

tcc group

Context:

Large number of interacting and interdependent elements, no central control

Patterns of change emerge from rapid, real- time interactions

New programs

Goals are emergent

Purpose is learning, innovation, and change

Evaluation Implications:

Supportive of development of innovation and adaptation

Rapid, real-time feedback

User-friendly forms of feedback

Staying in touch with what's unfolding and responding accordingly

Teamwork and people skills

Source: Patton (1994, 2006)

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Planning for RCL

Developing the Program Theory

DRAFT Conceptual Framework: RWJF Change Leadership Programs

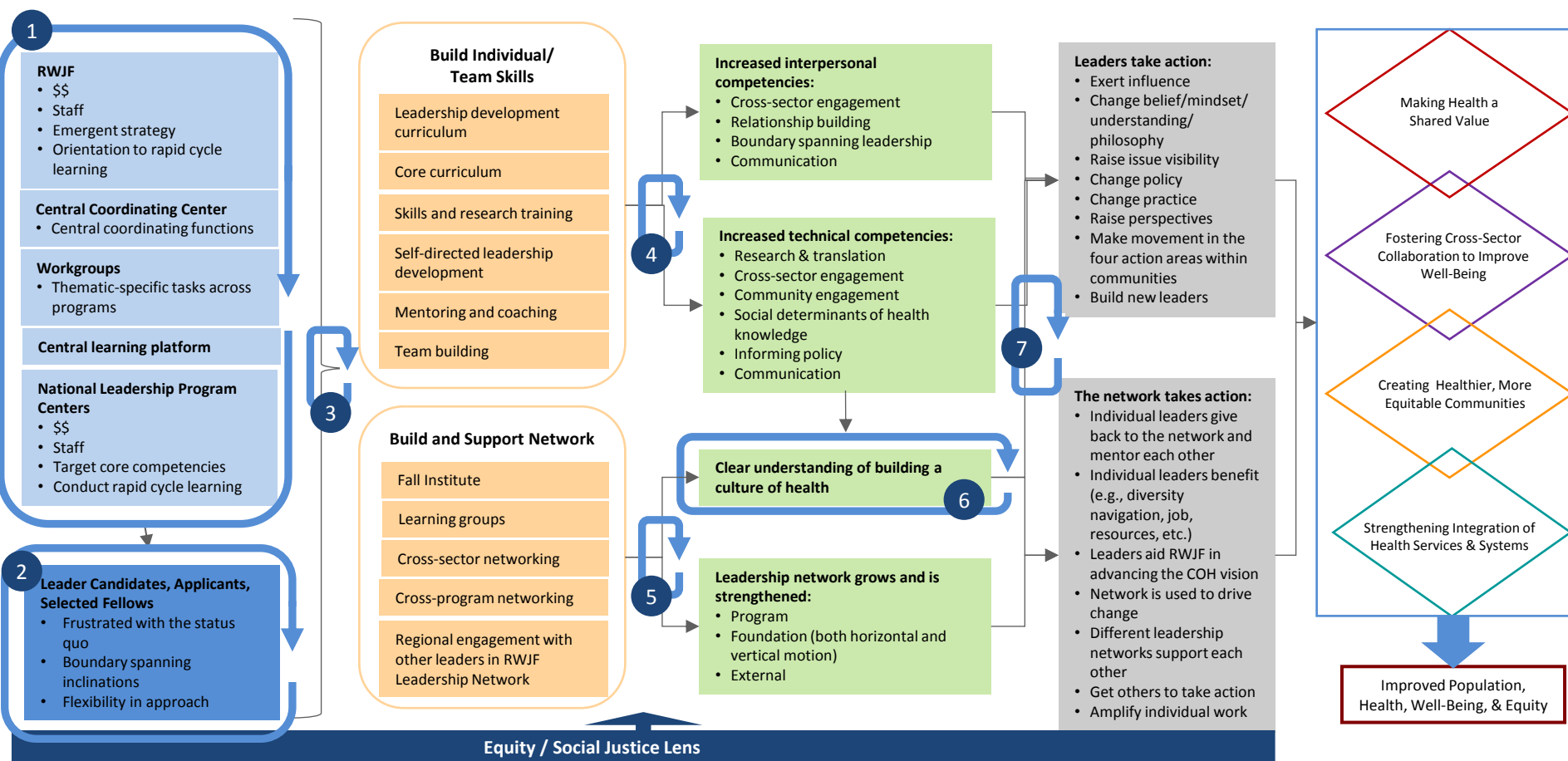⟳ = On-going Rapid Cycle Learning (RCL) Opportunity

