



Using learning questions to guide road testing and reflection

Learning questions are an important component of a successful CQI road test. Your CQI team should develop learning questions when you start planning to test an improvement strategy. This prompts your team to intentionally consider and align on what you need to know about how the strategy works before you test it. Your learning questions will also inform the data you need to collect during the road test. During and after the road test, use your learning questions to make sense of the information you have gathered and to develop evidence-informed next steps. This tip sheet walks through how to develop useful learning questions to frame road testing and use them to guide reflection.

Before the road test: Framing a road test with learning questions

What types of questions are appropriate for a road test?

Learning questions should focus on the quality and feasibility of implementation and short-term outcomes. They should not focus on long-term outcomes or effectiveness, as a road test is not designed to answer causal questions. Learning questions are typically related to:

- **Time:** How long did it take?
- **Process:** How did you do this?
- **Response:** How did you experience it?
- **Outputs:** Did the strategy help staff provide more referrals?
- **Short-term outcomes:** Were clients satisfied with the program?

Considerations in developing learning questions

When developing learning questions, CQI teams should consider:



Uncertainties related to how the strategy will work

For example, you may be interested in learning whether clients will engage with a new service or program component and what factors affected their participation level.



How staff, clients, and partners experience the strategy

Ensure you are accounting for a range of perspectives. For example, you may be interested in learning about supports staff need to implement the strategy, as well as client and partner satisfaction with the strategy.



Contextual factors that might influence implementation

A strategy is not implemented in a vacuum. Develop questions related to contextual factors that may help or hinder implementation to learn how to address those factors. For instance, how did agency leadership help or hinder our ability to execute the strategy?

Not sure what to ask? To ask questions, you need a well-defined strategy and a detailed account of what you plan to do. A useful framework for defining a strategy is the 4Ps¹: Ensure you have spelled out the *people* implementing and affected by the strategy; *processes and practices* to implement the strategy; *products*, or tools and resources needed to support implementation; and *principles* that will guide proper implementation (e.g., coaching must be trauma-informed). Then, ask questions about those components. For example, did our training adequately prepare staff to provide trauma-informed coaching?

What process works well for creating learning questions?

When developing learning questions, gather input from the CQI team as well as relevant staff, such as those who will be responsible for implementing the strategy. One way to accomplish this is to give staff 3-5 minutes to brainstorm questions on sticky notes, then cluster and refine questions. Ensure questions are exploratory, feasible to answer with existing data or new data collection efforts, and useful for informing next steps.

After the road test: Reflecting on learning

Use your learning questions as a guide for reflecting on the road test

Your learning questions spell out what you hope to learn in a test. But be open to other unexpected insights that may emerge through your road test. Gather your CQI team (and other staff involved in the road test, as relevant) to review your road test data and engage in collaborative sense-making. Start with a high-level reflection of what happened:

What seems to have worked consistently well and not so well? What was inconsistent?



Think about your learning questions related to implementation of the strategy. For example, maybe at the start, you were interested in whether staff would have time to implement the strategy. If staff share that they struggled to find the time to implement the strategy, ask for suggestions for how to support them better.



Consider opportunities to adjust your strategy. How might we build on and use our strengths (aspects that have worked well)? How might we address or resolve the challenges that arose (aspects that have not worked well)?



Keep in mind that the strategy may not have worked the same way for all users (e.g., staff or clients). Examine findings by subgroups, if possible. For instance, if you administered a feedback survey to clients to understand their satisfaction with the program's new incentive structure, examine results by employed and unemployed clients – were both groups equally able to take advantage of the incentives?

What, if anything, was surprising, given expectations about how the new strategy would work?



Your assumptions about how the strategy would work are likely reflected in your rationale for the strategy. Return to your strategy rationale in section D2 of the HMRF CQI plan template. Does the strategy appear to be working that way? If you expected your improvement strategy would make it easier for clients to meet with their case manager, which would ultimately improve outcomes related to case management services, did the strategy make it easier for clients to engage with their case manager?

Turning your insights into evidence-informed next steps

After reflecting with your team, document your key insights in your CQI plan (section D4 of the HMRF CQI plan template). If your team is not able to respond to all your learning questions, continue road testing to collect additional data. For instance, you may find you're missing clients' perspectives and need to gather their feedback to be able to assess the strategy.

If you have the data you need to assess your strategy, did you identify necessary adjustments? Determine how you need to adjust the strategy and retest. Alternatively, you may determine the strategy was not feasible to implement or not fixable, in which case your team might abandon the strategy and test a different strategy related to your SMART goal. If you decide to move forward with the strategy as is, continue to monitor progress over a period of time to understand whether the strategy is helping to support success on your SMART goal. Use the CQI Road Test Decision Tree resource to help guide your decision making.

Using your strategy rationale. A key goal of a road test is to understand how your strategy works, with a focus on strengthening the design and implementation. Develop questions related to the rationale for your strategy that you spelled out in section D2 of the [HMRF CQI plan template](#). This speaks to how you assume the strategy will work. Use a road test to explore these assumptions—what outputs or short-term outcomes are you hoping to see that will support progress toward your long-term goals?

1 Brown CH, et al. An overview of research and evaluation designs for dissemination and implementation. *Annual Review of Public Health* 2017; 38: 1–22.

References

McCay, J., M. Derr, and A. Person. “Using a ‘Road Test’ to Improve Human Services Programs.” OPRE Report #2017-107. Washington, DC: Mathematica Policy Research, 2017. Available at https://www.acf.hhs.gov/sites/default/files/documents/opre/road_test_brief_final_b508.pdf.

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