Scaling What Works:

Evaluation for Reinvention and Adaptation

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Eval Café - WMU
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• Study Review
• Reinvention
• Adaptation
• Implications for Evaluation

Strategies to Scale Up Social Programs: Pathways, Partnerships and Fidelity
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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

PATHWAYS

Key Strategic Decisions for Scaling Up Social Programs

FIDELITY

PARTNERSHIPS
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

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<tr>
<th></th>
<th>Health</th>
<th>Education</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td><strong>Branching Strategy</strong></td>
<td>3</td>
<td>9</td>
<td>12</td>
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<tr>
<td><strong>Affiliate Strategy</strong></td>
<td>9</td>
<td>11</td>
<td>20</td>
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<tr>
<td><strong>Network Strategy</strong></td>
<td>7</td>
<td>6</td>
<td>13</td>
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**TOTALS**

- Health: 12
- Education: 20
- Total: 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

<table>
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<tr>
<th><strong>REINVENTION</strong></th>
<th><strong>ADAPTATION</strong></th>
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<tbody>
<tr>
<td><strong>Purpose:</strong> To modify programs for scale up</td>
<td><strong>Purpose:</strong> To facilitate implementation</td>
</tr>
<tr>
<td><strong>Who:</strong> Decisions made by lead partner with or without other partners</td>
<td><strong>Who:</strong> Decisions made by implementers with or without consent from other partners</td>
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<tr>
<td><strong>Timing:</strong> Prior to scale up; can recur</td>
<td><strong>Timing:</strong> During implementation; can recur</td>
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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
• 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.
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
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

Pilot

Reinvention

Adaptation
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

Reinvention
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
• Reinvention
• Adaptation
• Implications for Evaluation

• Discussion

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