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A Practitioner Guide for Leading Inclusive and Equity-Infused Rapid-Cycle Learning

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Why did we create this guide?

Equity-infused rapid-cycle learning can help organizations make evidence-informed changes by elevating the voices of staff, families, and community partners. In 2020, Mathematica, a research organization, partnered with Agape Child & Family Services (Agape), an organization that offers two-generation services, to use rapid-cycle learning to enhance two of Agape's initiatives (Exhibit 1). Funded by the Annie E. Casey Foundation, this cross-sector partnership enabled Agape staff, community partners, and families to identify and address program needs in a new way: by using equity-infused rapid-cycle learning. The project is now focused on strengthening Agape's capacity to use this process independently, to address needs equitably across the organization.

Using Mathematica's work with Agape as foundation, we created this guide to help human services providers continuously improve their programs through equitable, collaborative, and innovative approaches. These organizations are filled with experts with deep knowledge of community, family, and organizational needs and how best to address them. This guide aims to tap into and grow this knowledge by offering practitioners the following resources:

1. Key lessons for using rapid-cycle learning in a way that integrates equity principles
2. Practical examples of lessons, based on the REVISE 2G partnership
3. Concrete tools to apply lessons from this guide

Exhibit 1. Agape Child & Family Services

Agape Child & Family Services is a faith-based organization serving children and families experiencing poverty. In 2001, Agape began using a two-generation, place-based model (2Gen) to support families in the Memphis, Tennessee, area. Its 2Gen model includes a range of initiatives designed to help parents, children, and families. About 95 percent of 2Gen participants are people of color.

The Refining Virtual Services to Engage 2Gen Families project (REVISE 2G) focused on two of Agape's initiatives:[1]

- **Stars** is a school-based initiative to improve students' attendance and behavior. It also focuses on increasing parents' participation and interest in students' achievement.
- **TeamWorks** connects adults to employment and education resources to help them achieve their goals.

This guide outlines tips and suggestions for conducting improvement work in an equitable and inclusive way, but it does not present detailed steps for conducting rapid-cycle learning. Practitioners or organizations that are new to rapid-cycle learning may want to explore resources in Box 1, which provide more extensive information about how to conduct rapid-cycle learning and concrete examples of what improvement work can look like in practice.

What is rapid-cycle learning?

For this guide, we describe rapid-cycle learning as a method for quickly testing strategies to strengthen programs or services. The process typically involves critical, upfront steps to break down and study opportunity areas and co-create focused solutions with people most affected by the program or opportunity. There are different definitions of rapid-cycle learning, but this guide includes the following components in the process:

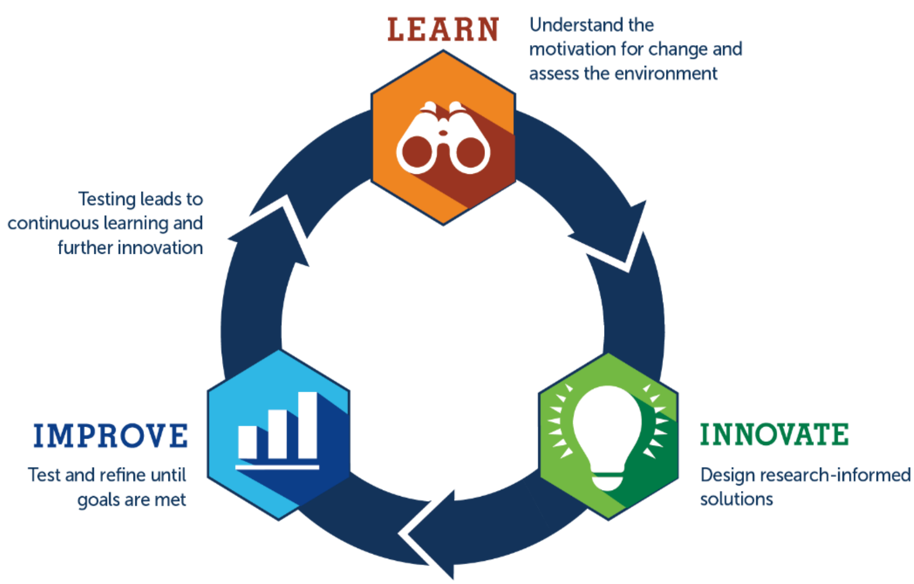
[1] REVISE 2G aimed to strengthen how Stars and TeamWorks staff provided services and supported families. The project did not examine program or participant outcomes.

