Renaissance Philanthropy

From evidence to impact
BiTS support for designing a Health Solutions Science project

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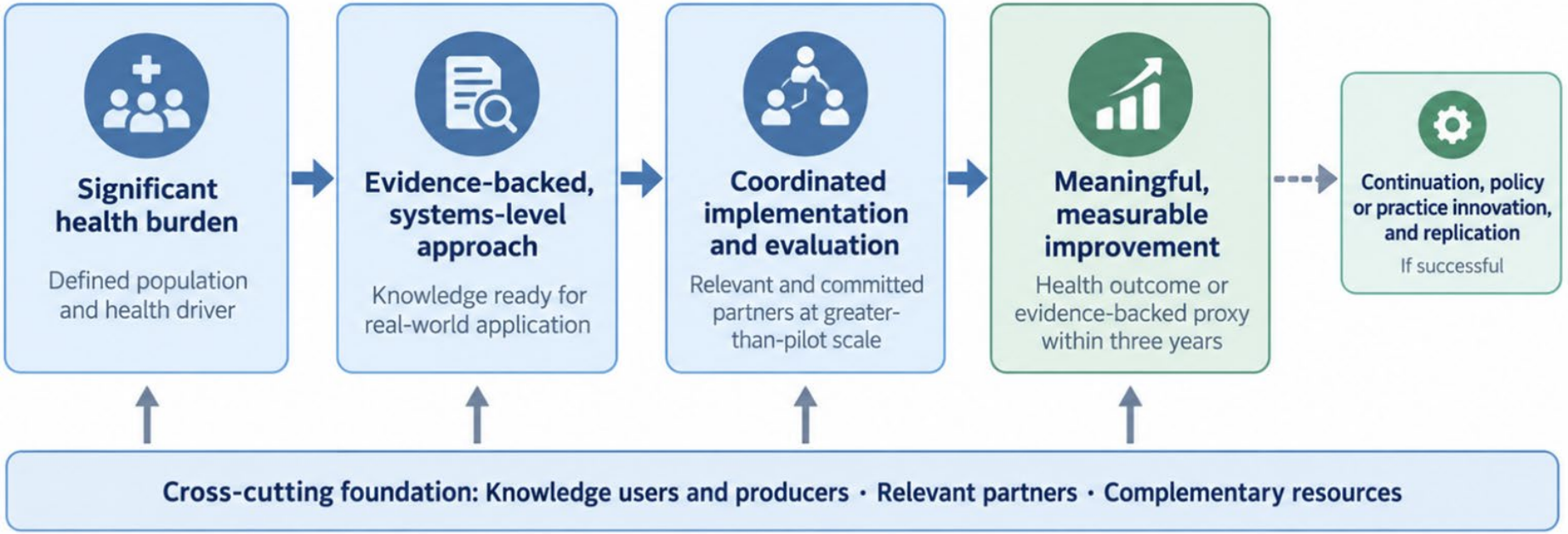
https://www.renaissancephilanthropy.org/bits

This tutorial is meant to complement the RFA with information that may be useful in designing your project, drawing on principles adapted from our BiTS program. We believe these are relevant whether your partnership is led by a knowledge user or knowledge producer. The tutorial does not set forth any new requirements or evaluation criteria, which are established solely by the RFA.

"The intent of this funding opportunity is . . . to demonstrate that coordinated implementation by relevant and committed partners can make a measurable difference."



