>> [Elizabeth Laferriere:] Hello, everyone. My name is Lizzy LaFerriere, and I serve as Senior Innovation Advisor at the Office of Population Affairs, or OPA. Welcome to today's webinar, Formative Evaluation Approaches Appropriate When Developing an Innovative Intervention. This is the third in a series of webinars on evaluation that's been delivered by Mathematica, OPA's evaluation technical assistance provider. These webinars are open to anyone who's interested in learning more about rigorous and stage-appropriate evaluation approaches used across the various types of OPA-funded projects. I'm glad that you're here, and I'd like to set the stage for what you can and cannot expect on the call today. Next slide, please.

So today, we'll be discussing different evaluation activities for two main phases of the innovation development to testing process. First, the creation of an innovation, and second, the development of evidence for an innovation. We'll also be answering general questions about the content presented on the webinar today. You can enter questions at any time using the chat feature. We'll also offer some time at the end of the call today for the presenter to answer any additional questions you may have. However, on today's webinar, we will not be answering any questions specifically about any of the TPP notices of funding opportunity, or NOFOs, or any other grant program, and we'll not be answering any questions about any individual proposals or provide specific guidance on an individual grant application. If you do have NOFO-specific questions, please reach out to those contacts that are listed in the funding opportunities. So at this time, I'd like to turn the presentation over to our main presenter today, Cay Bradley. Cay, the floor is all yours.

>> [Rick:] Oh, hey, Cay, forgive me, you are on mute.

>> [M.C. Bradley:] I forgot. You knew I was going to do something. All right, so for those of you who have not met me in person, I am including a picture of what I looked like a few years ago with red hair and freckles. As you can see now, the freckles are still here, but the hair is gray and much longer. My name is Cay Bradley, and I've interacted with TPP grantees since 2010, so I've worked with some of you maybe. I'm a former high school teacher and a sexual education trainer, and I have a love for metaphors. And if you've ever attended a webinar or a presentation with me, you know that. I appreciate critical friends, so I embrace that role, which is how I view providing Eval TA to local grantees. I was a part of the Eval TA team for the 2010 and 2015 TPP grantees, and I rejoined the TPP Eval TA team with the Innovation and Impact Networks last year. I tend to work in the systematic review, Evaluation TA, and child welfare space, and I nearly always work in adolescent space. So I'm going to take a moment to share the agenda for today.

We're going to start off with a reminder of the continuum of evidence that Mathematica has been using in our previous webinars just to orient everyone. And then we'll talk about the two phases of innovation work that Lizzy mentioned, developing an innovation from an idea or because you see a gap or a need, and also building evidence on a defined innovation. These phases are connected and may get you in a bit of a feedback loop, which is not a bad thing. We'll also talk about the type of evaluation activities you may think about with each phase. And I'm using the term evaluation activities because I want to embrace that full spectrum of evaluation activities, not just focus on two-group effectiveness evaluations. I also want to remind everybody that learning matters, and we'll have some thoughts on how to think about what you might want to be learning during the innovation work. So a tip, when you see a slide like this one with the teal, yellow, green, and blue in the bottom corner, it means there's a change in topic. And another tip point about today, there may be some terms that I use that feel unfamiliar. All of the terms that I use have been defined by OPA, so things like fidelity in places like the glossary of their recent NOFOs or other products and resources that can be found on their website.

The nature of working with innovations is to focus on early learnings, since by definition there's likely limited or no evidence on the innovation to date. So it's important to always learn, both to improve your own work and your innovation, and also to advance the field. When you focus on innovations, a lot of the learning may feel or look like failures, but those are equally important to what feels like a success. OPA has told me over and over again, and you all as well probably, that they value learning from failures. So they encourage us all to embrace our failures, to collect, in other words, document the failures, and to share both our successes and failures equally. Lizzy often reminds us all that FAIL simply stands for First Attempt In Learning. So embrace that.