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INPUTS	ACTIVITIES	SHORT-TERM OUTCOMES	LONG TERM OUTCOMES	IMPACT

(1)

RWJF
- $$
- Staff
- Emergent strategy
- Orientation to rapid cycle learning

Central Coordinating Center
- Central coordinating functions

Workgroups
- Thematic-specific tasks across programs

Central learning platform

National Leadership Program Centers
- $$
- Staff
- Target core competencies
- Conduct rapid cycle learning

(2)

Leader Candidates, Applicants, Selected Fellows
- Frustrated with the status quo
- Boundary spanning inclinations
- Flexibility in approach

(3)

Build Individual/ Team Skills

- Leadership development curriculum
- Core curriculum
- Skills and research training
- Self-directed leadership development
- Mentoring and coaching
- Team building

(4)

Build and Support Network

- Fall Institute
- Learning groups
- Cross-sector networking
- Cross-program networking
- Regional engagement with other leaders in RWJF Leadership Network

(5)

Increased interpersonal competencies:
- Cross-sector engagement
- Relationship building
- Boundary spanning leadership
- Communication

Increased technical competencies:
- Research & translation
- Cross-sector engagement
- Community engagement
- Social determinants of health knowledge
- Informing policy
- Communication

Clear understanding of building a culture of health

(6)

Leadership network grows and is strengthened:
- Program
- Foundation (both horizontal and vertical motion)
- External

(7)

Leaders take action:
- Exert influence
- Change belief/mindset/ understanding/ philosophy
- Raise issue visibility
- Change policy
- Change practice
- Raise perspectives
- Make movement in the four action areas within communities
- Build new leaders

The network takes action:
- Individual leaders give back to the network and mentor each other
- Individual leaders benefit (e.g., diversity navigation, job, resources, etc.)
- Leaders aid RWJF in advancing the COH vision
- Network is used to drive change
- Different leadership networks support each other
- Get others to take action
- Amplify individual work

Making Health a Shared Value

Fostering Cross-Sector Collaboration to Improve Well-Being

Creating Healthier, More Equitable Communities

Strengthening Integration of Health Services & Systems

Improved Population, Health, Well-Being, & Equity

Equity / Social Justice Lens

Aligning Rapid Cycle Learning Questions

RWJF Change Leadership Programs – Rapid Cycle Learning Questions – Example Page

1 **Rapid cycle learning culture and partnership questions**

- a. Are RWJF and the Coordinating Center asking rapid cycle learning (RCL) questions?
- b. Is there a process in place for making specific decisions related to RCL data?
- c. Are RWJF and Coordinating Center staff sufficient and appropriate for the work at hand?
- d. What is the quality of the relationship(s) among RWJF, the Coordinating Center, and the National Leadership Program Centers?
- e. To what extent has the program identified target "core competencies"?

2 **Leader candidates**

- a. What kind of leadership candidates is the program attracting? Are we reaching non-traditional groups?
- b. What is motivating candidates to participate in the program?
- c. What is the level of existing leadership capacity that candidates are coming in with?
- d. To what extent are candidates arriving with pre-existing project ideas?

Program quality and fit

3
- a. What parts of the program do participants most/least value?
- b. What is the perceived quality of specific activities?
- c. How effective is the mentoring relationship? What type of mentors is the program able to attract?
- d. Do participants feel a sense of ownership of their experience?
- e. Do participants feel like they are part of something bigger than themselves?
- f. To what extent are participants identifying meaningful project ideas?
- g. To what extent are participants engaging other participants or support networks in their project ideas?

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Mapping Rapid Cycle Learning Points

RWJF Change Leadership Initiative - Rapid Cycle Learning Priorities

8/25/16 version

Program Design | Program Planning Period | Year 1 of Program Implementation | Year 2 of Program Implementation

Nov 2015 | Feb 2016 | July 2016 | Sept 2016 | Feb 2017 | Sept 2017

NLPCs Onboarded

? • Is RWJF implementing a RCL culture?
• How does RWJF approach co-creation?

