

Growing Evidence Over Time

Using learning memos to chart a
long-term research agenda

Michael Long
Andrew MacDonald

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Texas Evaluation
Institute

Austin, TX





Learning Objectives

By the end of this presentation, you will understand:

- How to create and use a learning memo
- How to develop a long-term research agenda
- How to move up the evidence continuum

Learning Memo

A learning memo is a requirement in the 2018 NOFO for grantees submitting an evaluation report.

- This means any grantee, regardless of award size, that is applying for its third grant cycle

A learning memo should be short

- No more than 3 pages double-spaced 12 point font

A learning memo must cover four topics:

1. **A short summary of key lessons from the evaluation**
2. **An explanation of how you will incorporate these lessons into your strategy, design, or implementation**
3. **An explanation of how these changes will improve your program**
4. **A discussion of how these lessons will inform your long-term research agenda**

Learning Memo

Learning Memo	Evaluation Report
<p>Focuses on topline findings</p> <p>Interprets findings and describes programmatic changes</p> <p>Explains how these changes will improve the program</p> <p>Contextualizes findings within long-term research agenda</p>	<p>Summarizes program background and theory of change</p> <p>Includes in-depth description of evaluation design, data collection methods, and analytic approach</p> <p>Provides detailed findings on all indicators</p>

Learning Memo

Summarize key lessons from the evaluation

Process Evaluations

- What can you learn about your inputs, activities, and/or outputs?
 - Are you serving the population your intervention is aimed at?
 - Do your members have adequate training to implement your activities as planned?
 - Are you implementing your model with fidelity across sites?

Outcome evaluations

- What can you learn from short-, medium-, and long-term outcomes?
 - Do beneficiaries of your program demonstrated improvements in their knowledge?
 - Do improvements in knowledge translate to changes in attitudes or behavior?
 - Do changes in attitudes or behavior lead to changes in beneficiaries conditions?

Learning Memo

Explain how you will incorporate these lessons into your strategy, design, and/or implementation.

For example, the lessons from your evaluation might cause you to:

- Change your logic model
 - Improve your training approach
 - Adjust the way you recruit program beneficiaries
 - Revise your performance measures
 - Update your evaluation plan
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- On the next slides, we'll give some examples as we talk about using these lessons to improve your program

Learning Memo

Explain how your changes will improve your program

Process evaluations

- *Example: Our program is intended to help low-income, first-time parents learn parenting skills. However, **our process evaluation showed that most of the families who attend classes have above-average incomes.** **As a result,** we changed our recruitment strategy creating new flyers and forming a partnership with social services agencies. These changes **will improve** our ability to reach the people we intend to serve.*
- *Example: **Our process evaluation found that AmeriCorps members were confused about the terminology used in our training materials.** **As a result,** we revised our training approach to include more time for questions and answers. These changes **will improve** our members ability to deliver our program with fidelity to our model, resulting in more consistent progress across sites.*

Learning Memo

Explain how your changes will improve your program

Outcome evaluations

- *Example: Our outcome evaluation found that students who participated in our college preparation program improved their knowledge about how to apply to college, but they were not more likely to actually apply to college. **As a result**, we added hands-on assistance with college application process. This change **will improve** our program because it means we provide more practical assistance to our beneficiaries.*
- *Example: Individuals who attend your financial education seminars demonstrate improved knowledge of how to budget, but we are not sure if this translates to increased savings. **As a result**, we are planning for our next evaluation to include indicators for financial behavior. This change **will improve** our program because it will help us better understand the relationship between financial knowledge and behavior, which can help us make our training materials and delivery more practical.*

Learning Memo

Discuss how these lessons will inform your long-term research agenda

- **Your learning memo should set up, and be a part of, your long-term research agenda.**
 - When writing your learning memo, be clear about how you plan to build off your findings in future evaluations.
 - Explicitly mention in your learning memo where you have made any changes to your long-term research agenda as a result of your evaluation.
 - As we will discuss next, your long-term research agenda should cover a period beyond your current grant.

Long-term research agenda

A long-term research agenda is a forward looking plan that puts your current evaluation efforts into a broader context. It should be:

- **Progressive.** In other words, it should build on what you have done in the past and are currently doing with your research plan.
 - For example, if you carried out a process evaluation before, and are currently implementing a pre/post outcome evaluation, then your long-term research agenda may describe how you plan to introduce a comparison group in your next evaluation.
- **Strategic.** Your long-term research agenda should reflect the broader goals of your organization.
 - For example, if your organization has intentions of growing an existing program, then your long-term research agenda may focus strengthening your evidence on that program. Conversely, if your organization is considering expanding to new service areas, you may consider how you can learn about those service areas through process evaluation.

Long-term Research Agenda

So what does a long-term research agenda actually look like?

- It should start with a broad goal.
 - “Our organization’s long-term goal is to produce strong evidence that volunteers serving as mentors throughout a child’s schooling can improve their odds of graduating high school and enrolling in college. We intend to show that our program’s mentorship model can be successful in multiple contexts and for a diverse range of students.”

Long-term Research Agenda

- **It should explain what research your organization has done toward achieving this goal, and also what research gaps exist.**
 - “Our organization has carried out an outcome evaluation showing that students who work with our mentors report improved attitudes toward school in one elementary school. However, there are research gaps as to whether our program can be implemented with fidelity at elementary schools in different contexts, whether improved attitudes can be attributed to our program, and whether improved attitudes in elementary school lead to improved academic outcomes in middle and high school.”