This slide may be very familiar if you've attended the other three webinars that Mathematica has offered. Your goals for the program and the research questions you want to ask should drive whether you're doing a formative or summative evaluation, and the type of study or studies used within the formative or summative bucket. This figure shows six types of studies you could undertake, and an example of the research questions each study can answer. I'm not going to talk about all of the study types. Rather, like in Katie's Monitoring and Evaluation webinar, we're going to focus on the formative evaluation section. This section is on the left-hand side of the figure and includes three ribbons, as indicated by the gray box and the dark blue arrow at the bottom of the slide that reads formative evaluation. So the first one is a needs assessment, which can help you answer the question, what's known about the landscape in which the program, or in our case, innovation, will operate? An implementation study will provide evidence to answer, does the program operate the way it was intended to operate? And an outcome study begins to answer, is the program associated with favorable outcomes?

However, the focus of the evaluation activities will differ by the phase of innovation. For example, you may be really focused on needs assessment and implementation if you're creating an innovation, if you're in that first phase. If you have a defined innovation and you're focused on developing evidence, you may be more in the implementation study and outcome study areas of formative evaluation. That doesn't mean, as I'll talk about in a moment, that you can't do any of these activities in any phase. On the right side, there are two ribbons in the yellow dotted box, which include evaluation activities that you may conduct as a part of the innovation work. For example, once the development of the innovation is over, you may want to study what types of system changes would be needed to support successful implementation. Additionally, you may want to start collecting evidence from an economic study to help people understand that investing in your innovation would be a worthwhile investment. For example, does your innovation decrease costs associated with implementation because it's a virtual implementation? If you want to learn more about this continuum, head on over to the RHNTC website, which is rhntc.org, and listen to the recordings of the EVAL 101 monitoring and evaluation or rigorous testing webinars offered earlier this year by my colleagues Jean, Katie, and Lauren. So I'm using the term evidence broadly, and it's really just information that will support others in continuing to invest in or to support testing of your innovation. If you think about the first three boxes on the continuum, each provides a particular type of evidence that can be useful in gaining or retaining support for your innovation.

If you think about a needs assessment, you're showing others that your innovation is needed and important. You're showing them where the gap is. You're showing them what might happen if the gap is not addressed. You're talking about the fact that there's truly nothing out there that can help address the gap. You're talking about what has been tried before and what was learned from those previous trials. In the implementation study, you're demonstrating that the innovation can be implemented, that people can be trained to deliver the innovation, and that people will host it and people will participate. You're also beginning to document what fidelity would look like and what they're going to have to do if they want to provide your innovation with fidelity. With an outcome study, you're beginning to show that the innovation can change parts of the outcome change that will eventually lead to the outcomes of focus. Remember, your outcome chain comes from your logic model. It's the series of outcomes that lead to the big ones. For example, changing people's knowledge may change their intention, which in turn could lead to fewer unintended pregnancies. With an economic study, you're documenting the costs associated with your innovation and implementing it. You're helping people think about how much money they need in order to implement your innovation in their space. And you're beginning to build the information that could be useful in other types of economic studies, like cost-benefit studies.

And finally, with a systems change study, you're starting to think about and document what systems need to do to support the innovation. Similar to economic studies, the information you collect now may feed into future studies. For example, doing a descriptive study focused on what had to change, and that could help you identify the systems and sites where the innovation may be successful or milestones to track. When I think of innovation, I always think of these two phases. The first phase focuses on creating the innovation, while the second one focuses on developing evidence for a defined innovation. You can and will develop evidence as you're creating an innovation, but the innovation is your main goal. I'm going to talk about the two phases, and in some ways, it may feel like I'm suggesting there are well-defined paths for either phase.

However, that is not true and not what I'm advocating for. Rather, I'm suggesting that there are questions that are natural to ask and tools that could help you in each phase. Part of the beauty of innovation is the flexibility to go in different directions. So let's talk about the creation of innovation first. I'll give you an overview of the work in this phase and then talk about specific evaluation activities that might be conducted to help you in this phase. This is not exhaustive by any means. It's just a way to help us get on the same page. So this slide includes a table with three rows, and I'll talk about each row in just a moment. As a reminder, the focus today is on evaluation activities, not the creation of an innovation. So I'm not going to get into all the details and processes that you need in order to create an innovation. The top row of the table says starting point, and your starting point here is a great idea or a developing idea to address a need or a gap. The middle row is where you're going to be at the end of this phase with a defined innovation and some initial evidence that it does, in fact, fill the gap or address the need, and it would be used. Defining an innovation, for me, could include having a theory of change and a logic model in addition to whatever curriculum or tools are needed. I see a hand has been raised.