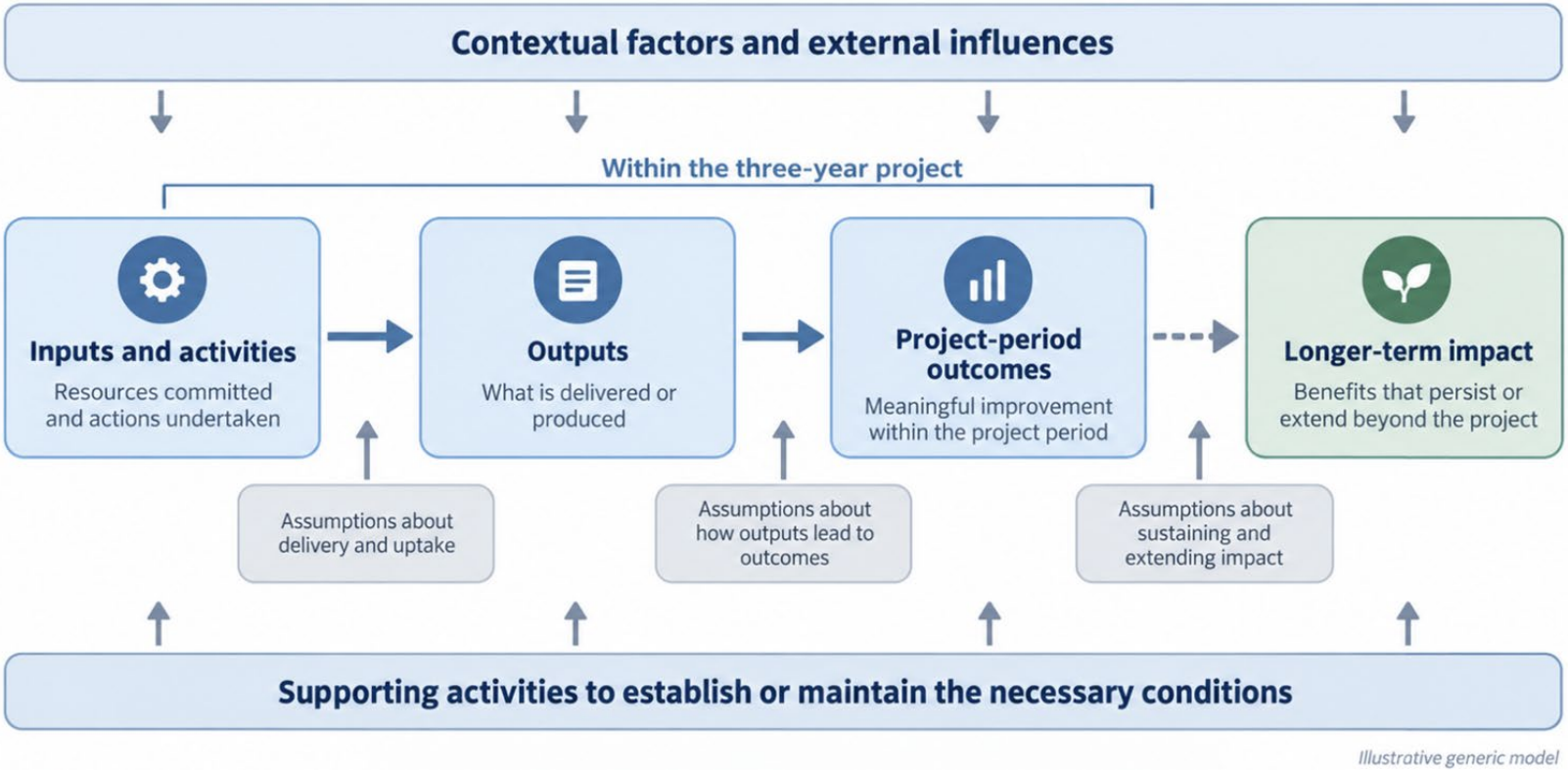
Theory of Change is the project's central logic

Explains how the proposed work is expected to produce the intended improvement for a defined population, in a specific context, within the specified time