1. Identifying and learning about program challenges
2. Developing and testing a strategy in a low-stakes, small-scale way
3. Collecting information to examine how the strategy is working
4. Improving the strategy before scaling at the program or agency level

By taking the time to refine strategies and pilot them on a small scale, organizations can promote buy-in for change and reduce the fatigue that can come from rolling out a change without first understanding how it might work.

Practitioners can draw on a range of frameworks to conduct rapid-cycle learning. For the REVISE 2G partnership, we used the Learn, Innovate, Improve (LI^2) framework (Derr et al. 2017; Exhibit 2). LI^2 includes three phases: (1) identifying a challenge (Learn), (2) developing a research-informed solution (Innovate), and (3) testing and refining the solution in an innovative way (Improve). LI^2 is evidence-informed approach that is based on research from implementation science, human-centered design, and other improvement frameworks (Derr 2022). Other models, such as Plan-Do-Study-Act (Tribal Evaluation Institute 2016) and Getting to Outcomes (Chinman et al. 2004), use iterative testing to refine solutions to specific implementation challenges. Studies have shown that using an inclusive, continuous improvement approach may help organizations build critical buy-in for implementing change, promote a learning culture, and allow staff to feel more ownership over improvement processes (Sharrock 2018; Tichnor-Wagner et al. 2017).

Exhibit 2. Learn, Innovate, Improve framework for evidence-informed change



Source: Derr et al. 2017

Box 1. What does rapid-cycle learning look like in practice?

Practitioners have access to diverse resources focused on how to conduct rapid-cycle learning. The following list provides a starting point for understanding how to plan for and conduct your own rapid-cycle learning process and what these improvement efforts can look like on the ground.

Learn, Innovate, Improve: A Practice Guide for Enhancing Programs and Improving Lives (Derr 2022). This practice guide provides comprehensive information about the LI^2 process, including its foundations. It describes each phase, including its goals, a sense of what implementing the phase looks like in practice, and the results that come out of the phase. The guide includes templates for products associated with different phases. Practitioners can use the guide independently or with external partners, such as research agencies.

Learn, Innovate, Improve (LI^2): Enhancing Programs and Improving Lives (Derr et al. 2017). This brief walks through the stages of the LI^2 process and describes how LI^2 is different from other improvement processes. The brief includes tips and practical strategies for engaging with each step.

The Learn Phase: Creating Sustainable Change in Human Services Programs (McCay et al. 2019). This practice brief describes approaches for identifying and learning about programmatic challenges and understanding the environment in which change will take place.

The Innovate Phase: Co-creating Evidence-informed Solutions to Improve Human Services Programs (Derr et al. 2019). This practice brief explains steps for brainstorming, conceptualizing, and planning strategies to address programmatic challenges. This phase builds on the previous learning stage by bringing partners together to collectively design solutions for the identified problem.

Learning to Adapt: Helping Agape Child & Family Services Use Rapid-Cycle Learning to Drive Equitable Change (Shenbanjo et al. 2022). This report summarizes the first phase of the REVISE 2G project. It describes how Mathematica and Agape conducted rapid-cycle learning through LI^2, highlighting key successes, opportunities, and lessons that emerged from the work. The report includes recommendations for enhancing two-generation initiatives using rapid-cycle learning.

Using a "Road Test" to Improve Human Services Programs (McCay et al. 2017). This practice brief discusses using road tests, one method for rapid-cycle learning, to learn about improvement strategies by testing them on a small scale before making permanent or widespread changes.

Understanding Rapid Learning Methods: Frequently Asked Questions and Recommended Resources (Holzwart et al. 2019). This guide provides access to resources that describe rapid-cycle methods, including when and how to conduct them.

Is equity-infused rapid-cycle learning right for my organization?

The following factors might make rapid-cycle learning a good fit for your organization:

- You want to develop creative solutions or strategies to improve your program.
- There is an emerging challenge.
- You have a genuine interest in incorporating voices of those affected by your program to resolve the challenge.
- There is an opportunity to test an existing, evidence-based practice.
- Your organization wants to strengthen program implementation before an evaluation.
- Your organization wants to understand what influences successful implementation.
- Your organization wants to develop evidence on a shorter timeline than a traditional evaluation affords.

Before beginning rapid-cycle learning, consider how your organization can ensure a strong foundation for equity-infused change. The next section provides guidance for this critical step, which will help your organization effectively identify program opportunities (Phase 1), co-create strategies to address opportunities (Phase 2), and refine the strategies (Phase 3).

