E2A Tool Kit:

II. Planning for E2A Products

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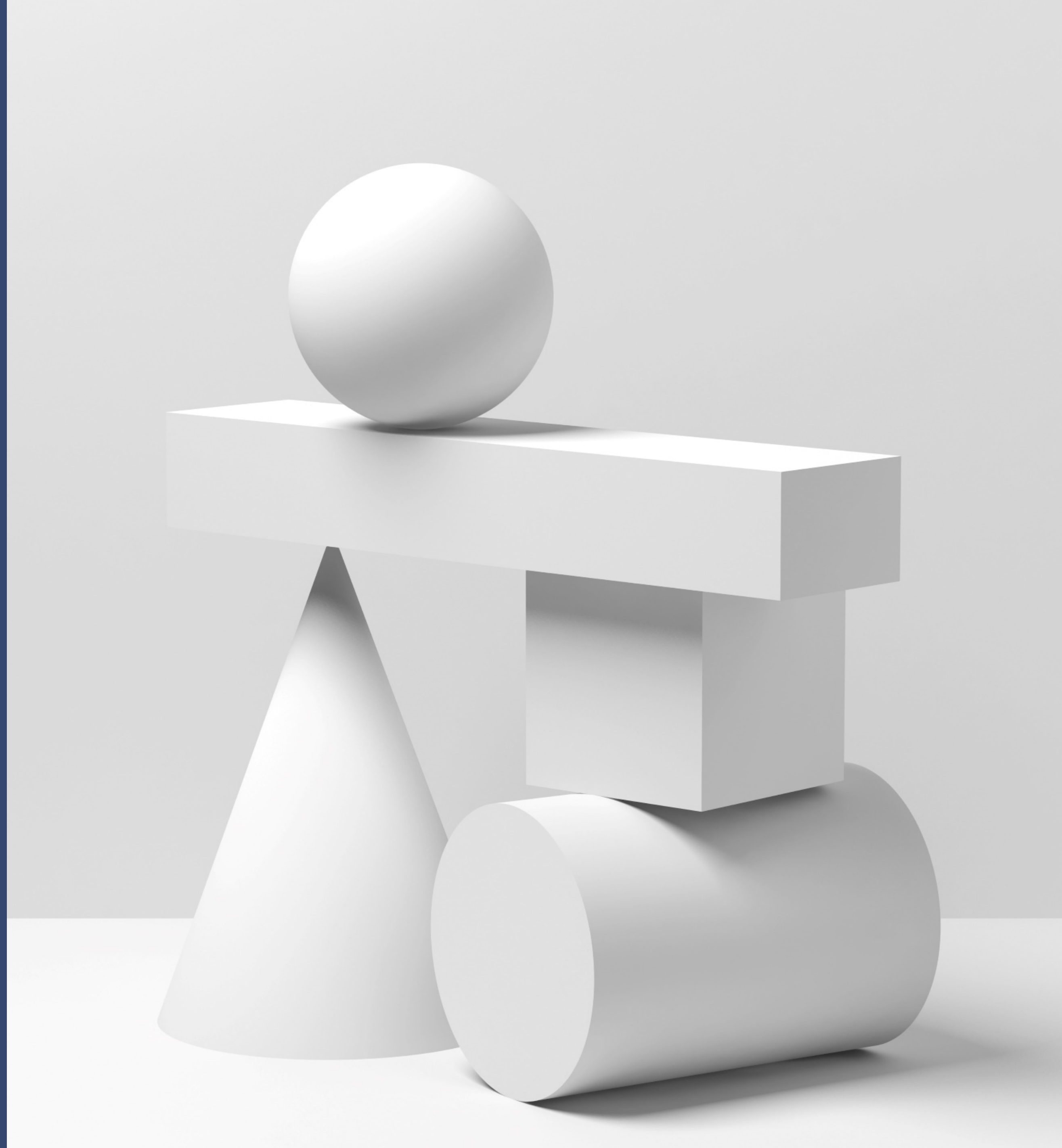

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II. Planning for E2A Products

Developing E2A products requires that we update our default ways of producing research. Too often we only begin thinking of dissemination and communication planning after we complete the research and start to draft our reports. Instead, we need to think about and plan for products that take evidence to action upfront *during* the research design stage.