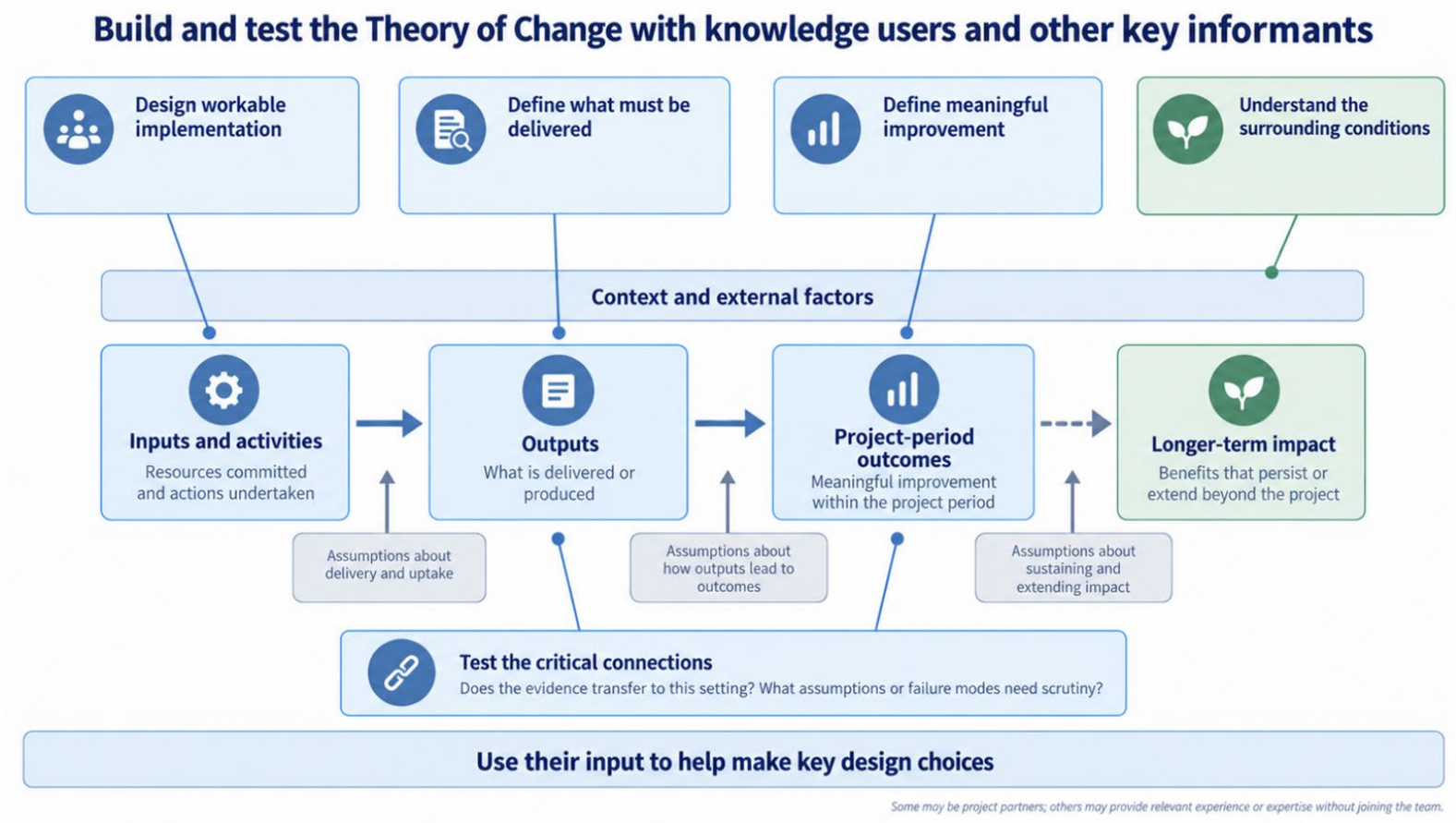
- Connects project activities to outcomes
- Makes important assumptions and contextual factors explicit
- Provides the basis for milestones, measurement strategy, and organization

Stage 1 application does not require a Theory of Change diagram. We offer it as a planning tool, not a requirement to use implementation science framing or any specific methodology.

Theory of Change



Illustrative generic model


Build and test the Theory of Change with knowledge users and other key informants
Design workable implementation
Define what must be delivered
Define meaningful improvement
Understand the surrounding conditions
Context and external factors
Inputs and activities
Resources committed and actions undertaken
Outputs
What is delivered or produced
Project-period outcomes
Meaningful improvement within the project period
Longer-term impact
Benefits that persist or extend beyond the project
Assumptions about delivery and uptake
Assumptions about how outputs lead to outcomes
Assumptions about sustaining and extending impact
Test the critical connections
Does the evidence transfer to this setting? What assumptions or failure modes need scrutiny?
Use their input to help make key design choices
Some may be project partners; others may provide relevant experience or expertise without joining the team.