Preliminary work: Set the foundation for equity-infused rapid-cycle learning

Involving program participants and staff at all levels of your organization at the beginning of a rapid-cycle learning effort gives them an opportunity to shape all aspects of the work (Skelton-Wilson et al. 2021). It can also be helpful to engage community partners that support your organization's mission.

Once you determine whom you want to engage, consider how to engage them. It is important that co-creators feel their participation is meaningful and substantive because this feeling fosters trust that their voices matter and are helping shape your agency's changes. For example, using feedback surveys to gather input at multiple points during rapid-cycle learning is beneficial, but it could be considered tokenism if an agency never implements the suggestions. This section includes considerations for ensuring full participation in a rapid-cycle learning effort before it begins.

Form a diverse advisory group to plan and guide the improvement effort. Engage staff, program partners, and families from the beginning (Exhibit 3). Involve them in developing learning questions, goals, and plans for rapid-cycle learning, including levels of involvement. When considering who would be a good fit for the advisory group, engage participants and staff who are focused on improvement and open to providing constructive criticism. Ease with data is less important.

Exhibit 3. Reflections in practice from REVISE 2G: Partnering with an advisory group

The REVISE 2G project engaged a work group early on to help refine learning questions. This group had 22 members associated with Stars and TeamWorks, the focal initiatives for the effort. They included directors, supervisors, coordinators, Connectors (frontline staff), community partners, and program participants. Stars and TeamWorks leadership helped identify work group members, using guidance that the research team provided. Leadership members' contextual knowledge and programmatic expertise helped ensure the work group included the right mix of collaborators.

Clearly communicate the advisory group's goals, expectations, and norms. Early conversations with the advisory group should focus on ensuring the group agrees on its goal for change and has a common understanding of improvement objectives. For example, in REVISE 2G, the partnership focused on helping Stars and TeamWorks improve programming in the context of the COVID-19 pandemic. Collaborative conversations can help the group agree on roles, and members can partner to develop commitments to guide the work (Exhibit 4). It can be helpful to document and refer to these commitments, roles, and goals throughout the effort, such as at the beginning of meetings. Because an improvement effort is rarely linear, the document would be updated over time.

Exhibit 4. Reflections in practice from REVISE 2G: Developing group commitments

For the REVISE 2G partnership, the work group and research team developed the following commitments to guide rapid-cycle learning:

1. **Inclusivity**—Ensure all participants have a voice and feel comfortable sharing it; use language that is accessible to all.
2. **Creativity**—Encourage creative solutions and innovative ideas; allow for constructive silence; use open-ended questions that promote discussion.
3. **Respect**—Recognize that it's okay to disagree; be open-minded, supportive, empathetic, and patient; assume positive intent.
4. **Humility**—Ask questions when you are unsure; be open to constructive feedback; take ownership of mistakes.
5. **Engagement**—Be engaged, focused, team-oriented, and transparent; make task lists that clearly outline how to meet goals.

Learning Forward, an organization focused on professional learning, has information that your group can consider when completing this process, including sample norms.

Ensure the advisory group understands the components of equity-infused, rapid-cycle work. When engaging community partners or program families, keep in mind their diverse knowledge and expertise, which might not include rapid-cycle learning or evidence-based equity principles. It might be helpful to review information about rapid-cycle learning and equity

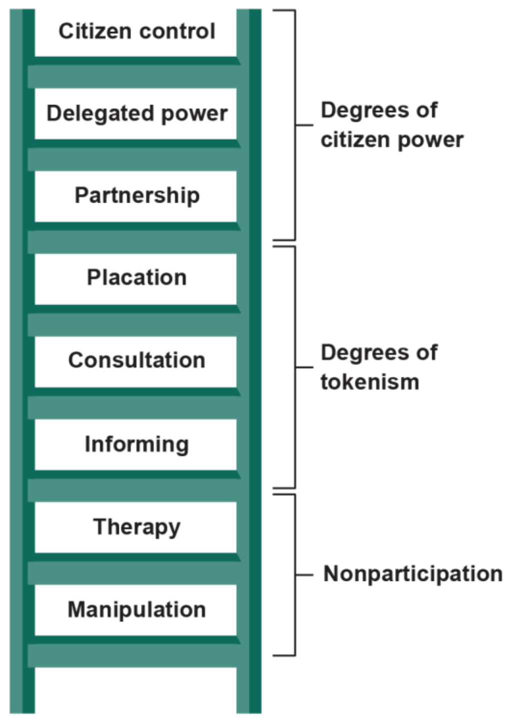
We give [staff] the tools and help they need to do their job… Equity doesn't mean that I let particular staff do things that aren't in their wheelhouse. It doesn't just mean I hand something to [a staff member] and say, "Get it done."