Do you want to put your question in the chat? While we're waiting for that, the bottom row is what you're not going to know at the end of the development or the creation phase. There's nothing in your creation of innovation work that will tell you that the innovation works. You're not going to have the information to tell you whether or not it makes a difference in outcomes. So how do you go from the starting point or the first row in that table, the idea or gap that you've decided to address, to the endpoint, a defined innovation? You're going to start with an understanding of what's going on related to your innovation. This may be that you're conducting a needs assessment or an environmental scan. Using the evidence from that needs assessment or environmental scan, you're going to do the magic of creating the innovation. For now, we're just going to wave our hands and you magically have an innovation to focus on. As you start moving forward, you're probably going to want to do an implementation study, but focusing on whether or not you can put the innovation into practice. Are you getting the resources that you need? Can you actually train people to deliver it? Do people want the innovation? What does fidelity look like? Do you think the innovation may be moving people in the direction that you had hoped?

So those are the types of questions that you might be asking in an implementation study during the creation of innovation phase. So let's move on to the second phase or the other phase of innovation, which is the development of evidence. And this is when you have an innovation that is well-defined or has completed the creation phase. But let me share that some innovations are going to cycle back and forth between the two phases, and that's perfectly okay. You, your funders, and your partners are going to want to make sure that you're investing in the right innovation and giving people the right resources for the phase that they are in.

All right. So let's talk about the overview of the development of evidence phase. And this slide includes the same table with the same three rows, the starting point, the end goal, and what's not known yet. But we're going to have a different starting point. Here, we are starting with a defined innovation. And so, how does evidence fit into defining that innovation? I would offer that a defined innovation has evidence because it should have a theory of change and a logic model at a minimum. Ideally, there's also a draft manual to support moving through developing evidence. And I know that OPA-supported webinars and tools have been developed to help people think about logic models, and there are other resources out there as well. The end goal, or the middle row, is to have some evidence that the innovation not only can be implemented, because remember, that's what you were doing with creation, but also that additional investments are a really good idea. So you want to have concrete things that you can show people. For example, you may want to show people that your innovation is stable. That is, you've worked out some of the kinks. Now, we can't always work out every kink, but you've worked out a lot of kinks. And you're likely going to have done that during an implementation study.

You're going to want to keep track of those bumps that you run into and the tweaks that you do and whether or not those tweaks address the bump that you hit. That's all evidence, and it may help your funders and your partners engage and support your innovation work. You also probably want to demonstrate that the innovation can be implemented in real conditions. Perhaps this means involving evidence from an implementation study about fidelity when you have new people delivering the innovation and showing that you can find people who are interested in it and to host the innovation and to engage with your innovation. And also, thinking about whether or not the innovation is going to fit within the confines of the environment that you think it's probably going to be implemented in. So showing that you actually can deliver your innovation in eight consecutive weeks as a part of a health class, for example. That can all be really helpful evidence to get other people to continue to engage with you. You may have some early evidence on whether the innovation leads to the desired outcomes, but not necessarily definitive evidence of its effectiveness.

So the big piece that's missing is the bottom row, whether or not your innovation is effective. As I just said, that's because evidence about effectiveness requires a comparison between groups, and to do the various formative evaluation activities I've been focused on, you don't need more than one group. We do have a question about resources for developing an innovation. I'm afraid that's not my area of specialty, but I'm going to say that to Lizzy so that we can perhaps address that at the end. All right. So let's talk now about some of the evaluation activities that you might be conducting during the development of evidence phase. The main thing here is that we need to understand what the innovation is and what evidence exists about it from the development phase, so in the creation phase. So that's likely going to involve an environmental scan. Now, some members of your team may already know this because they were a part of the creation of the innovation, and that's fine. But creating an innovation and developing evidence don't require the same set of skills, and so you may not have a whole lot of overlap in your team, and therefore you may not have the history and evidence as readily available, so you may need to do some work to find that.