Knowledge users: “individuals or organizations that may use the knowledge, evidence, findings, and resources generated by health solutions science to achieve measurable change in health outcomes at greater-than-pilot scale.” ***Lead organizations can be knowledge users or producers***

Knowledge user & other key roles (e.g.)	**What their perspective contributes to project design**
Patients / other beneficiaries	What improvement is meaningful; constraints on implementation; which potential beneficiaries might be overlooked
Operator / implementer	Delivery requirements; workflow considerations & workarounds; what’s been difficult to achieve in practice/failure modes
Gatekeeper	What is necessary for approval, how it’s determined, how long it takes
Domain expert	What the existing evidence supports, and how that could change when adapting to different populations/contexts

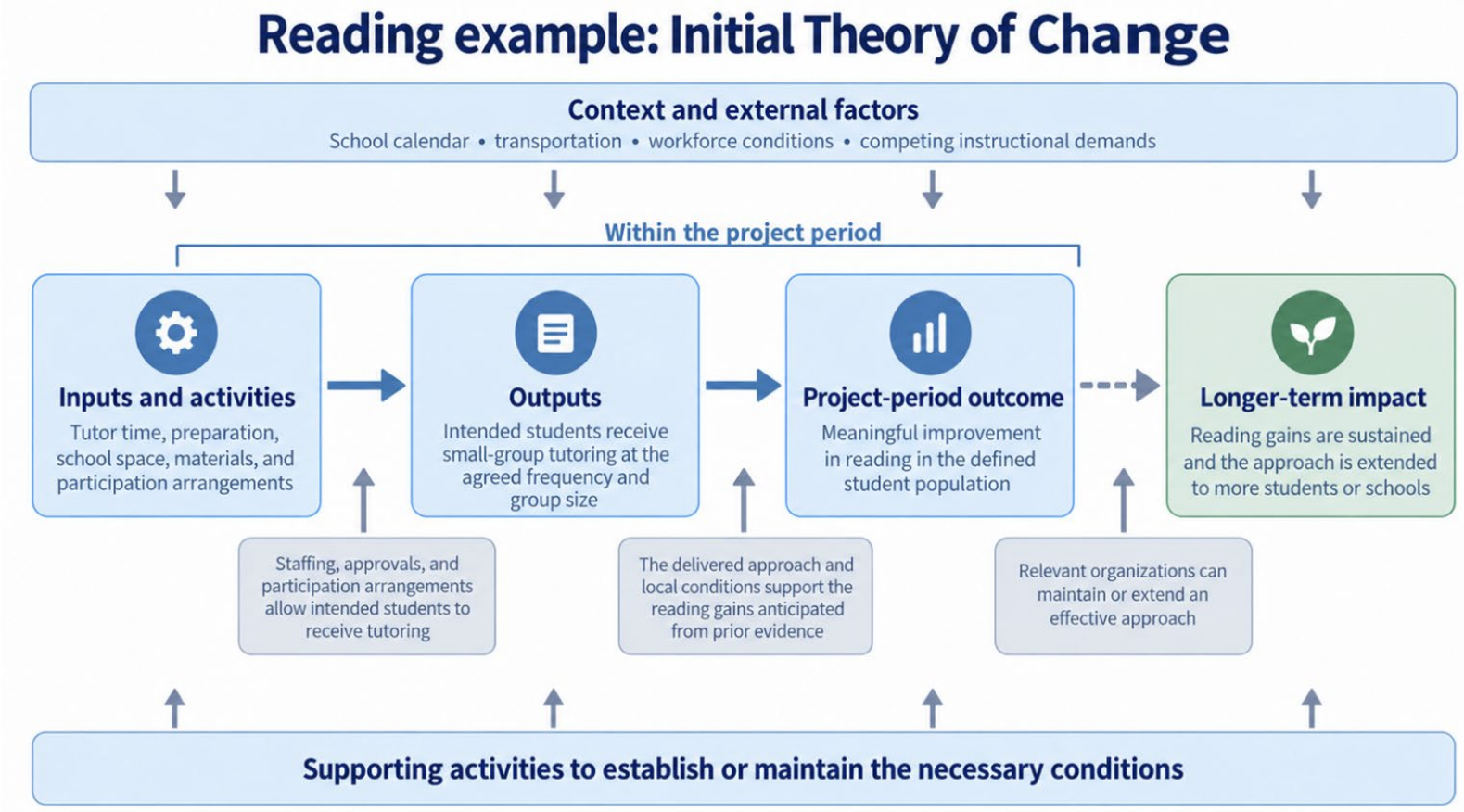
Some of these perspectives may already be represented in your leadership or partnership; consider whether any are still needed to help design the effort.