Agape leadership member

in research and community support. Understanding of these components can help group members feel more able to contribute their insights (Exhibit 5). Consider circulating reading material to build the group's background knowledge or lead a "taking the temperature" activity that enables group members to learn and discuss concepts.

Exhibit 5. What does equitable involvement look like?

Sherry Arnstein's (1969) Ladder of Citizen Participation is a useful framework for assessing whether and how your team is meaningfully integrating the voices of those involved with your program. It describes tiers of involvement, with the rungs near the top of the ladder representing more equitable collaboration and authentic participation from people most affected by your program. The following descriptions explain the tiers and their corresponding categories of citizen participation.



1. **Nonparticipation.** Rungs in this tier include *manipulation* and *therapy*. When *manipulation* takes place, an organization gives the illusion of a participatory process while not actually sharing power. *Therapy* assumes those in charge know what is best for the people a program affects.
2. **Tokenism.** These rungs include *informing*, *consultation*, and *placation*. Human services agencies commonly use *consultation*, often by collecting feedback from families, such as through surveys. This can be a strong practice for gathering participants' feedback, but it can be harmful if the agency does not have a plan for using that feedback.
3. **Citizen power.** This tier captures *partnership*, *delegated power*, and *citizen control*. These approaches are all positive examples of power sharing that can be appropriate in different circumstances. Power sharing can involve sharing authority over decision making or ensuring everyone involved in a change effort has equal opportunity to contribute to an agenda. *Citizen control*, the highest rung, involves program leaders giving power to those affected by the program. In improvement work, this might involve frontline staff or participants independently leading group meetings and taking on decision-making responsibilities.

Although organizations can generally interpret that higher levels on Arnstein's ladder reflect more equitable practices, context matters. For instance, not all participants will have the time or capacity to participate in a way that reflects *citizen power*, but they might be available to *consult* by using feedback surveys to offer insights into challenges and suggestions for improvement. In some circumstances, decision-making power is difficult to share. For example, for some staffing challenges, leadership might need to be the final voice. When considering your program context, be upfront about who has decision-making authority to avoid confusion or perceptions of inauthenticity.

Sources: Arnstein 1969; Collins and Ison 2009.

Practice proactive communication. Intentionally strive to reduce barriers to participating in the advisory group; all members should have equal opportunity to contribute their insights and expertise. To support participation, plan to use multiple methods of communication to keep everyone updated. For example, recognize that staff members might prefer emails, but program participants might prefer text or phone communication. Ask each group member about their preferred communication method and honor their preferences as much as possible. It can also be helpful to poll the group initially to determine the best meeting times. Meetings during work hours might not work with families' schedules (Skelton-Wilson et al. 2021).

Acknowledge and address power imbalances. Just as logistical factors can influence participation in the advisory group, so can social factors influenced by power dynamics (Cargo and Mercer 2008; Metz et al. 2021). Practitioners involved in rapid-cycle learning should work to create an environment that values all voices and wisdom. The following strategies can help with this goal:

> *[Equity requires a] constant reiteration of equality of voice. That everybody gets an equal vote. That everybody's pros, cons, and support are weighed equally.*
>
> Agape leadership member

1. **Set expectations with leadership in advance.** Be clear about participation and decision making, especially with those in leadership positions. Establishing norms can help with setting expectations, but actively referring back to the norms will ensure the group follows them.
2. **Take time to build relationships**. If your advisory group mostly includes staff who know each other well, you have an immediate advantage. However, an advisory group should bring new voices to the table. Relationship building can help program participants, partners in your group, and staff who do not collaborate regularly feel comfortable with each other. The process should be intentional and authentic, but it does not have to be time intensive. For example, consider starting each meeting with an icebreaker.
3. **Use structured activities to promote participation**. Emphasize the importance of gathering and internalizing everyone's perspectives. Consider human-centered design activities that amplify diverse voices and promote a safe space for participation (Exhibit 6). These activities prioritize designing for and with people who will use a solution (Rosinsky et al. 2022), and they will be useful in other phases of rapid-cycle learning, as described in upcoming sections of this guide.
4. **Periodically assess group dynamics.** Check in regularly with all group members, particularly quieter members. Be prepared to adjust group or meeting processes based on their feedback (Centers for Disease Control and Prevention 2014).