You also want to think about going to scale, and when we think about going to scale, I think about fidelity. So you may be doing an implementation study, but this time you're looking at a continuous quality improvement element in your implementation study. And you can think about this implementation study as getting ready to do an effectiveness study. You want to identify and address hiccups. Is there too much information in the session? Do the materials need to be modified? And think about that process. You also want to test your CQI process or your continuous quality improvement process so that you can know whether or not you are tracking the right things in your CQI process. You can understand what kind of changes you might want to make now before you get into a bigger evaluation study, and you can see if those changes worked. Again, this evidence helps you show that you know the innovation can be implemented and demonstrates a commitment on your part to monitoring and improving the innovation. Funders and partners may be excited to see that type of evidence because it may make them feel safer putting their money in your innovation. They have faith that you're going to reassess the situation, not just throw the baby out with the bathwater. You're probably also going to want to do some type of an outcome study. In other words, looking to see whether or not the innovation can move the needle the way that you want it.

This evidence that you're moving the needle is helpful, again, for your funders and your partners because it begins to make your innovation look like a better bet. We all want to support things that we think are going to accomplish what we're trying to accomplish. So if you can show that you've made those movements, that's a good thing. You don't need a comparison group for an outcome study, nor do you need to focus on those long-term outcomes. Use your logic model to identify short-term outcomes or early outcomes that are needed to get those later outcomes of interest. So maybe you focus on attendance and knowledge and intention, all of which you could have been looking at during your creation phase, too, of course. And now you begin to look at behaviors and behaviors that would lead to a decrease in teen pregnancy or sexually transmitted infections, for example. You may also want to actually do a pilot study. In a pilot study, you're going to use a small sample and you're going to focus on those short-term outcomes, but you have a comparison group in all probability so that you can say, hey, look, my innovation actually improved the outcomes here. You also need to think about those systems that you're going to have to interact with and whether or not changes are needed there.

All right. This is my last big topic, but it's an important one. So I'm going to remind you all that OPA values learning of all kinds, particularly in the innovation space. We can't all knock the ball out of the park on the first shot. So you can learn in the creating innovation phase and in the developing evidence phase. And you can use those learnings for their own phase, right, so you can have that feedback loop within a phase for an innovation or you can use those learnings to connect with the other phase. But what could that look like? So first of all, please embrace any kind of learning. We should learn from our successes and we should learn from our failures. I know we all prefer to learn from successes, but I've certainly learned a lot from things that people considered failures.

So remember thinking about fail as first attempt in learning and not actually as a failure. And while our first attempts in learning are more likely to lead us and our innovations in a different direction, that's actually okay. And it can be super exciting. You could learn something and go, oh, my gosh, I actually need to go this way. So this brings up the second point I want to make here, which is about rinse and repeat. And I think this is the beauty of innovation. You are expected to circle back. You are expected to figure out if something didn't work the way you wanted it to and go back and figure out why it didn't work that way and try something else and see if that worked.

Third point here is what questions are of interest to the innovation team? This is going to help guide your learning, in particular, a development of a learning agenda. And that means it's also guiding your research questions, which, remember, are going to guide the types of evaluation activities you're conducting. But it's really important to remember, it's not just about your team and what you want to learn. Which brings us to the final point. How do you make sure you and others are learning about the innovation as it is being created or as you are developing evidence on it? So I encourage people to think about what you wish others published for you to learn from. Do you really just want to learn about their impacts and their effects? Or do you want to learn what else they learned? Do you want to learn about tips and tricks that they found worked or didn't with respect to engaging youth or recruiting organizations to be their partners? Do you want to learn what they had to do in order to define and understand fidelity? Do you have any interest in learning what it takes to define an innovation? Do you want to know the processes that people use and the way they teamed? What do you think a defined innovation means? And what would you want to see if somebody else defines their innovation as defined? What about how to steadily build evidence for an innovation to keep it moving forward? What does that look like? What kind of documentation does a team need? What kind of information is the field going to want to have? What did you try? What happened? Then what?