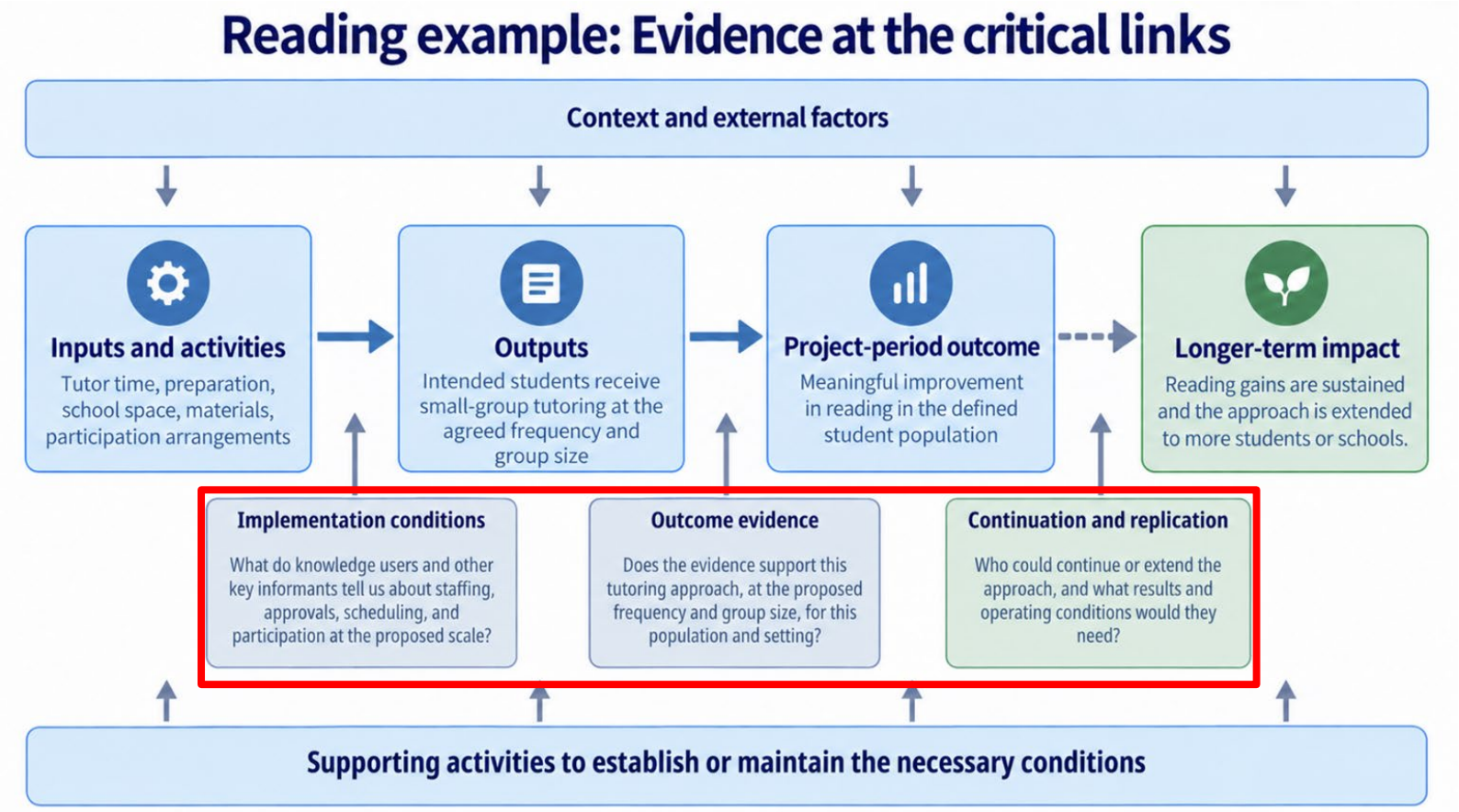
Hypothetical example: **Designing a school-based reading intervention**. A school district & nonprofit propose improving elementary students' reading by expanding an established small-group tutoring approach across schools. They are considering after-school delivery. There's strong prior evidence under certain conditions.

