

Scaling What Works:

Evaluation for Reinvention and Adaptation

R. Sam Larson, PhD
larsonrs@msu.edu

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- Study Review
- Reinvention
- Adaptation
- Implications for Evaluation



Strategies to Scale Up Social Programs:

Pathways, Partnerships and Fidelity

R. Sam Larson
James W. Dearing
Thomas E. Backer

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Scaling Out (or Up)

A process for **significantly** increasing the number of **sustained implementations** of a **successful program**, thereby serving more people with comparable benefits

Guiding Questions

- How does the pathway chosen for scale up affect scale up success? What are the unique dynamics of each of the three types of pathways examined in this study?
- What types of partnerships drive the scale up of social programs? What primary role do partners play? How do partners find each other?
- To what extent do social program leaders work with partners to reinvent programs prior to attempting scale up? How do scale up partners manage program adaptation by implementers?






Strategic Choices Common to Scale Out Efforts

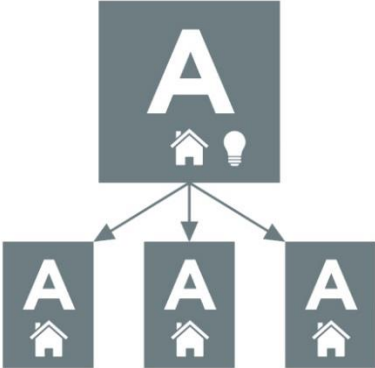
Study Approach

- Innovation identification: Expert identification, literature search, web search
- Selection criteria: Evidence of effectiveness, achievement of scale up, presence of partnership, scale up strategy, currently active, topical domain
- Literature review: Academic and practice
- Breadth: Content analysis paired with leadership interviews for 45 innovations
- Depth: Additional interviews, site visits, and case study reports for 4 innovations
- Analyses: Descriptive statistics, thematic, case study