So now the kicker is that in order to learn, you also have to share your learnings. So you've got to get it out there. You can't just have a moment in a team meeting where you talk about it. So think about how do you make disseminating your learnings a part of your project? Where are the best venues for sharing your learnings? And remember, different learnings may need to be in different venues. And are you comfortable sharing your first attempts in learning as well as your successes? If you're not, what can you do to make yourself more comfortable sharing those first attempts too? My colleagues have talked in the previous webinars about resources available on the RHNTC website. So it seems fitting to show that there are resources there for people working in the innovation space as well. This is a snapshot of my search for resources that included the word innovation. There were 34 results, as you can see. And the URL is on the slide, and it also just got dropped in the chat. So please do make sure you go look at the RHNTC website. It has a lot of really great resources. All right. I'm going to turn this back to Lizzy because she gets to moderate the Q&A session. But just as a reminder, neither Lizzy nor I are going to talk about the NOFOs or taking questions about individual applications or projects. But we are open to your questions. And, Lizzy, I'm going to remind you that we do have one question about resources discussing how to develop an innovation.

>> [Elizabeth Laferriere:] We sure do. What a question, too. Thank you. Before I jump into that, thank you, Cay, for a great presentation, of course, and also for really driving home the importance of intentional learning and beginning early and ongoing as a continuing practice for learning in the innovation space. So there are two ways for folks to ask questions. You can either drop a question into the chat, and I will read it out loud to Cay. The other option is to select the hand-raised feature at the bottom of your screen, and we will ask our colleague Rick to unmute you so you can ask your question directly. We do have a couple. So we can start with the question that was asked originally, which is, can you point to any webinar discussing how to develop an innovation? So the RHNTC website that we dropped in the chat doesn't have any necessarily about innovation development itself. However, it does have some really great resources about past experiences in innovation. There's one in particular I'll drop in the chat that is a really insightful conversation between two of our former innovation grantees from a past cohort. That's a great conversation to listen to, to just understand some of the processes and challenges that come up during this period.

A few other things I'll note is we're not talking about the NOFO here, but if you are interested in a resource list from the NOFO, there is a long resource library at the end as a resource for you on innovation science, innovation development, and testing. So I would check that out as a first place to start on resources related to innovation. And the final thing I'll note is that a couple, you know, OPA actually uses a lot of design thinking in our own work. Design thinking is an approach to thinking about the world and improvements we can make to it around us. And we have a lot of success using resources from an organization called IDEO. If you check out this website I'm going to drop in the chat, it's a great resource with additional diverse resources related to innovation, innovation development, and testing. And I'll drop in a second one that includes a design kit, also really incredibly helpful. OPA and HHS do not endorse any resources.

All I'm saying here is that we have often found helpful resources on this place. The last one I'll share is USAID, a government agency, federal level, has an incredible innovation shop. And they do a lot of global health related innovation. I recommend you check out their resources as well as a federal partner in the space. And they do have a number of e-learnings related to innovation, which are excellent. So let's see if there are any in the chat. Any other questions? Otherwise, I do have one that we received earlier. Okay, seeing none. Okay. Cay, I have a question about staffing for you. So the question is kind of when we're still in the early stages of innovation, development or testing, is it necessary to have an external evaluator lead that evaluation? Why or why not?

>> [M.C. Bradley:] Sure. So that's a great question, Lizzy. So the first thing I'll say is you need to pay attention to whatever your funding opportunity or funder wants. We do work with funders who want an external evaluator from the beginning. They want that independence between the design work and the evaluation work just to make sure that there is, you know, a distinct group. So the first thing to do is pay attention to your funder or your funding requirements with respect to how external your evaluator is. I will share, however, that even if they are an external evaluator, it can be really helpful to make sure you're talking to them from the beginning and working with them and having a partnership. It's not so that their work is influenced by your passion in your innovation, for example, but it's more about both of you learning from each other and thinking about, you know, if you're going to change something in your innovation because you think it's going to fix the problem you're having, that's great.

But you also want to make sure you've talked to the evaluator so that they know what data they might want to collect in order to be able to tell you whether or not that change works. And sometimes I've seen programs come up with great ideas and the evaluator's like, I can't work with that idea. There's no way for me to collect the data that we need. And sometimes evaluators come up with designs that they want. And the program person is like, what the heck? We can't do it that way. So even if they're independent and external, having some communication, ongoing communication with them is an important thing. I hope, Lizzy, that addressed the question and that my emphasis of thinking about what the funder requires was appropriate as well. Lizzy, you're on mute.