Exhibit 6. Using human-centered design to partner for improvement

Human-centered design empowers a range of people, such as program staff, partners, and participants, to get involved in innovation. Therefore, it often yields effective strategies that are more feasible for staff to implement. Several human-centered design activities are useful for rapid-cycle learning:

1. Identify program challenges with "Rose, Thorn, Bud," or "What's on Your Radar?" activities.
2. Break down a challenge using a problem-tree analysis.
3. Develop strategies to test with a creative matrix.
4. Prioritize challenges and strategies using a bullseye diagram or an importance/difficulty matrix.
5. Implement a strategy by developing a concept poster.

For more information about human-centered design activities, visit the Luma Institute or Design Kit websites.

Compensate program participants for their contributions. When staff members contribute to an improvement effort, they are doing so on work time, but program participants are not (Skelton-Wilson et al. 2021). To demonstrate that participants' time, knowledge, and expertise are valuable, organizations should plan to pay participants for engaging in rapid-cycle learning activities; this is also an equity practice. Talk with your participants about what type of payment is best for them. In REVISE 2G, the research team provided gift cards for participation in three work group meetings and for all data collection opportunities that engaged program participants. If providing gift cards, prioritize flexible spending, such as with Visa or Mastercard gift cards. Ask participants for other supports they might need to meaningfully engage in the activities, such as transportation, child care, or meals.

> *[Rapid-cycle learning] allowed a problem to be addressed without it being [seen as] a problem.*
>
> Agape staff member

Promote a culture of learning and innovation. Rapid-cycle learning involves quick and continuous iteration. Often, organizations need to make several changes before their tested strategies have the desired effect. This trial and error can feel uncomfortable, so it is helpful for organizations to promote and sustain cultures that prioritize learning and reframe failures as opportunities to learn, in service of growth (Exhibit 7).

Exhibit 7. What does a learning culture look like?

1. Supervisors and other managerial staff encourage employees to discuss challenges.
2. Reactions to mistakes are not negative or punitive, because mistakes are framed as learning opportunities.
3. Employees feel comfortable asking questions and seeking clarification.
4. Teams provide and receive feedback regularly.
5. Formal learning opportunities, such as lunch-and-learns or communities of practice, take place.
6. Organizations prioritize collecting, analyzing, and openly discussing data to support decision making.

Sources: Trovas 2022; Winkler and Fyffe 2016.

Reflect on opportunities to enhance cultural responsiveness among people who work with families. Program leaders and staff have a responsibility to increase their knowledge of and appreciation for the culture of the families they support (Askew and Jay 2012). As needed, staff and leaders might benefit from cultural responsiveness training to increase awareness of their personal biases and develop an understanding of how to support inclusive learning (Elam and Walker 2021). Self-reflection questions can help individuals understand their biases, shedding light on potential growth areas.

You can say you're inclusive and equitable, but if the practices aren't demonstrated from the very top of the agency straight to the community, it hampers the work. It's not just the community voices that need to be raised up; there needs to be a level of inclusivity and equity demonstrated among the team, because that's how you start building the culture from the inside out.

Agape leadership member

Phase 1. Understand your program's opportunities

When setting a foundation for rapid-cycle learning, your organization will establish a "North Star" that serves as a goal for change. The first phase of an improvement effort focus on understanding challenges preventing progress toward this goal. In this phase, you will also explore your organization's readiness for change. The following considerations can help ensure your organization's learning is grounded in equitable approaches.

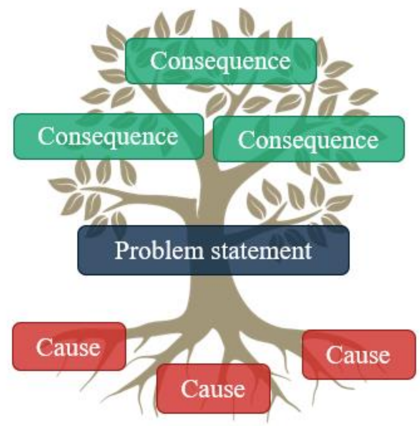
Identify and prioritize emerging challenges with program staff, participants, and partners. Practitioners, families, and community partners have different perspectives about the challenges programs face and how programs can grow. For example, staff who work directly with families have insights that executive leaders might lack, because their daily experiences are different. To ensure testing and innovation address the right opportunities, a mixed group of staff, participants, and partners should collaborate. Engage the advisory group to identify potential growth areas. Several human-centered design activities can help you identify priorities, needs, and opportunities.