Knowledge user & other key roles	What their perspective contributes to project design
Beneficiaries: students & families who struggled to get reading support	What meaningful improvement looks like (e.g., reading independently); transportation and scheduling barriers
Operator: teachers with experience delivering the intervention	Staffing, preparation, scheduling requirements; what made delivery hard previously (e.g., staff turnover or conflicts with other activities)
Gatekeeper: district official who approves the delivery	Who reviews the plan; what's needed for approval; how timing fits the school calendar
Domain expert: reading researcher familiar with evidence for intervention	Which ages, language backgrounds, delivery conditions the evidence covers; whether changes in frequency, group size, setting are supported

Conversation approaches with knowledge users & other key roles to improve the Theory of Change

Question type	Example prompt	Reading project example: what might be learned and project design considerations
Story	Walk me through the last time that . . .	***Caregiver***: Previous tutoring program ended after the last school bus -> Who might the proposed arrangement exclude?
Constraint	What makes this difficult / slow / risky?	***Teacher***: Preparation time was not built into the schedule -> What staff time does reliable delivery require?
Failure	What was tried before and why didn't it succeed?	***Teacher***: Replacement tutors did not receive same training -> How could delivery quality be maintained through turnover?
Threshold	What would you need to approve or continue this?	***District official***: Reading gains, manageable staffing -> What results, operating requirements should be assessed?
Disconfirm	What would make this a non-starter / unworkable?	***Researcher***: Prior evidence supported smaller groups -> What would justify adaptation to the larger proposed groups?


Reading example: Initial Theory of Change
Context and external factors
School calendar • transportation • workforce conditions • competing instructional demands
Within the project period
Inputs and activities
Tutor time, preparation, school space, materials, and participation arrangements
Outputs
Intended students receive small-group tutoring at the agreed frequency and group size
Project-period outcome
Meaningful improvement in reading in the defined student population
Longer-term impact
Reading gains are sustained and the approach is extended to more students or schools
Staffing, approvals, and participation arrangements allow intended students to receive tutoring
The delivered approach and local conditions support the reading gains anticipated from prior evidence
Relevant organizations can maintain or extend an effective approach
Supporting activities to establish or maintain the necessary conditions


Reading example: Evidence at the critical links
Context and external factors
Inputs and activities
Tutor time, preparation, school space, materials, participation arrangements
Outputs
Intended students receive small-group tutoring at the agreed frequency and group size
Project-period outcome
Meaningful improvement in reading in the defined student population
Longer-term impact
Reading gains are sustained and the approach is extended to more students or schools.
Implementation conditions
What do knowledge users and other key informants tell us about staffing, approvals, scheduling, and participation at the proposed scale?
Outcome evidence
Does the evidence support this tutoring approach, at the proposed frequency and group size, for this population and setting?
Continuation and replication
Who could continue or extend the approach, and what results and operating conditions would they need?
Supporting activities to establish or maintain the necessary conditions

Applying existing evidence in a new setting

Consider transferability and what could be learned about broader applications.

Evidence topic	Questions to consider
Existing evidence	What did the intervention improve? What was the population and setting / context? How strong is the evidence?
Proposed adaptation	What differs in the population, setting, workflow, delivery approach, or other features?
Rationale for transfer	What evidence or reasoning supports applying the approach in a different setting / context? What assumptions remain?
Learning for broader generalizability	What could the project reveal about the broader generalizability of the approach by applying it in a new population or setting?

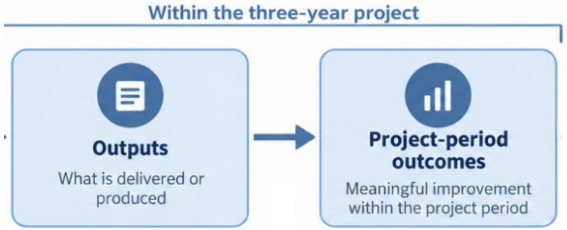
Why now? Barriers, tailwinds, headwinds

Context and external factors

Barrier	Tailwind	Headwind
What previously prevented implementation or limited impact?	What has changed externally to make the project more feasible now?	What external conditions could still work against the pathway?
Lack of after-school transportation made participation infeasible for some students	*A new district transportation or scheduling option may now be available*	*Staff turnover and competing demands may still make implementation difficult*

What has changed in the external environment, or what can you do through partnerships and teaming, to make it possible now?

