



THINGS to CONSIDER

How to Design a Successful Pilot



When vocational rehabilitation (VR) agencies roll out a new service, they may make it available to clients statewide. But what if you could first learn how likely a new service was to work at your office, in your region, or in your unique setting before you rolled it out at scale? Here are some things to think about to help you get the data needed to make evidence-based decisions.

| | | Service | |
|----------|--------------|-----------|-------------|
| | | Effective | Ineffective |
| Decision | Adopt | ✓ | ✗ |
| | Do not adopt | ✗ | ✓ |

To increase the likelihood of getting results you can trust...

Use randomization when possible

Include more participants

Randomize at the lowest possible level

Take advantage of pre-intervention data

Think carefully about what will define success

.....
 A well-designed pilot will provide data to help you determine which effective services to adopt and which ineffective services not to adopt.

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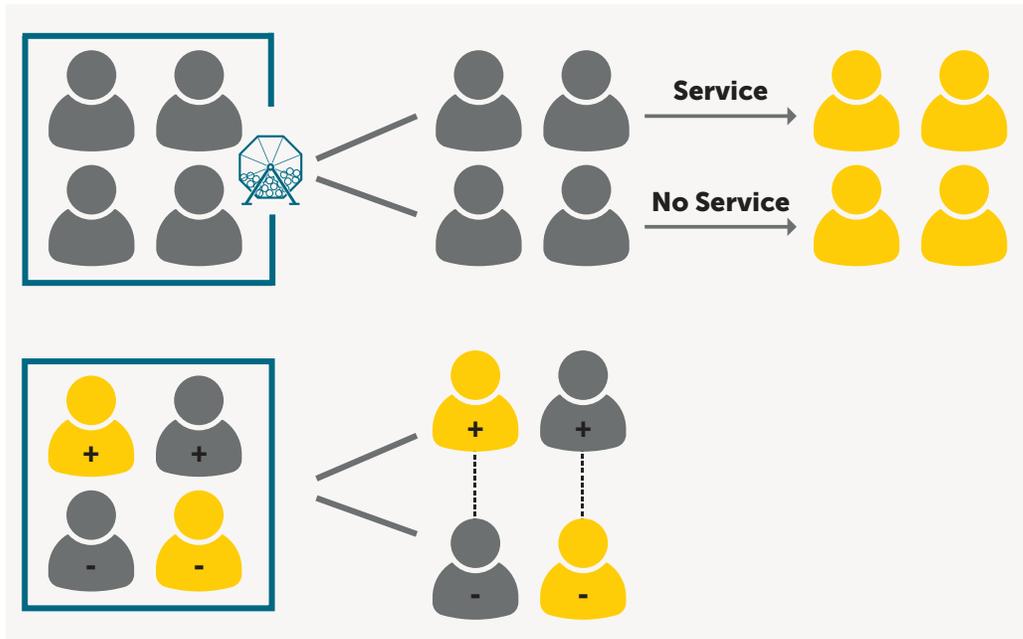
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Considerations when planning a pilot: Randomization

To be confident that the difference in outcomes between recipients and nonrecipients is caused only by the service—not by any other factors—you must make sure that your recipients and nonrecipients are similar in every way except for their receipt of the service.



Service's impact =



By randomly assigning who gets access to the service, recipients and nonrecipients will be similar on both observed characteristics (such as type of impairment) and unobserved characteristics (such as motivation).

If you can't randomly assign who gets access to the service, you might be able to use a method called matched comparison. With this method, you use

background data to find nonrecipients who are similar to your recipients. Your groups will then be similar on observed characteristics, but they may differ on unobserved characteristics.

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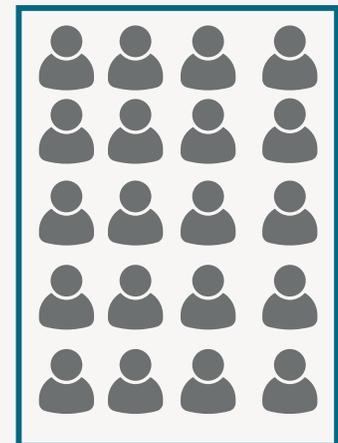
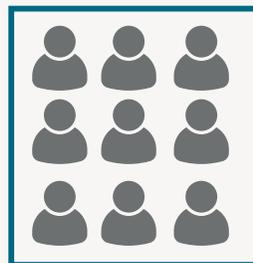
THINGS to CONSIDER

Considerations when planning a pilot: Number of participants



At the simplest level, the service’s impact is the difference in outcomes between two people: a recipient and a nonrecipient. But if you only have two people in your comparison, they may have different characteristics—such as age or gender—that also contribute to differences in their outcomes. Including more people in your comparison reduces the chance that extraneous factors are driving any differences you observe.

The more people you compare, the more confident you can be that the difference you see is caused only by the service.



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Considerations when planning a pilot: Unit of assignment



There are a number of ways to choose who gets access to the service. You can select specific clients, counselors, providers, or offices. But comparing two counselors is similar to comparing two clients. Factors unique to each counselor, such as quality of instruction, could also affect the outcomes.