Change Leadership Programs Launch

? • Is RWJF implementing a RCL culture?
• How is RWJF approaching partnership with NLPCs?

Candidates Selected

? • What types of leader candidates are the programs attracting and not attracting?
• Are the partnerships between RWJF, Coordinating Center, and NLPCs effective?
• Is RWJF implementing a RCL culture?

Fall Institute

? • What is the quality of the programs?
• Are NLPCs and RWJF implementing a RCL culture?
• Are the partnerships between RWJF, Coordinating Center, and NLPCs effective?
• Are activities leading to competencies?
• To what extent is a network emerging?
• Is a CoH framework being used?
• Are there nascent stories of action?
• What barriers need to be addressed?

Optional program specific questions:
• How effective is the mentoring relationship?
• What type of mentors is the program able to attract?
• How effective are the learning webinars?
• Etc.

Fall Institute

? • What is the quality of the programs?
• Are NLPCs and RWJF implementing a RCL culture?
• Are the partnerships between RWJF, Coordinating Center, and NLPCs effective?
• Are activities leading to competencies?
• To what extent is the network being used?
• Is a CoH framework being used?
• Are there stories of action?
• What barriers need to be addressed?

KEY:
⭐ Significant program event
? Rapid Cycle Learning questions (see following slides for more detail)
🔶 After Action Review (AAR) conducted/planned
✦ Before Action Review (BAR) conducted
🔶 Formative evaluation point planned

Results shared with:	AAR of Program Design Phase	AAR of NLPC Launch	AAR of Program Planning Period	BAR of Fall Institute	AAR of Coordinating Center & Workgroups	AAR of Fall Institute	Formative Evaluation Point	AAR of Year 1
	Conducted	Conducted	In process	Conducted	In process	Planned	Planned	Planned
Denise Herrera	●	●	●	●	●		●	●
NLPCs		●	●			●	●	●
LBH team	●	●	●		●	●	●	●
RWJF leadership	●	●	●			●	●	●
RWJF Coordinating Center		●	●	●	●	●		●
Fall Institute workgroup				●	●			
Workgroups (as relevant)					●	●		●
Chatter				●				

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Implementing RCL

After Action Review

- Origins: U.S. Army, private sector

- Purpose: Extract lessons from one event or project and apply them to others

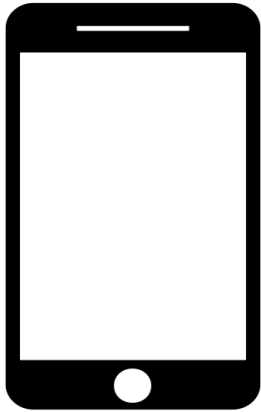- When used: Multiple points throughout Change Leadership planning and implementation phases

4. How can we improve next time?

3. What caused what happened?

After Action Review

1. What was supposed to happen?

2. What actually happened?

Before Action Review (Premortem)

- Origins: Private sector; Gary Klein, Harvard Business Review, Sept. 2007

- Purpose: Generate plausible reasons for a project's failure in order to plan against that failure

Imagine failure	→	Discuss likely reasons for failure	→	Plan to mitigate; develop success indicators
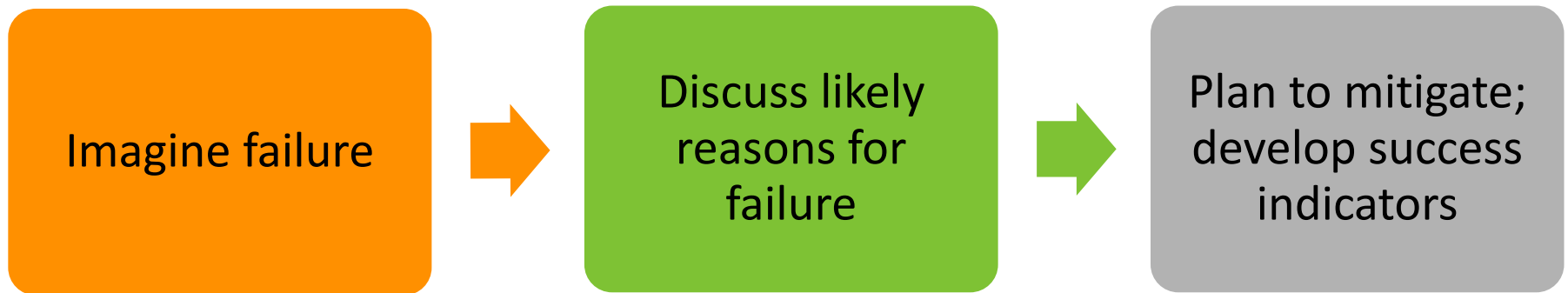
- When used: Planning of Year 1 Fall Leadership Institute + post-event debrief