Defining the "final exam"



What will the project demonstrate in 3 yrs?

- What outcome or evidence-based proxy must improve?
- For which population?
- From what baseline to what target?
- Under what conditions?

BiTS checks for final exam metric(s)

Meaningful	Measures something important to the intended impact. *For the RFA, this is not just proof-of-concept, but also need not be the full long-term vision.*
Actionable	Informs a consequential next decision (e.g., sustain, expand, adopt elsewhere, change policy or practice)
Specific	Clearly states what must be demonstrated, for whom, under what conditions, by when
Essential	Needed to determine whether the project achieved its goal

Why is this improvement possible within 3 years, given existing evidence, intended population, scale, delivery conditions?

Work backward from the final exam to define decision milestones

Use the Theory of Change to determine what should be demonstrated earlier to achieve the outcome and evaluate it. ***Investigate and address problems early***.

Milestone construction: By [time], demonstrate [result] using [evidence] to inform [decision]

Reading intervention example

What needs checking	Example	Decision informed
Measurement readiness	Before tutoring, baseline assessments available & follow-up plans are in place	Proceed or address measurement gaps first
Reach/delivery	Early review: target % of intended students receives tutoring at agreed frequency & group size	Proceed or adjust access, staffing, scheduling, etc.
Data integration	Early review: attendance & assessment records meet agreed completeness & linkage standards	Proceed or adjust data processes

Interpreting milestone evidence to make programmatic decisions

Consider in advance how milestone results will be interpreted & what response they trigger

Result	What the evidence suggests	Decision/response to consider
Green: on track	Evidence supports proceeding as planned	Continue as planned; prepare for next phase
Yellow: mixed evidence	Potentially correctable issue	Investigate the cause; identify a potential response to correct
Red: serious concern	A critical assumption or dependency may have failed, or final outcome measurement is at risk	Explicit decision about whether and how to proceed

Ensure the authority is in place to take needed action on milestone results. *Agree who can make necessary adjustments and how they are implemented.*

Aligning responsibility for outcome with authority to take action

Decision milestones are most useful if they can be acted upon

> *"**Operational leadership**: . . . how the project would be coordinated across collaborating organizations, who would lead each collaborating team day-to-day, and what authority they would have across partner organizations."*

Anticipate how the project might need to adjust & establish the mechanisms to enable adjustments

Design consideration	**Questions for the partnership**
Lead decision authority	What can the project lead decide / adjust?
Partner authority / commitments	Who can take action (commit resources, adjust workflow, etc.) within each partner organization?
Engaging external authority	What procedures are used when the decision authority is beyond the project team (e.g., a district official in the reading example)?

Changes are subject to grant and organizational requirements.

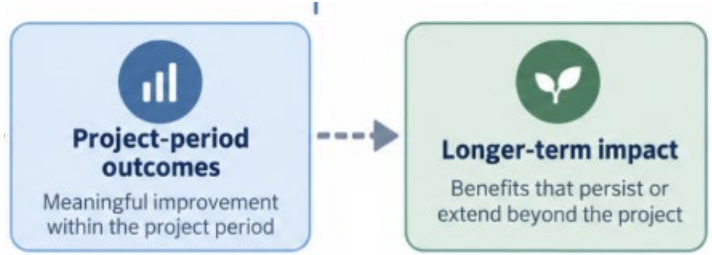
Designing the partnership around the Theory of Change

Start by thinking about the work needed to achieve the outcome

Design consideration	Questions for the partnership	Example
Implementation architecture	What can run in parallel vs. sequenced? Where is tight coordination needed?	Prepare tutors while arranging student access; complete baseline assessments before tutoring begins
Handoffs	What needs to change hands? When & in what form?	Connect nonprofit attendance records & district assessments
Capabilities & commitments	Who has the necessary expertise and operational authority? What people/resources are committed?	Assign staff & tim for instruction, assessment, data coordination
Incentives & leverage	What enables participation? What does the grant add, what resources do partners provide, how do they fit?	Resource preparation and data work; partner-provided space/staff time vs. grant-funded needs.