Understand key drivers of challenges. Understanding root causes can provide clarity about the context affecting challenges and reveal how different factors are working together to create a single challenge (The Annie E. Casey Foundation 2015). Explore human-centered design activities that can help your organization identify challenges and their root causes. Exhibit 8 highlights the problem-tree analysis activity, but your organization can use other methods to identify root causes. For example, consider using "the five whys" to repeatedly ask and understand why a problem is happening. Collect administrative data and host a "data party," where staff, participants, and partners can gather to break down the numbers and identify patterns for different groups, such as by participant and staff demographics like race and ethnicity, age, language, and gender, and for different characteristics within the community, such as neighborhood, school, and employer (The Annie E. Casey Foundation 2015). It can take more than one meeting to identify a focal opportunity and clarify its root causes. Detailed discussions are helpful because this step sets the foundation for innovation. Importantly, understanding key drivers can help your organization use asset-centered thinking that places responsibility for change on your collective organization and the processes you use, rather than seeing the people you serve as responsible for emerging challenges (Ramos et al. 2021).

Exhibit 8. Using the problem-tree analysis activity to understand the causes and consequences of a challenge

A *problem tree* can help your organization understand the root causes and consequences of a program challenge. The activity requires a template: a tree diagram with roots, a trunk, limbs, and branches. Your team will work together on the following steps:

1. **Develop a problem statement.** The problem statement describes the topic your team has chosen to tackle.
2. **Brainstorm causes of the problem.** Your team will brainstorm distinct causes of the problem. Most challenges are multifaceted, so your group should feel empowered to push past its initial idea about what is causing the problem to uncover deeper factors.
3. **Think about the consequences of your prioritized challenge.** Your team should consider what might happen if your chosen problem is not addressed. Other human-centered design activities can help you brainstorm consequences. For example, *stakeholder mapping* will enable your team to document people the challenge affects directly or organizations that can make decisions to help address the challenge.



Your team can use the problem tree to document your understanding of the chosen challenge, but pay attention to what you might still need to learn about the problem. Often, you need to bring additional voices into the conversation to better understand the issue.

Source: Luma Institute.

Collect qualitative data to clarify challenges and bring additional voices into the conversation. After exploring key drivers of challenges, it can be helpful to use interviews or focus groups to develop a clearer picture of your program's needs (Derr et al. 2017; Exhibit 9). This information can help you understand the details and nuance of your challenge but from firsthand perspectives that give a more people-centered and human element to the data you are gathering.

Exhibit 9. Reflections in practice from REVISE 2G: Understanding root causes

The REVISE 2G work group led brainstorming sessions of the challenges that Stars and TeamWorks were confronting and root causes of the challenges. To support brainstorming, the research team hosted human-centered design activities for the staff members, program leaders, participants, and community partners in the work group. After the work group made a list of the most pressing priority challenges, the research team continued learning about challenges by conducting follow-up interviews with staff members and program participants. These additional conversations helped deepen the team's understanding of the opportunities and root causes that the work group prioritized. The team was then able to refine the focal opportunities that would guide upcoming testing.

Phase 2. Co-create strategies

Co-creation empowers staff, clients, and community partners to brainstorm improvements, and it can lead to more promising ideas (Nicholas et al. 2019). This section includes suggestions for nurturing co-creative innovation.

To begin, center equitable change and outcomes when designing improvement strategies. Improvement strategies are an opportunity to enhance programming, but you should design them to create more equitable outcomes across families. To avoid increasing inequities, make sure you have assessed root causes in detail and collected and broken down data before you start innovating. This will help you understand how people are experiencing your program and what you can do to ensure your innovation goals give each group what it needs. When you start brainstorming strategies, the goal is to pilot changes that will not lead to worse outcomes for any group. Prioritize strategies that will do the most good for all, because improving outcomes at the program level is not a sufficient win if the strategy might widen gaps between families. This is another equity practice.

Create a safe space for brainstorming that directly acknowledges power imbalances. Co-creating strategies with staff members, clients, and community partners requires trust. Trust helps people feel confident (1) they can safely critique a program without consequences, (2) their ideas will be considered, and (3) their expertise and feedback matter (Skelton-Wilson et al. 2021). To help people feel their ideas matter, it is important to recognize the power dynamics that guide traditional decision making in your organization and restructure them (The Annie E. Casey Foundation 2015; Stern et al. 2019). For example, discuss who is typically last to weigh in on innovation or who might typically be engaged in a way that is tokenizing, such as by consulting over predetermined ideas, rather than directly contributing to brainstorming from the start. Reverse these practices to help non-leadership staff have the loudest voices in the room. The first section of this guide, "Preliminary work: Set the foundation for equity-infused rapid-cycle learning," and Exhibit 10 include additional considerations for fostering a safe space among collaborators. Human-centered design activities can be another helpful approach to gather ideas in a structured, inclusive way.

