

Strategic Evidence Planning A Practitioner's Perspective

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PROJECT
EVIDENT



The Center for Employment Opportunities (CEO) is a nonprofit organization dedicated to improving the lives of individuals with recent criminal convictions through employment. CEO's structured and tightly supervised program, which offers transitional jobs, job coaching and placement assistance, and work supports, seeks to make participants job-ready, stay employed, and remain free from incarceration. The organization recently partnered with Project Evident to pilot the creation of a Strategic Evidence Plan (SEP) – a multi-year roadmap to accelerate investments and activities for continuous evidence generation and program improvement that are grounded in operational reality and learning agenda of social sector organizations. In this brief, Brad Dudding – CEO's Chief Impact Officer – reflects on the organization's experience with the SEP process.



Brad Dudding

Over the past two decades, my colleagues and I at the [Center for Employment Opportunities \(CEO\)](#) have been on a journey to connect mission to performance. This ongoing pursuit of internal accountability puts our collective good intentions to the test, as we constantly ask ourselves: how well is CEO enriching the lives of the formerly incarcerated persons we serve? In pursuit of answers to this persistent question, we have promoted the complementary interplay of three ways of finding out – performance measurement and monitoring, constituent feedback and external evaluation – all to help more participants succeed, generate net program impact, and replicate our model with quality in new locations.

Now that CEO is solidly on a trajectory to expand our footprint nationwide, we are updating our strategy to measure and maintain effectiveness. To do this, we prototyped a new framework for evidence building with Project Evident, called a Strategic Evidence Plan (SEP). The SEP process (Figure 1) positions social sector practitioners as the driver of their evidence strategy and produces a roadmap to guide investments and activities for continuous program improvement and evidence generation.

Figure 1: Developing a Strategic Evidence Plan

Project Evident designed a staged process that puts practitioners at the driver’s seat, with Project Evident staff providing facilitation, guidance, and expertise to develop a plan and support implementation. A simplified snapshot of the collaborative process is presented below.

EXPLORATION	GOAL IDENTIFICATION	CAPACITY AND CONTEXT REVIEW	PLAN DEVELOPMENT	POST-PLAN SUPPORT
Define scope of work Identify a team of staff at different levels of organization to participate	Review theory of change and other program documents Develop evidence vision and goals	Assess context: evidence base; policy landscape; funder and buyer priorities etc. Assess capacity: staffing learning culture; data and technology etc. Refine goals, if necessary	Identify investments and actions needed to achieve evidence goals Develop recommendations and cost estimates	Project Evident provides partner organization support with implementation and navigation of plan funding, as needed.

CEO recently completed its SEP with the help of Project Evident’s talented team and we are pleased with the outcome. We now have a plan which crystallizes our vision for delivering impact at scale and the specific steps by which to achieve it over a three-year period. I want to share some of the plan’s details, but I also want highlight how our work with Project Evident unearthed some new pathways of staff learning that will be instrumental to achieving our evidence goals.

Surfacing Learning Questions

One learning pathway was reviewing CEO’s theory of change, which lays out the assumptions for how our program works. As part of the goal-setting stage of the SEP, Project Evident convened a theory of change workshop with staff to surface the key questions we need to answer to help participants succeed. The workshop revealed that staff are very interested in understanding new ways of effectively working with sub-populations with differential needs as CEO replicates to additional geographies.

To pursue this line of inquiry, we are planning to predict the likelihood of participant success in our program and then test new service recipes using rapid cycle evaluation to increase engagement (Figure 2). The practice of leveraging observational and experimental data is one of the ways CEO plans to generate rigorous evidence internally for program improvement. Based on the success of the theory of change workshop, we plan to periodically repeat this reflective process with staff to frame new questions and program iterations.