>> [Elizabeth Laferriere:] There we go. Thank you. So one of our questions is about the NOFO webinar. So again, we're not answering any questions about the NOFOs. If you go to grants.gov/recordings, Q&As are all posted there. Another question about eval for you, Cay, has to do with you brought up learning a lot and you brought up the importance of intentionality in learning. And one of the things we've talked about is in learning agendas, the importance of not just having questions and activities, but also an idea for the products, like what the final result looks like. Can you talk a little bit about kind of what types of products folks might consider as part of a learning agenda and how they should decide which one makes sense?

>> [M.C. Bradley:] Yep. So it's a great question. And I think, again, this is something for a team to think about and to think about what their funders and partners are looking for. So I have seen people share their learnings in very formal reports. I have seen them do it in peer-reviewed journal articles that they're drafting. But I've also seen people take the time and recognize the importance of sharing their learnings with their partners throughout the process. And so doing quarterly meetings and sharing what's happening and what's going on and what they're learning, I have seen people take findings to their partners and get their partners' input on things. And so that can be as simple as a slide deck that then becomes the foundation of a brief or a report or a presentation at a conference. But the nice thing is you've shared it with your partners first, and you've gotten their input and their take on it as well. So there's a range of products, and I really do encourage you all to think about that range of products. I think a lot of us who are evaluators, we will kind of lean towards, let's have a journal article, let's have a final report. And those are important pieces. It's not that they're not important, but I think there's a lot that you can do coming along that can also be really informative.

>> [Elizabeth Laferriere:] Excellent. So just a friendly reminder, folks, you can send questions in through the chat. You can also raise your hand and we can call on you. We have two more questions just came in the chat for you, Cay. So first is, can you speak to evaluation costs and how costs may be a factor and how to take that into account when thinking about that aspect of innovation?

>> [M.C. Bradley:] Yep. So evaluations, just like everything else in the world, have costs associated with them. And just like everything in the world with the costs associated with it, you have to think about the tradeoffs. So for example, this is one of the reasons why I really like working in the innovation space is because you all are not rushing to a summative evaluation. You're not rushing to that rigorous evaluation. You can still learn and still do evaluation activities that are not requiring you to have two groups, may not be requiring, you know, fancy surveys and all that kind of stuff. You might still be doing surveys. So I do think you should think about how much money you want to put towards your evaluation work and then make sure you right size your activities. And this is another reason why having conversations with your local evaluator partner is really important because they're going to be able to tell you, oh, no, Lizzy, I can't do that for $10,000. It's going to cost us at least 20 to learn what you want to learn.

And so it's important to have those conversations and to make sure that you are giving the evaluation the money that it needs in order to learn what you're trying to learn, because you risk not learning what you want to learn if you can't actually do it the way you need to. So I hope that helps. I'm not going to give you any ballpark figures because every evaluator is going to give you a different number for something. And part of that is just dependent on their staff and how their organization works. So you can, you know, if you get a number and it's too high and you've worked with two different evaluation partners, you're free to go talk to the other one and see what they think. But do make sure you fund your evaluation activities to the level that you need to in order to learn what you want to learn.

>> [Elizabeth Laferriere:] Fantastic. All right. We have another question in here. So this is a good question. You might have already covered parts of it, but I'm sure we can address it even more. What should I do with an innovation that isn't showing promising signs such as feasibility or desirability?

>> [M.C. Bradley:] So this is one of those places where if I'm working on something and it's not looking good, you know, where we're having trouble with enrollment or we're having a lot of staff turnover, I'm going to stop and I'll be like, oh, boy, I've got a problem here. And I'm going to back up to some degree and I'm going to start doing a lot of qualitative work. And the reason I'm going to lean towards qualitative work is because if I'm doing qualitative work, which are things like interviews and focus groups and class and observations, I can really sort of begin to dig into what might be causing the problem. Why do youth come to the first two sessions and then stop? I can go and have those conversations with youth and I can have conversations with youth who've continued in the program to try to understand why they stayed. And same thing with staff. Now, you know, it takes time to have those conversations, but I do think if things are not going the way you want, I encourage you to do a little bit of asking questions and also some brainstorming with your team members. And maybe this is a time when you do a focus group and you have a big brainstorm session, big being relative, of course, with both some of the people who are involved in the program and also your team to sort of try to figure out what's going on and what you might be able to do differently.