Exhibit 10. Suggestions for generating ideas

1. Be clear about how you plan to use the information.
2. Frame the feedback as an ongoing conversation, rather than data collection, to emphasize mutual learning.
3. Collect information anonymously, such as through an anonymous feedback survey or an asynchronous sticky board that enables staff, participants, or partners to suggest ideas for improvement.
4. After collecting ideas, share updates about next steps to show you are listening and implementing suggestions.

Source: Dudding and Walter 2018.

When developing strategies, give weight to community-based expertise. Rapid-cycle learning aims to yield high-quality solutions to your prioritized challenges. To make sure your solutions are high quality, your organization can lean on evidence from research, such as by testing formal evidence-based practices. This approach can help ensure solutions have the desired effects. At the same time, practitioners should not neglect the knowledge of staff members, community partners, and families (Cox et al. 2009). These experts

> *[Rapid-cycle learning] involved cross-collaboration between Connectors … you find solutions a lot quicker [that way].*
>
> Agape staff member

have a deep and naturally evolving understanding of programs' context and solutions that might enhance, support, or reinforce community strengths. As appropriate, when shaping your solutions, integrate this community expertise with knowledge you gather from traditional research. As described above, elevating community voice is an equity practice.

If you test evidence-based practices, make sure co-creators have time to adapt them. Not all strategies emerge from the bottom up; in some cases, an off-the-shelf, research-informed intervention from the field might be an appropriate idea to test. In this case, ensure that staff, participants, and community members have the power and time to inform adaptations or implementation strategies (Loper et al. 2021). In rapid-cycle learning, the testing phase allows people affected by your program to provide feedback on how a strategy is or is not working. Before this takes place, the "how" of a strategy must be made clear. People who will lead or support implementation and testing should therefore have input about the strategy itself. For a complex strategy or change, allow time for user testing, so implementers can give feedback and shape the strategy. In REVISE 2G, some of the TeamWorks staff said they did not feel much ownership over their chosen strategy to use a research-informed tool. Staff said they did not have the context or familiarity with the tool to offer substantive suggestions for adapting it for TeamWorks' needs. Program leaders shared that giving staff time to test the existing tool with one or two participants could have helped inform adaptations. When co-creating, develop timelines that leave room for inclusive creation and brainstorming. This can help promote ownership and buy-in among people who will test the strategy.

Phase 3. Refine the strategies and reflect on progress

Rapid-cycle learning will enable you to test your strategy iteratively. You will try out solutions on a small scale, such as with a few staff members or in support of a small number of families. You will then engage diverse voices to collect and analyze data about how the strategy worked. Based on the results, you will co-create improvements for the strategy and continue this iterative process (Derr et al. 2017). This section provides considerations for making refinements inclusively.

Designate champions for change to drive refinements and continued testing. Your advisory group can help set a strong foundation for rapid-cycle learning and identify a priority challenge, its root causes, and consequences. The advisory group can also help determine solutions to test. To support testing, it can be useful to identify individuals to champion iteration, because this intensive work benefits from dedicated time and attention. For example, consider creating an implementation team that operates separately from the advisory group. This team can be helpful for (1) overseeing and attending to key tasks and (2) engaging additional perspectives to support improvement (Frank Porter Graham Child Development Institute n.d.). For the REVISE 2G project, separate Stars and TeamWorks implementation teams helped design and monitor the strategies each program tested. Each team included staff at multiple levels, such as frontline staff, supervisors, and directors. If your strategy primarily involves changes that staff will make, an implementation team can also help promote buy-in, because team members can function as champions for change and ensure everyone understands roles and expectations.

Make necessary adjustments to workloads for staff involved in testing. When designating your champions for change or forming an implementation team, be mindful that testing is an additional responsibility for staff. In general, when inviting staff, participants, and community partners to the implementation team, be clear about their estimated time commitment (Equitable Access Support Network 2017). Clear communication about potential roles and responsibilities is also helpful. Testing requires staff to achieve a unique balance: implementing a new strategy while maintaining a practice that has not yet been replaced. Testing also includes data collection activities that can further stretch staff. Organizational leaders and supervisors can determine the best way to help staff feel supported, balanced, and able to test confidently and successfully. For example, supervisors might consider whether staff can offload or temporarily de-prioritize certain activities while testing takes place.