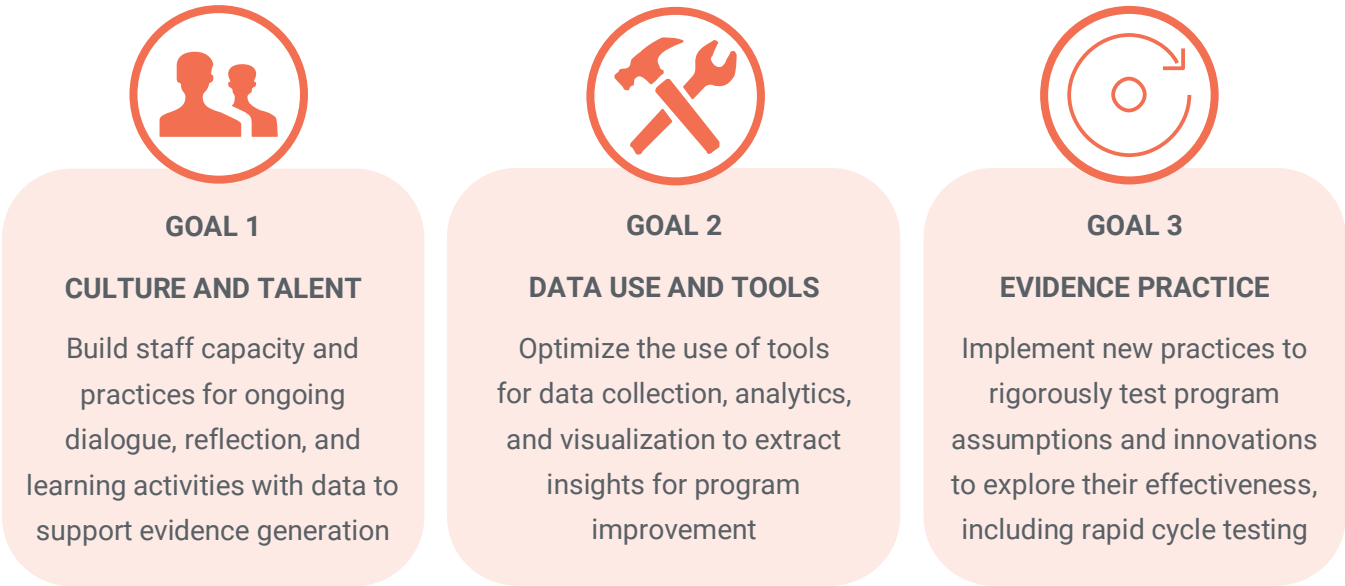
Engaging the Front Line

Another pathway of learning was listening to the perspectives of front-line users of CEO’s measurement system. Using a focus group format, Project Evident met with case managers to get their impressions of how existing systems and practices could be improved and what types of new data and tools would be useful in case managers’ work. What we heard was that staff had a strong appetite to improve how they serve participants but didn’t know how any suggestions they might make would be evaluated or put into practice. Staff also requested that CEO’s database be made more user-friendly, so they could efficiently locate essential information while preparing for and conducting meetings with participants.

We plan to address these issues by investing in our improvement culture and modernizing the interface of our database. In support of these goals we are hiring for a new position called a Learning Ambassador. This role will partner with local program directors and front-line staff to create smart spaces for critical reflection and data analysis to determine what is (and is not) working for participants. The Learning Ambassador will also bridge the gap between the front line and upper management to ensure that CEO’s vision for change is resonating and that the needs of staff are being heard and responded to. Accordingly, we see Learning Ambassadors as instrumental in achieving the SEP vision of fostering a culture of adaptive learning to show meaningful and positive program impacts (Figure 3).

Figure 3 : CEO’s Evidence Vision and Goals

The vision of CEO’s SEP is to fully facilitate and foster a culture of adaptive learning to show meaningful, positive program impacts. The plan is designed to accelerate CEO’s ability to improve outcomes for participants and validate impact.



What’s in it for the Practitioner?

At CEO, we’ve always believed strategy is everyone’s job. In other words, our employees are asked to align their work with our mission and our most important strategic goals. We make a similar request as part of our new evidence strategy. We are asking staff to rely more heavily on data to improve outcomes while embracing new forms of evidence generated by machine learning, improvement science, and rapid cycle experimentation. Fortunately, our SEP anticipates that making these changes will start with

investing in people. This will mean taking the time and energy to teach staff how the plan can enrich more participant lives, but it will also enrich the quality of the work.

In that vein, the SEP offers snapshots on how it will amplify the work of CEO staff to enable better service provision. For example, job developers at our organization currently run multiple reports to match participants to job opportunities. The SEP envisions that, using new tools for data analytics and visualization, job developers will be able to integrate multiple sources of information on one page, thereby allowing them to make faster matches to more suitable, longer-lasting job placements. What's in it for practitioners? How about better long-term outcomes for more participants!

A Journey, Not a Destination

As a veteran of CEO's quest to improve outcomes and demonstrate impact, I now realize that the staircase of evidence is steep and that the ascent will involve some missteps. I know a lot more than I used to about how our model helps participants transition to a stable, productive life, but I've also learned how much I don't know about why some persons remain employed and some return to prison. So, the journey continues for CEO to discover what works and why. Our new evidence strategy provides the clearest path we've had yet for improving how we assist participants on their challenging journey to create a new life. Furthermore, the learning pathways we uncovered with staff while charting this new road trip will help us all enjoy the ride.



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