And then you can go and make a change and collect data and look at the data and see whether or not you got the change that you wanted. So for example, I work on another project called YARH, which stands for Youth at Risk of Homelessness. And we work with the Alameda County Social Services Agency, and they had an intervention that they were working on and discovered that they were having some trouble recruiting youth. The youth who are youth and young adults in foster care were not interested in the program. And so they stepped back and they thought, well, maybe our recruiting materials aren't very interesting. And they did some focus groups with some of the youth who participated and with their YAB, their Youth Advisory Board. And then based on the feedback from those youth, they drafted new materials and they took those materials back to youth as well. And there's actually -- sorry, Lizzy, to plug another program from another funder -- but there's actually a brief on the OPRE website about that and the work that they did. But again, that's an example of how you can sort of realize something isn't going quite right, step back, take some steps to learn, do some evaluation activities to learn, and then move forward.

>> [Elizabeth Laferriere:] Fantastic. We can even share that if you'd like in the chat, Cay, though I'll be heartbroken.

>> [M.C. Bradley:] Yeah. So Russ, can you go find that link for us and share it? Russ works with me on YARH, so he knows if he Googles OPRE and YARH, he'll get to the OPRE website and can find that pretty easily. So I'll put that request out there. What's next, Lizzy?

>> [Elizabeth Laferriere:] We have two more questions, but others feel free to keep sending your questions in. We have a good chunk of time left, so we might be able to get one more after. So Cay, you mentioned systems change evaluation up front. Some innovators do focus on systems level or environmental changes. Would your approach to formative testing or early summative evaluation change if your intervention is focused on that level?

>> [M.C. Bradley:] Great question. I personally don't do a huge amount of systems change work. It doesn't mean I haven't thought about it. So let me just share with you my initial thoughts. And my initial thought is no. You should still, in formative evaluation, be thinking about what your research questions are and then thinking about the approach. And that's true whether you're doing innovations related to individuals, to the youth, or to the caregivers, or to a system. You're still going to want to take that time to think about, okay, like, I think the system has this problem. Well, show me. Tell me why you think the system has that particular problem. And that's going to be that needs assessment and environmental scan that you're going to do. It's just that your unit that you're looking at, if you will, is different. It's not youth. It's systems. So I think that the process would be pretty similar. It's just, you know, kind of what unit are you looking at? Are you looking at youth and caregivers, for example, or are you looking at systems? But I think the formative evaluation approaches could be very similar, even if you're focused on changing a system, and that's what your innovation is about.

>> [Elizabeth Laferriere:] And I believe that you all have a recording of a systems change evaluation.

>> [M.C. Bradley:] I believe we do as well, and I believe that my colleague, Russ, might have been involved in that, but I could be wrong. But yes, I know we have done things about system changes before. So there's resources out there. They're probably on the RHNTC website.

>> [Elizabeth Laferriere:] Yes, they definitely are. And this webinar will also be posted to the RHNTC along with the other two webinars in this series. One more question in the chat, Cay, and I'm wondering if you can go back to the slide that shows the spectrum of evaluation activities. The question here is -- oh, perfect. You did that so quickly. The question is, clearly, an innovation will go through multiple phases. Multiple evaluation activities will be appropriate for different phases. So the question is, do you need to focus on one type of evaluation activity before moving on to another? And how do you decide where you start?

>> [M.C. Bradley:] Oh, that's good. So first of all, I'm going to take the easy one off the table, if you will, and that's the impact study. I do not recommend anybody invest in an impact study until you know something about that innovation or you've read evidence that other people have developed about that innovation. An impact study is going to be looking at whether or not the program is causing favorable outcomes. You're going to have two groups. You're going to want data. And if I had just sat down and scribbled out my little innovation and that's all I've done, I don't want to go straight into an impact study. Now, I could be really lucky and I could find my favorable outcomes straight out of the gate and, you know, winner, winner, chicken dinner. But the chances of that happening are slim because I don't actually know whether or not my innovation can be implemented. I don't know whether or not anybody will come to it. So why am I investing in an impact study before I know those simple questions, if you will? So given that, there is a little bit of logic in the layout of this diagram.