Collect data that capture diverse perspectives from people involved with your program. After your learning cycles, you will use different methods to examine how approaches worked. For example, you might administer surveys, observe practices, collect administrative data, or conduct interviews and focus groups (Derr 2022). The data collection approach you choose will depend on the information you need to understand how testing worked, but be sure your methods prioritize feedback from the people that change will affect. When designing your data collection strategy, try to use approaches that are inclusive but low burden, especially for people already balancing multiple demands (Peck 2021). For example, to collect data from participants, empower staff to lead human-centered design activities during their standing meetings with these participants rather than setting up a separate time for discussion.

Exhibit 11. Learning questions to guide data collection

1. How did we implement the strategies?
2. What influenced successes and roadblocks?
3. How did strategies complement or disrupt existing program processes and components?
4. What do staff and families think about strategies?
5. What outcomes or changes took place, and how do they vary for different people or in different contexts?
6. To what extent did we implement the strategy as intended?

Source: Derr et al. 2017.

Analyze data to clarify how strategies worked for different people. Data analysis will enable you to understand several questions (Exhibit 11), with a primary focus on assessing whether your strategy led to desired results. Similar to the data party approach, look beyond the overall trends and see how solutions worked for people with different demographic characteristics, such as by race, ethnicity, age, language, or gender; in different contexts; and with different needs (The Annie E. Casey Foundation 2015). For example, imagine you were testing a goal-setting and monitoring tool, similar to the strategy that TeamWorks implemented. When analyzing data, you might explore how the tool worked for participants at different stages of goal achievement, or for participants with different needs (for example, participants who live in households with two parents, or participants who have help with child care). What to examine will vary based on your organization, your community, and the people you serve.

Partner with people who are affected by your program when analyzing data, particularly to help contextualize results. Organizations often rely on their leaders or a data and quality improvement team to interpret information and plan next steps. Although this approach can streamline analyses and decision making, it leaves out important perspectives from people with firsthand knowledge of program experiences and processes. Bringing additional voices to the table can be helpful for assessing how strategies worked, for whom, and in what contexts (Exhibit 12). Be intentional about engaging frontline staff, community partners, and families during the analysis phase, because these experts can ground results in the community, program, and organizational context. This contextualization can help ensure the refinement process is based on more accurate and meaningful interpretations of results and is another equity practice (Frierson et al. 2010; Stern et al. 2019).

Exhibit 12. Reflections in practice from REVISE 2G: Collaborating to analyze data

To understand how staff members and program participants felt about the strategies that Stars and TeamWorks tested, the research team used different data collection approaches. Interviews with participants and staff members focused on program experiences during and after testing, including opportunities to improve the Stars and TeamWorks initiatives. Conversations with staff members helped clarify challenges associated with supporting families during the pandemic and staff's feelings about the tested strategies, including successes, opportunities, and possible next steps. The research team also surveyed staff members to better understand how they implemented and experienced the strategies.

After collecting data, the research team partnered with Stars and TeamWorks staff to interpret results. Engaging these experts helped clarify the stories the data were telling and inform next steps. For example, during testing, TeamWorks piloted a client-driven, goal-setting tool. After data collection, the research team led a data debriefing with TeamWorks staff. During the debriefing, Connectors said the tool helped employed participants select their priority goals but was less helpful for participants who were starting or continuing their job searches, because they found the tool overwhelming. With these insights, the team brainstormed ways to discuss the tool differently and considered additional goal-setting resources to make the tool more useful.

Looking ahead: Next steps for sustaining equitable change

During and after testing, provide formal opportunities to build capacity for equity-infused rapid-cycle learning, and continually reflect on progress. As your organization tests and refines strategies for change, the staff, community partners, and participants who support testing will gain skills with rapid-cycle learning. To deepen this knowledge, assess and implement opportunities for formal learning and capacity building, including trainings or lunch-and-learns. For example, it might be beneficial to gather and share resources about a specific data collection method and set up a brown bag to discuss how to implement this approach and use equity-centered practices. Supplement these learning opportunities with discussions about how staff, participants, and community partners are feeling about rapid-cycle learning itself. The following questions can be a starting point for reflection:

- How are group members feeling about their capacity to contribute to the change process? Do they want to be more or less involved?
- What new voices should you bring into the conversation?
- How do people feel about how data are being collected and used?
- What additional training or capacity building should take place to enhance co-creators' understanding of equity-infused rapid-cycle learning?
- Has rapid-cycle learning remained faithful to the group's commitment to equity and inclusion?

These considerations can help your organization enact equitable change in a growth-focused space. Both safety to fail forward and capacity building in service of learning can lead to short-term innovation that nurtures long-term change and professional growth.

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