We are designing for people who are busy and distracted by many different demands on their time. For our research to shape action, we've got to make our research findings easy, attractive, social, and timely (Behavioural Insights Team, 2014). We can only do this effectively with the limited time and resources we have if we are intentional and tailored in our approach. This chapter outlines five planning steps to develop E2A options more efficiently and cost effectively.

Key Steps

Identify Users	Plan User Journeys	Brainstorm Options	Organize Teams	Be Inclusive in Design

Step 1: Identify users and define E2A goals

Research teams define target audiences (users) and dissemination goals. Unfortunately, their definitions of target users are often too broad to be useful. For instance, "policymakers, practitioners, and researchers" is too broad a definition because the contexts, information needs, and learning styles of each of these groups, and even different types of decisionmakers, are so different. For effective E2A planning, take the following steps during the design phase of the project:

1. **Define a single *primary* user.** We know your research will have diverse users. But it is important for you to define your primary one. This primary user is not necessarily the funder (e.g., the Chief Evaluation Office) – it could be program administrators and staff at the federal, state, or local level. It may be useful to coordinate with the program office contact on framing "why the agency wanted this study" to help define the primary user.

- **Only then identify some secondary users.** Be specific when identifying both primary and secondary users. For example, if you have findings on youth employment programs, don't just select policymakers on youth programs as an audience. That's too general. Specific target options might be the director of youth programs in the Office of Workforce Investment at DOL, or the state program administrator for the workforce program studied, or the policy directors for the mayor's office in the cities included in your study.

2. **Understand your users' top tasks, the specific information they need, and the actions they need to take.** Do this at the start of your project if you can.
   - **Be specific.** Too often, we determine the broad goals of our target users and partner agencies, but we don't spend time probing the specifics of what they need to know. A broad goal might be "I want to understand how to engage youth in our workforce program better." A specific goal might be "I want to know whether to invest in text messaging capability when I contract for a new case management system for our youth program in January next year and what features to ask for." This level of detail can help you refine your focus and research design on the front end, yielding more actionable evidence. It can also guide your research dissemination strategy.
   - **Understand the timeline for action.** Ask upfront when people will need the information and look for opportunities to share insights throughout the study. The DOL evidence capacity assessment identified a common complaint among agencies that research projects take too long to generate actionable insights. Understanding timing can help you determine whether you can time the interim or final results to inform practitioners' needs.
3. **Understand what your users already know.** This is important not just for designing your research questions but for understanding how the information you are collecting will fill a gap or need.
4. **Understand how your users learn.** Where do your users typically go to get the information they need (e.g., peers, search engines, specific websites)? How do they prefer to learn? Where and when and in what contexts do they search for and review evidence?

Step 2: Plan for user journeys through research

Now that you have defined your primary and secondary users and their needs, you should consider how to get them to engage with the products you produce. Consider the steps below to help plan their journey through evidence use.

1. **Understand that evidence use is a journey.** Remember that evidence adoption rarely happens in a single step. Instead, the audience has to make and follow through on a series of choices. The onus is on researcher producers to invest in and plan strategies that help their audience move from an awareness of relevant research to considering whether to review it, then to reviewing it, applying it, and finally serve as an evidence champion who shares evidence with others and encourages them to use it (see Exhibit II.1).