You have 2 offices, each office has 4 counselors, and each counselor has 5 clients.

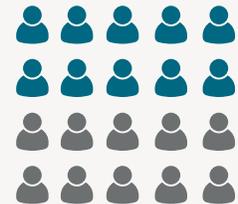
You can assign the service to one office and not the other.



You can assign the service to 4 of the 8 counselors.



You can assign the service to 10 of the 20 clients.



How do you assign service receipt?



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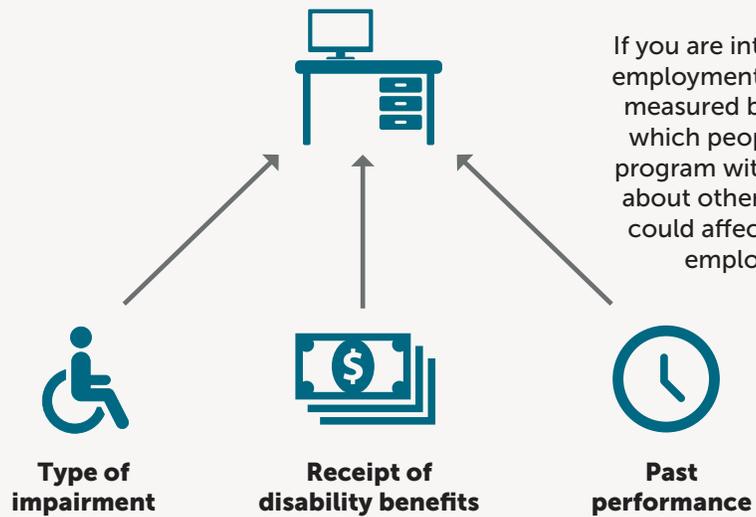


THINGS to CONSIDER

Considerations when planning a pilot: Data availability



Many factors could affect your outcome of interest.



Including previous work experience or background characteristics in your program evaluation can help

you see whether the differences in outcomes were caused by the service or by pre-existing differences in client characteristics.

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Considerations when planning a pilot: Defining success & certainty thresholds



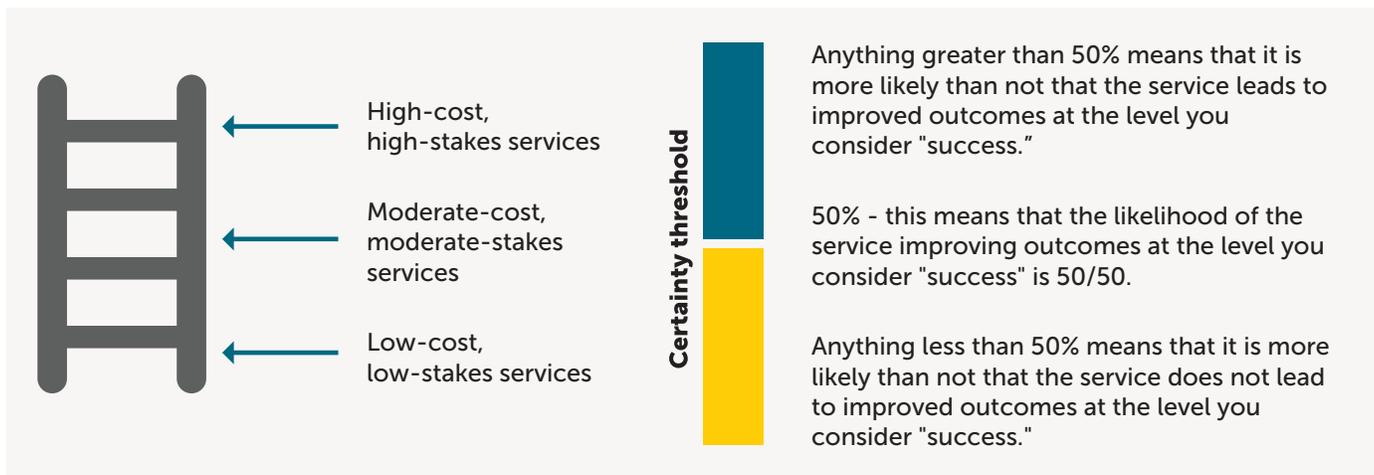
Your findings will indicate the probability that the service improved (or did not improve) outcomes by a certain amount. You will need to decide what a successful outcome looks like and how certain you want to be that the service caused the outcome.

WHAT WOULD SUCCESS LOOK LIKE?

This is the minimum amount of change in the outcome that you would need to see to conclude that the service is having the intended effect. Your answer may be different for different situations. For example, if you are evaluating a service that requires a big investment, you may require a larger improvement in the outcome before concluding that the service was successful. If you are evaluating the impact on an outcome that has proved difficult to change in the past, you may feel that even a small change counts as success.

WHAT IS YOUR CERTAINTY THRESHOLD?

The certainty threshold is the amount of uncertainty you are willing to accept when making a decision or recommendation based on your program evaluation. You might want more certainty if your results will affect a higher-stakes decision, such as whether to make a statewide or high-cost service change. But higher thresholds are harder to meet and may increase the chance of getting inconclusive results. You might be comfortable with less certainty for a lower-stakes decision.



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