From 3-year outcomes to broader impact

Achieve meaningful improvement in 3 years and set up conditions to sustain or extend it

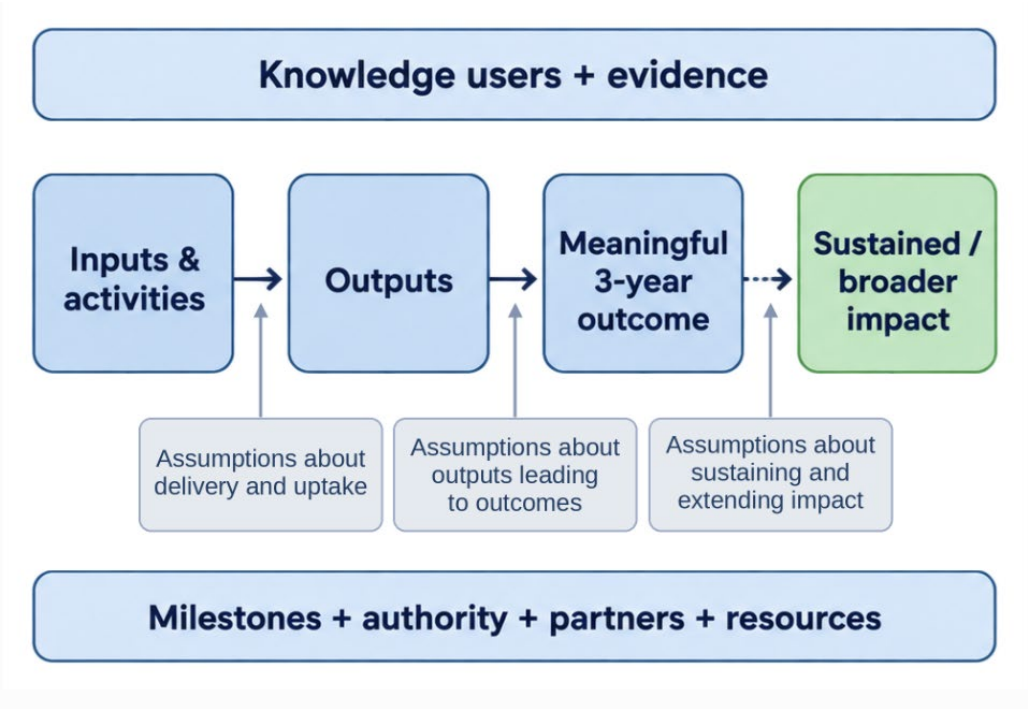


Reading example: District will decide whether to sustain or expand tutoring. May need evidence of reading improvement, reach across target population, feasible staffing & recurring resource requirements. Another district needs to know essential vs. adaptable delivery conditions.

Project-period outcome	Next actor & decision	What do they need to see?	What could follow?
Health outcome or proxy + learning from implementation	Who could sustain / adopt / fund the work; what is the decision they'd need to make?	E.g., results, delivery conditions, cost / resources / staffing	Continue or expand in current setting; replicate / adapt somewhere else; change policy or practice

Conclusion. An integrated plan for applying evidence to achieve impact

Theory of Change as a consistency check



Knowledge users help shape & pressure test the plan

Design logic & relevance: Do the resources / activities, outputs, and assumptions lead to a meaningful 3-year outcome?

Evidence: Does it support the approach and target outcome, and any adaptations needed?

Execution: Do the operational leadership / authority, milestones, partner roles, and grant-provided and partner-contributed resources make the plan workable?

Broader impact: Who could sustain or extend the improvements, and what do they need to see within the 3-year timeframe?

Q&A

BiTS Office Hour: Friday, October 30, 3 - 4 pm ET

Optional discussion of pre-proposal project design questions like those covered today. The session will complement the RFA, and will not evaluate individual project fit or award prospects, or establish any new requirements.

This resource is provided by the Collective in partnership with Renaissance Philanthropy and the BiTS team.

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