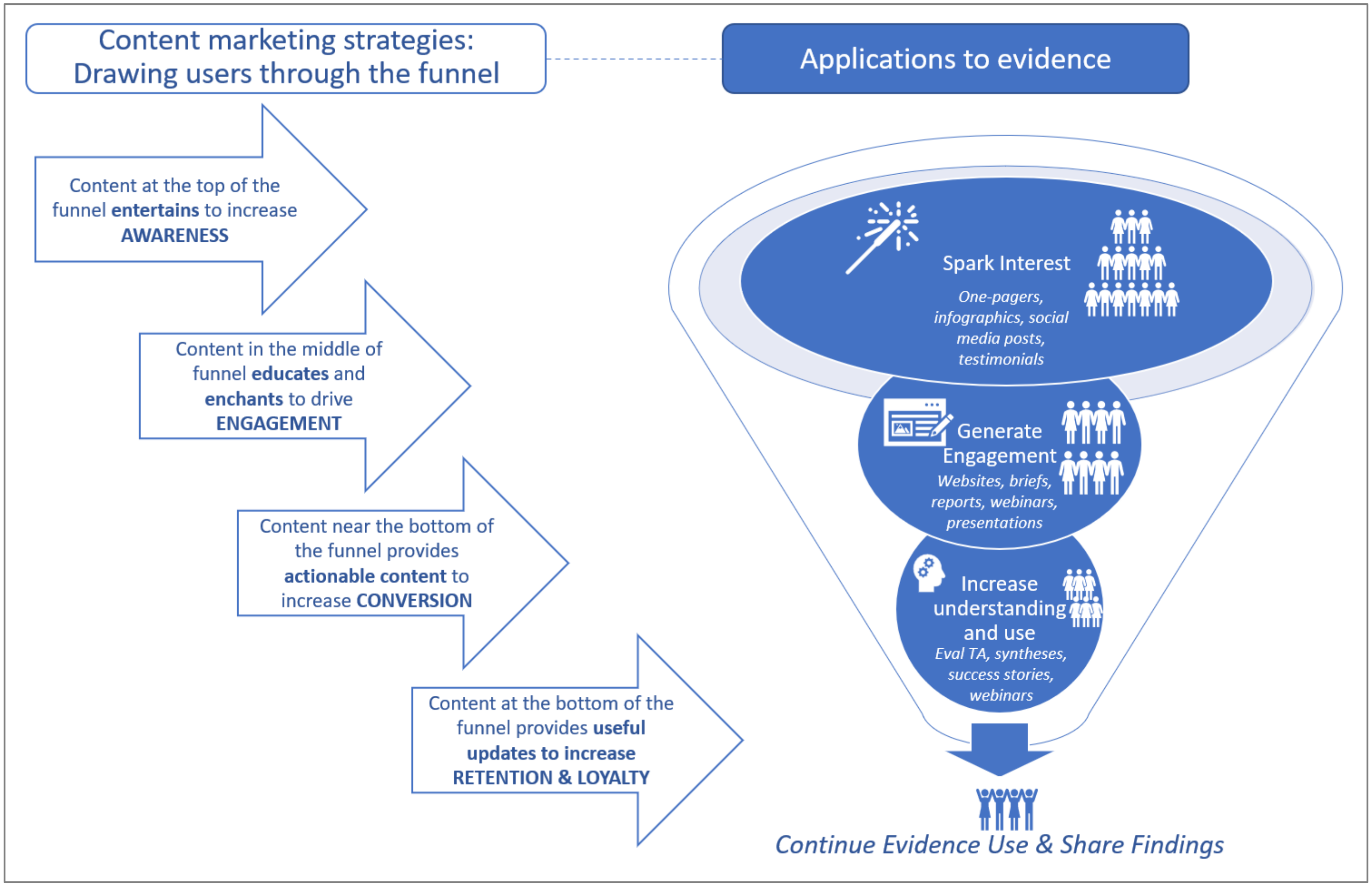
Exhibit II.1. Steps in the Journey of Evidence Use

Source: Developed by authors, inspired by the PROSCI ADKAR® model of change management (Hiatt, 2006) and content marketing concepts (See https://www.lucidchart.com/blog/content-marketing-funnel as an example).

2. **Strategize about your "push strategies" to move users along this journey.** Think hard about what types of research products, dissemination strategies, and research product features will move your target audience along from one step to the next. Think also about the features that might deter them. This will help you in your strategic planning around E2A.

3. **Apply a content marketing approach to research dissemination.** Content marketing focuses on four objectives: attracting attention, driving engagement, propelling conversions, and increasing retention and brand loyalty. Since fewer and fewer users make it from one stage through the next, creating a funnel effect. Exhibit II.2 describes the E2A equivalent for each of these marketing goals and the types of research products that can be helpful in driving users through the funnel from awareness to sustained evidence use and advocacy.

Exhibit II.2. Applying Marketing Strategies for Customer Acquisition to Research Adoption



Source: Developed by authors, adapting concepts from content marketing strategies (See https://www.lucidchart.com/blog/content-marketing-funnel as an example).