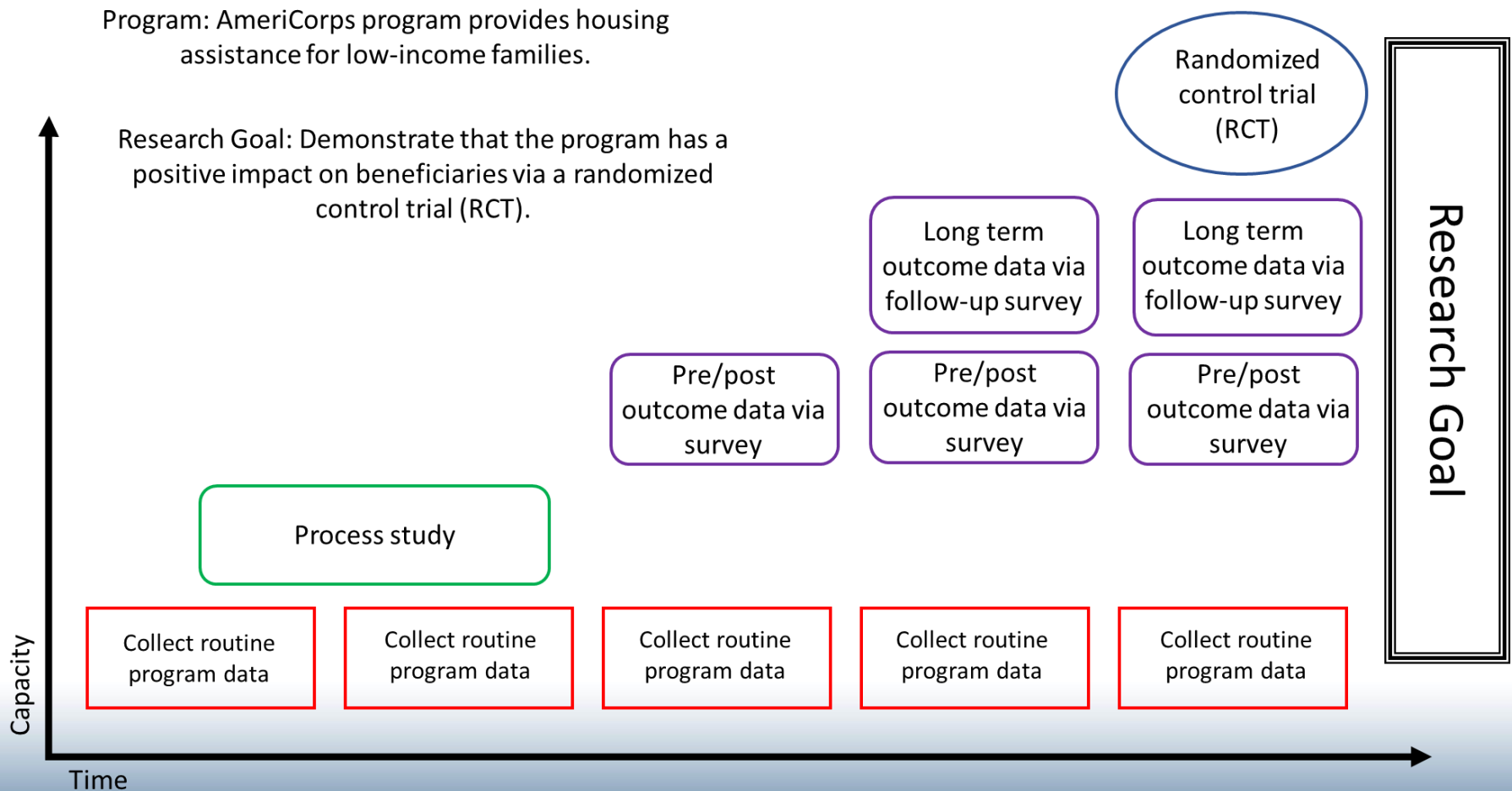
Long-term Research Agenda

- **It should explain how your plan to address these research gaps in the years ahead**
 - “Going forward, we intend to introduce our program at more elementary schools and use process evaluations to assess how our program is implemented in new contexts. We also intend to design an impact evaluation, so that we can attribute any changes to our program and achieve a moderate evidence tier. Eventually, we plan to study whether our program works in multiple locations with different student populations, and thereby attain a Strong evidence rating.”

Evidence-Building Over Time: An Example

- During your **first grant cycle**, you work on your data collection systems and start building consensus about your evaluation goals. When you apply for your second grant cycle, you are rated in the no evidence tier.
- During your **second grant cycle**, you conduct a process evaluation to determine if you are implementing your activities as planned. When you apply for your third grant cycle, you are rated in the pre-preliminary evidence tier.
- During your **third grant cycle**, you conduct an outcome evaluation using pre-post surveys to assess whether your program had the expected effect on participants. When you apply for your fourth grant cycle, you are rated in the preliminary evidence tier.
- During your **fourth grant cycle**, you conduct a similar pre-post survey, but this time also collect data from a comparison group to prove that the change is because of your program. When you apply for your fifth grant cycle, you are rated in the moderate evidence tier.
- During your **fifth grant cycle**, you conduct the same impact study across multiple program sites. In subsequent grant cycles, you are rated in the strong evidence tier.

Example: Stages in a long-term research agenda



Considerations when developing your long-term research agenda.

- **Your past and existing evaluation efforts.**
 - Think about what you have done already and what are logical next steps. For example, if you have carried out an outcome evaluation, you may be ready to introduce a comparison group.
- **Your program's resources and plans**
 - There is a delicate balance between being ambitious and realistic. Try to align your plans with your organization's overall strategic plan.
 - Remember that strong evaluations can help you access additional resources, such as new grants
- **Your funders' requirements**
 - Consider what grant cycle you are in, what your current value of federal funding is, and what you plan to apply for in your next cycle. You may be required to carry out an impact evaluation, so it makes sense to start planning for it now.