So I think in many ways, you know, doing a needs assessment and documenting what we know about the area where you're trying to do your innovation and what's the gap and what's the need and all of that is a useful first step. That doesn't mean you have to do it, but I think it can help you. And I think many of you do this to some extent. For example, if you're writing a proposal for any funder because you're laying out why they should be investing in your innovation work. To me, an implementation study is a logical next step, but you may be doing it with your outcome study at the same time. You may be collecting some of those outcomes at the same time that you're collecting a lot of implementation data in order to sort of be able to look at both of those pieces together. All right. But again, it kind of depends on what your team wants to learn or what your funders and partners want to learn. The only big one, like I said, is don't go straight from a piece of paper with your idea to an impact study. I think that's risky. Personally, I think that's risky. I will not say that for anybody else but myself.

>> [Elizabeth Laferriere:] I am not seeing any other questions in the chat at this time. If you still have any, please drop them in or raise your hand and we'll call on you. And, Cay, if we don't have any other questions, I have one more to put you on the spot.

>> [M.C. Bradley:] Oh, gosh. All right, Lizzy.

>> [Elizabeth Laferriere:] Which is, what is your favorite part about evaluating innovations?

>> [M.C. Bradley:] I promise everybody that I am not being paid for this response. My favorite part is watching the learning and seeing people embrace their successes and going, oh, crap, that didn't work quite right, and backing up and using data to figure out where to go next. I think the creativity and the energy of working in the innovation space is fantastic and it's a whole lot of fun. The fact that it leads to better outcomes down the road is also exciting to me, but I'm really excited by the opportunity to sort of step back and reflect on what did you learn and use that to my advantage and to the field's advantage.

>> [Elizabeth Laferriere:] Beautiful. And I think something that resonates so much for me is that evaluation activities are also learning activities, and all of this is so deeply integrated into the innovation process, which kind of connects us to our next question that we received in the chat, which is many innovation theories incorporate some of the elements of innovation evaluation that you are mentioning, but they are incorporated as part of the design process. Is it critical to pull evaluation out as a separate entity, or is the critical aspect to continue to learn and apply learning to the next phase of the work?

>> [M.C. Bradley:] That's a great question. So I'm going to remind everybody that I'm an evaluator, which means I come from the evaluation side of the world and not the design side of the world. And I think the question helps to remind us all that you can have two different disciplines that are coming to the same place and describing it differently. So I don't think you have to -- again, make sure you're meeting your funding requirements and your partner requirements. Right? If they want you to have a completely separate unit doing evaluation activities, then do that. If they don't have that requirement, but don't keep them locked away, do talk to them. But I do think the important thing is to learn and to ask those questions and to figure out what data you need to collect in order to answer those questions and to be open to when you hit that hiccup in the road that you go, wait, let's stop. Let's look at what information we already have on hand that can help us understand this and think about how to solve this and what can we learn in the future. So I don't think it's necessarily important from the innovations perspective, if you will, if you have an evaluation and a design. I think from the innovations perspective, I think the innovation just wants you to learn about it and help it be the best innovation it can, if you will. So I don't think it has to be separate. But I do think some of us just have disciplines where we come at it looking at them as different things. I don't know if that answer made any sense to anybody but myself, but I hope it did.

>> [Elizabeth Laferriere:] It did to me, but please do drop in the chat if you have a follow up question. Yes.

>> [M.C. Bradley:] Oh, good. I'm glad.

>> [Elizabeth Laferriere:] And I wouldn't change anything you said, Cay, either. I completely agree. Any last questions? I don't see any hands raised. I don't see any more questions in the chat, but I'll give it one more minute. Okay, I am not seeing any other questions, Cay. Anything you would like to end on?

>> [M.C. Bradley:] No, just like I said, I think innovation is an exciting place to be, to be working on innovations and the creativity that people bring and the energy that they bring is just -- it's so wonderful to see that. And I just hope everybody continues to embrace learning and use the phrase evaluation activities on occasion.

>> [Elizabeth Laferriere:] I think she's required as an evaluator to say that.

>> [M.C. Bradley:] I am. I think I'd be thrown out if I didn't mention the love of evaluation activities.

>> [Elizabeth Laferriere:] Wonderful. Cay, thank you so much. That was a fantastic session. And thank you to the entire Mathematica team for making this webinar series possible. Like we said, the webinar recording will be made available probably within the next week on the RHNTC.org website. And with that, thank you for joining us. Have a wonderful night.

>> [M.C. Bradley:] Have a good day, everybody.