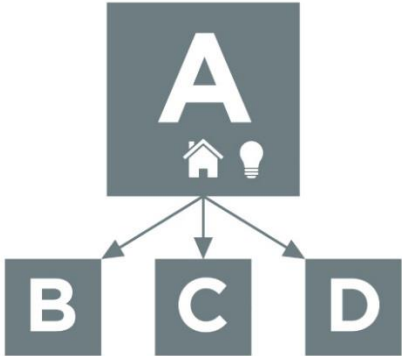
Pathways

-  INITIATING ORGANIZATION
-  EFFICACY TESTING
-  NETWORK ORGANIZATION

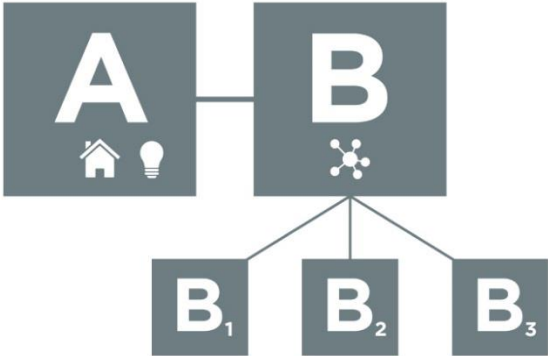
BRANCHING STRATEGY



AFFILIATE STRATEGY

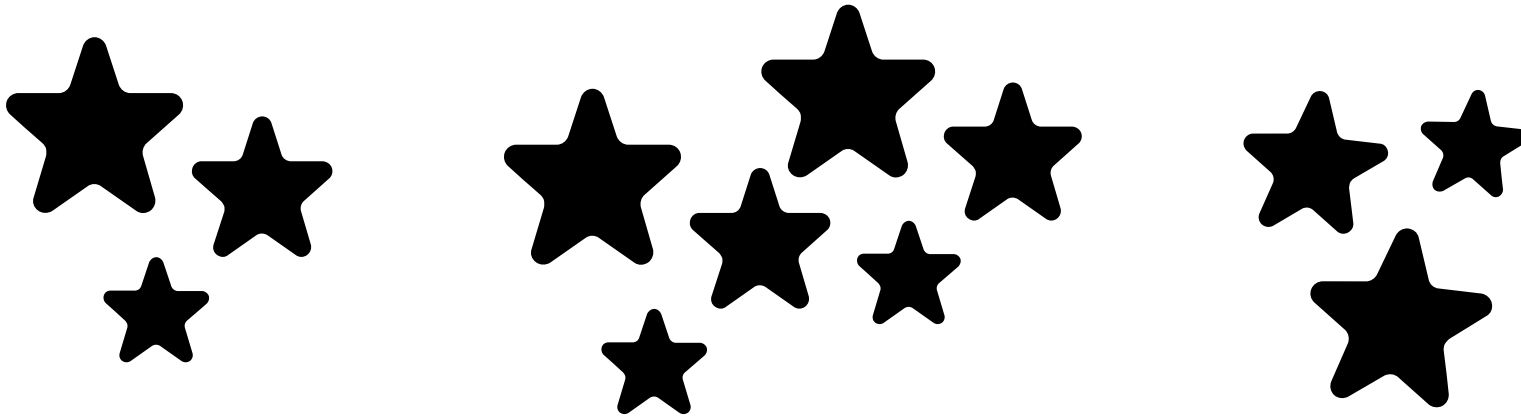


NETWORK STRATEGY



Health	3	9	7
Education	9	11	6
Total	12	20	13

Partnerships



Lead Partners direct scaling efforts

Support Partners provide expertise/funding

Implementing Partners that provide direct services to beneficiaries

Distribution Partners provide connections to local implementers

Fidelity

The **extent** to which a program is implemented in the way **intended** by its **developers**, particularly with respect to **critical elements** whose **benefits** are supported by **evidence**.

In practice, fidelity is about efficacy and organizational identity.

*“The simpler the thing we deliver the more **impactful** it is. When we begin to layer too much, add more to it – that isn’t as impactful.”*

*“We want to be open, but we also have to **protect our brand**. We need innovation and protection.”*

Fidelity: Reinvention and Adaptation

REINVENTION

Purpose: To modify programs for scale up

Who: Decisions made by lead partner with or without other partners

Timing: Prior to scale up; can recur

ADAPTATION

Purpose: To facilitate implementation

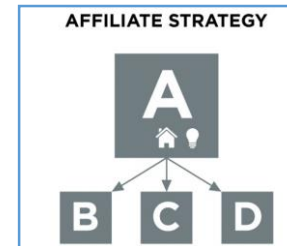
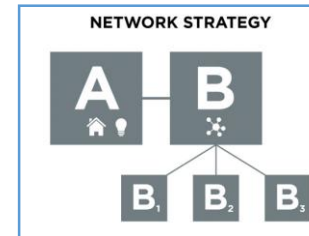
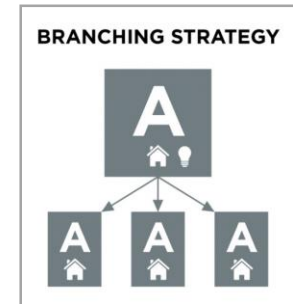
Who: Decisions made by implementers with or without consent from other partners

Timing: During implementation; can recur

REINVENTION

Type of partner involvement in reinvention decisions:

- » Integrative reinvention – Shared decisions where the program and organization changes
- » Interactive reinvention – Informed decisions where the program changes
- » Contractual reinvention – Unilateral decisions by lead partner to change a program



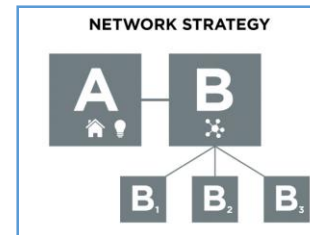
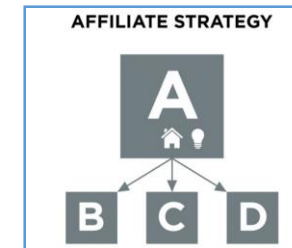
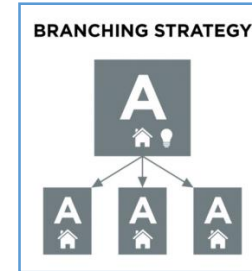
REINVENTION

- A normal part of the development process – though it is seldom systematically recorded, evaluated or studied.
- It is sometimes a minor change – but even a minor change can demonstrably affect chances to reach and benefit more people.
- Includes changes in delivery mode, expanded audiences or beneficiaries, altering the focus – often made to reduce the cost of the program or to increase in advantages to implementers.