Step 3: Brainstorm a menu of options for dissemination

You are likely to need different types of research products and dissemination strategies to help advance E2A. There are two reasons for this. First, for each audience, you are likely to need different elements to move them through the different stages of evidence use. Second, while you should have one primary audience, you likely will have multiple secondary audiences, and different audiences find different types of research products compelling. Exhibit II.3 provides a partial list of the different types of research deliverables.

1. **Start thinking about your dissemination strategy early.** If, at the research design phase, you are already thinking about the kinds of deliverables you might produce, you can use your knowledge development activities to understand user preferences about deliverables.
2. **Create your planning documents with E2A in mind.** Focusing on E2A from the beginning, include text and visuals in your research design documents (research design plans and slide decks, site recruitment one-pagers) that can be repurposed for sharing findings and results.
3. **Plan on creating multi-use content from the start.** Different audiences learn and share differently. Audiences also learn best when information is shown in diverse ways. (See next section.) Plan on developing reports with visuals that can be excerpted to slides, infographics, and reports.
4. **Plan to identify and leverage existing venues for dissemination.** Keep a running list of organizations/partners that could be good audiences for and promoters of your findings. Early on, let them know about the research you are conducting and find out what their members might find compelling. By doing so, you can cultivate a ready audience, and the insights gained can serve as the "hooks" for framing your findings. Think about conferences you can leverage, especially practitioner conferences (e.g., annual conferences and meetings organized by the National Association of Workforce Boards Forum, the National Governors Association, and the National Association of State Workforce Agencies).

> ***Bonus tip:*** *The hardest deliverables to develop and likely the most useful ones will be the shorter ones (briefs). If you opt for these, set aside enough time to develop, user test, and refine them.*

Exhibit II.3. Menu of Research Products

Product Type	Purpose	Examples
Report	A comprehensive description of the study, including methods, sample, analysis, and findings.	▪ Design/Analysis plans ▪ Literature review reports ▪ Impact and implementation study reports
Brief	A short (3- to 6-page) plain language description of the most important and actionable findings.	▪ Overview/summary of study findings ▪ Findings summaries for specific audiences/topics ▪ Case studies
Presentation Slide Deck	A high-level overview of a study along with a summary of findings that uses easy-to-digest visuals and short, plain language bullets.	▪ Report briefing slides ▪ Pitch decks ▪ Webinars ▪ Self-guided resource
Data Visualization	A graphic display of multiple concepts and actionable findings from the evidence through one view.	▪ Static data visualization ▪ Animated data visualization ▪ Interactive tools, such as data dashboards
Clearinghouse	A web-based "storage room" for evidence and research on specific topics. Provides public access to evidence products	▪ Targeted to specific users ▪ Targeted to specific topics
Marketing product	Diverse deliverables in different media designed to whet the appetite for learning more about evidence	▪ Social media posts ▪ Short videos ▪ Story maps

Source: Developed by authors.

Step 4: Organize Teams to Create E2A-Ready Deliverables

1. **Assemble multi-skilled teams and emphasize E2A as the primary goal.** To develop effective communication products, it is helpful to assemble teams with diverse skills. You will need individuals with strong technical and content expertise, as well as strong writers who can communicate complex ideas simply and designers with good visual communications skills. Integrating people with these varied skill sets in the brainstorming phase can help set you up for success. Also set expectations that for each research product, teams will likely need to collaborate around the following three steps that are common elements in the subsequent product chapters:

2. **Emphasize the four elements that will need to be incorporated into all your products.**

   - **Simple writing:** Words are the building blocks of evidence dissemination. Often, research teams are well trained on how to communicate with other researchers. However, many of us need more practice in using language simply to share complex ideas with practitioners and policymakers.
   - **Effective visuals:** We are more likely to retain information when it is shown visually. Plan on using visuals to convey complex ideas simply and memorably. Visuals also have the advantage of breaking up walls of text that may otherwise bore or intimidate audiences.
   - **Design to focus attention:** Well before we read text, we form an impression of what it says. Design can be a powerful tool for focusing attention. Key elements of design that teams must plan on playing close attention to are:
     - Using **font** families for consistency and different font sizes to reinforce the hierarchy of ideas.
     - Using **color** to focus attention and make text inviting.
     - Removing **clutter** and only keeping style elements that aid understanding.