Text Polling

- Purpose: Gauge participants' real-time experiences as they went through the Fall Leadership Institute

- When used: Six points throughout the two-day orientation

?

What is the most pressing thought on your mind?

What are you most excited to go home and implement/apply?

2b. What is the most pressing thought on your mind right now?

🔒 Poll locked. Responses not accepted.

massage children humbled pushpossobilities energy fun escaping climate needaction headache howdoibegin meet excited hot learn break scotland sedentary yah networking change violence cold housing tea need justice let'sgo rest hillary equity freezing discrimination karyn empathy talk job awesome new innovation stretch work positivechange oakes neighborhoods ideas

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Challenges and Lessons Learned

Generating understanding and excitement around RCL

- Hold **RCL webinar** with interactive discussion
- Conduct **text polls** and show **real-time results**
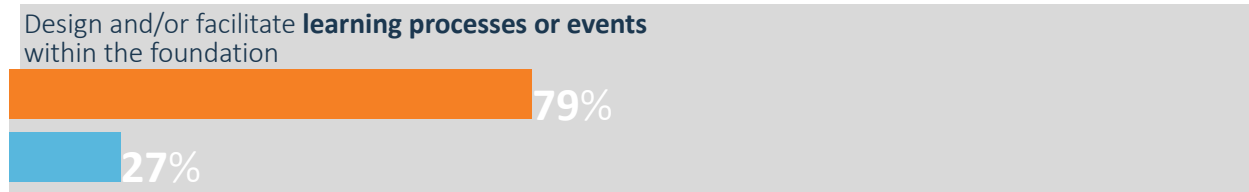
Using the findings

- Have a **liaison integrate findings** into team meetings
- Develop **customized recommendations**
- Create **evaluation workgroup**

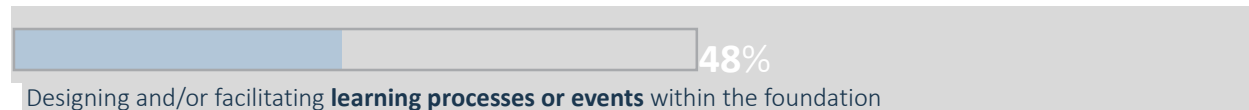# How the Design Stage Evaluation Positioned Program Implementation Evaluation

Rapid Cycle Learning Trends in Philanthropy

- "High-quality, low-cost evaluations and rapid, iterative experimentation:"—OMB memo July 2013
- Foundations are doing it, but still not a core priority

Foundation evaluation staff spend time on activities and if it is a priority

Design and/or facilitate **learning processes or events** within the foundation

79%

27%

Foundation doesn't spends too little time

48%

Designing and/or facilitating **learning processes or events** within the foundation

"Benchmarking Foundation Evaluation Practices" (2016) CEP and CEI

- Learning sits behind other activities that take center stage

Requires a New Way of Thinking

- How to ask good questions

- Asking them regularly (rather than at a point in time)

- Integrating information YOU collect deliberately into decision-making

- Starts with program design

RCL and Program Design (Strategy)

- RCL in a developmental evaluation context

- Sets clear expectations for design phase (accountability)

- Opens "blackbox" of foundation strategy

- Sets the stage for future evaluation

- It IS a learning culture change intervention

Pitfalls of RCL for Design Phase

- Design can feel irrelevant as things move forward

- Could set negative/adversarial tone

- Lack of knowledge management leads to "lost" design lessons as new ideas emerge

Thank you!

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