ADAPTATION

Types of adaptation decisions:

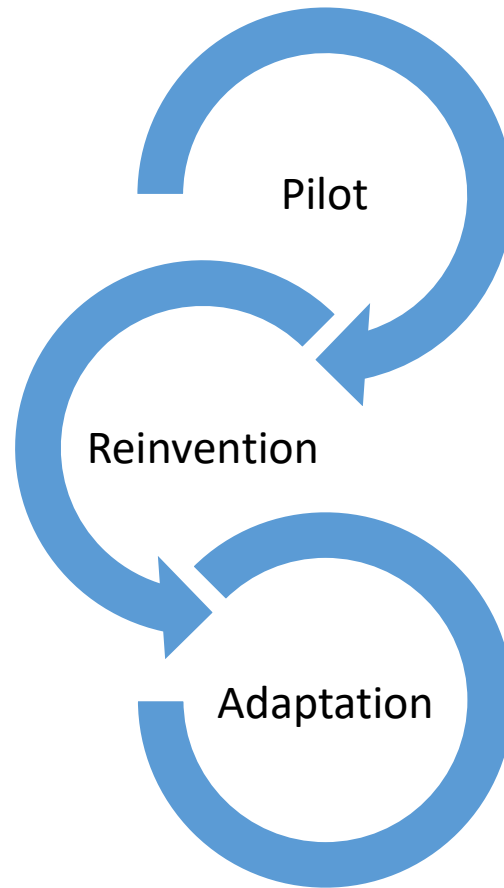
- » Prescriptive fidelity – Adaptation discouraged and implementation closely monitored
- » Expectant fidelity – Adaptation discouraged but implementation loosely monitored
- » Responsive adaptation – Lead partner is sensitive to the need for adaptation by implementers
- » Independent adaptation – Lead partner expects adaptation but only loosely monitors activity



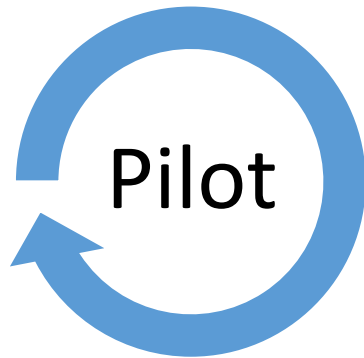
ADAPTATION

- Most lead partners believe adaptation to be required for effective and continued implementation of their program.
- When adaptation was expected or encouraged, sometimes certain components of a program were prescribed while others were only suggested, or could be implemented in one of a number of ways.
- Branching and affiliate programs often used contracts, MOUs, formal agreements, data reporting requirements, dashboards, ongoing evaluations and reviews, required trainings and meetings to monitor and control the implementation process.
- In a distribution network approach, the developer may need to allow others to address issues of implementation fidelity, or rely on training and support materials and YouTube clips of correct delivery to minimize variation in implementation.

Fidelity and Evaluation



Fidelity and Evaluation



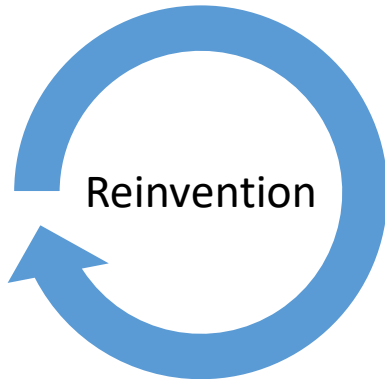
Audience Analysis

Partnership Interests

Innovation Attributes

Capacity Needs

Fidelity and Evaluation



Audience Analysis

Partnership Interests

Innovation Attributes

Capacity Needs

Systematic Tracking of Modifications

Tests for Efficacy

Fidelity and Evaluation

Audience Analysis

Partnership Interests

Innovation Attributes

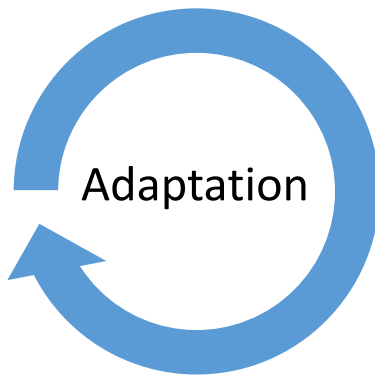
Capacity Needs

Systematic Tracking of Modifications

Tests for Efficacy

Dashboards/Reports

Continuous Reinvention



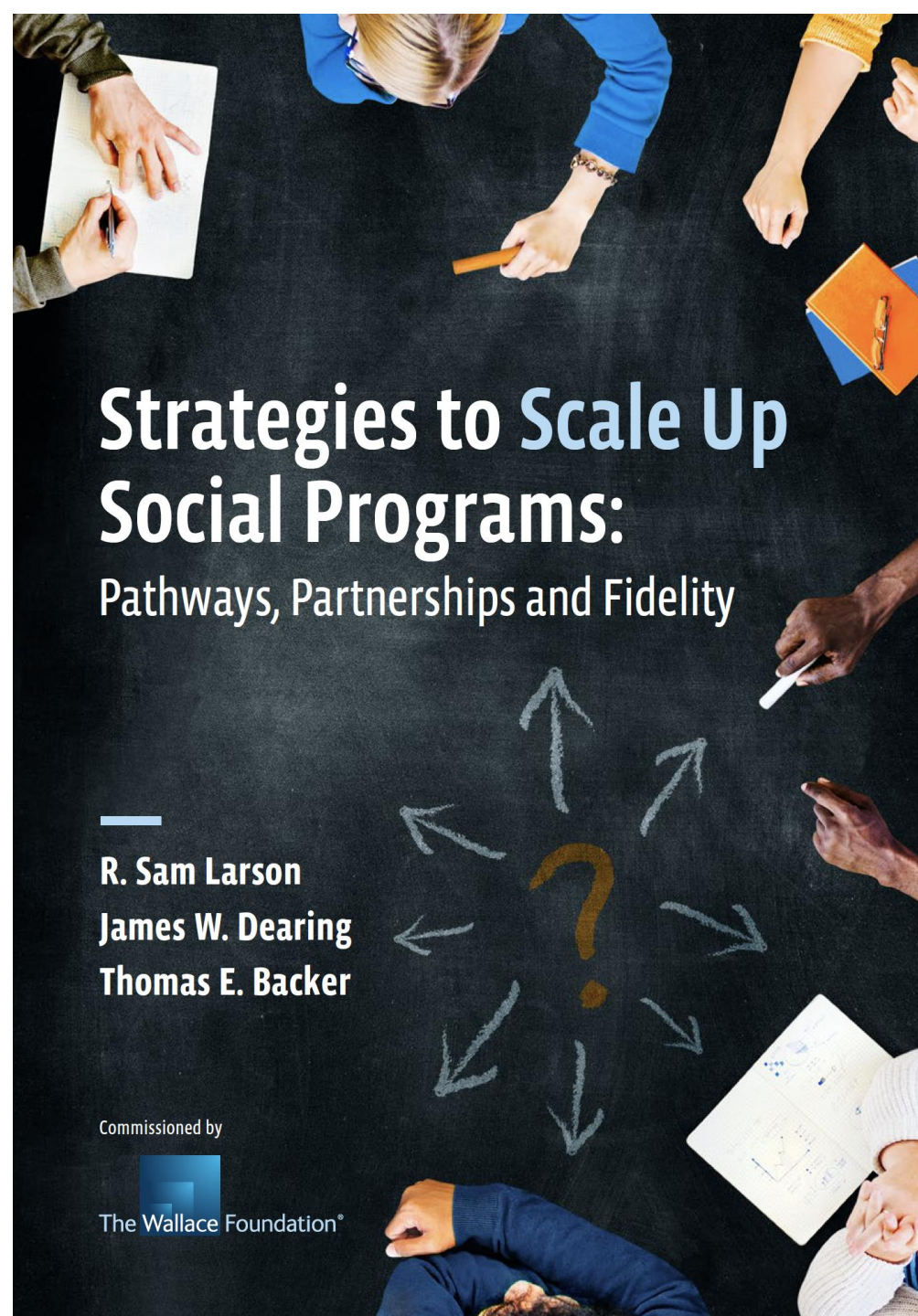
Concluding Remarks: Reinvention and Adaptation

- **Reinvention prior to scale up can be very impactful** -
Diabetes Prevention Program
- **Continuous reinvention can lead to new interventions**
- Playworks
- **You can design for responsible adaptations** - Campus
Kitchens
- **Innovations that require high fidelity are best suited to
a branching strategy or a closely monitored affiliate
strategy** –Posse Scholars, Girls on the Run
- **Network pathways work best for innovations that
invite adaptation by implementers** or a loosely
structured affiliate strategy – Climate Matters

- Study Review
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- Discussion

<https://www.wallacefoundation.org/knowledge-center/Documents/Strategies-to-Scale-Up-Social-Programs.pdf>



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