     See Chapter VI. Data Visualization to learn how to leverage design elements effectively.
   - **Storytelling.** People are inclined to be moved by stories, which stick with us more than data. Stories that are focused on people motivate us to act more than pure numbers can. Stories, testimonials, case studies, and pictures draw in your audience, vest them in what you have to say, and help them recall your content.

3. **Establish a style guide for products early in your project.** Developing and sharing effective templates and practices upfront make it easier to develop E2A products within the available time and budget constraints. Big teams with multiple content contributors will find them especially useful. Use style guides to prescribe shared practices for writing, formatting, and design elements. Style guides should be shared with DOL for its review and approval before use.
   - **Keep content consistent.** Audiences get confused when researchers talk about similar concepts in different ways. Making content consistent at the end can be expensive. Sharing E2A-friendly, language use guidelines upfront can help build team capacity and increase efficiency.
   - **Use design consistently and intentionally.** Developing a consistent design style guide to be applied across a suite of products adds efficiency both for research teams and their audiences.
4. **Plan proactively for keeping a focus on E2A through reviews:** As noted earlier, research teams receive multiple rounds of review, both from technical research experts and subject matter experts. In most instances, researchers are asked to add more information. Our response to this feedback is often to lengthen text or add footnotes or boxes. To help avoid the reaction to add detail in response to all technical comments, we propose that research teams consider the following strategies:
   - **Balance E2A principles with the need to show rigor.** Discuss upfront with the contracting officer's representative (COR) how to balance the need for conciseness and being reader friendly with the need to show rigor. Explore whether the COR can share DOL priorities around E2A-friendly products with reviewers in advance.
   - **Plan for reviews.** Reserve enough resources and time at the review stage not only to address technical concerns but to maintain conciseness, clarity, and focus.
     - The key question to ask at this stage is whether the requested addition will help focus the attention and advance the understanding of our target users or distract them. If the target audience is not an academic or technically oriented one, it's especially useful to ask this question.
     - Whenever possible, include revisions asking for additional detail in the appendices rather than in the main text. You may be tempted to add footnotes, but remember that footnotes take the reader's eye (and focus) away from the main text and should be used sparingly.

Step 5: Be inclusive in writing and design

1. **Lower the reading level.** If writing for a practitioner audience, you want to make it easy for readers to get your point. Writing at an 8th-grade reading level or lower in the main sections of the report makes it easier for your audience to digest the content quickly the first time they read it.
2. **Assess your writing.** Use a tool like Microsoft (MS) Word's Readability tool to assess reading level. Note though that Microsoft Word's assessment of the readability score of text may be lower than that computed by alternate software like Arte, so aim for a reading score lower than what you intend.
3. **Design and format for accessibility and 508-compliance**
   - Use uniform and hierarchical headings to structure the document. Use built-in document structure when possible (e.g., titles and slide elements in PowerPoint, headers in Word) as this makes products easier to follow for screen reader users.
   - Use simple table configurations.
   - Choose color contrasts carefully.
   - Ensure the final document is 508 compliant. Draft alternate text for images, charts, and infographics.
   - Avoid using URLs in written products or PowerPoints; give links a descriptive title that would explain to a screen reader user where they lead.
   - Use built-in tools (e.g., Selection Pane in PowerPoint, Reading Order tool in Adobe) to select, review, and confirm the order in which text elements will be read by a screen reader.
   - Use software accessibility checkers (available in Microsoft products and Adobe) to check for issues you may have missed and use your 508 Compliance Office or other organizational resources to check and provide feedback on your products.

Planning Checklist

- **Identify audiences and define primary goals**
  - ☐ First define a single primary audience, and then identify any secondary audiences
  - ☐ Understand their top tasks and needs
    - — Be specific in defining needs
    - — Understand the timeline of information needs
  - ☐ Understand what your audiences already know
  - ☐ Understand how they learn
- **Plan for user journeys through research**
  - ☐ Understand the user journey of evidence use
    - — Awareness > Consideration > Review > Application > Championship
  - ☐ Strategize about push strategies to move users from one stage to the next.
  - ☐ Appy a content marketing approach
- **Brainstorm a menu of research products for dissemination**
  - ☐ Start thinking about your dissemination strategy early
  - ☐ Create planning documents with E2A in mind; create multi-use content wherever possible
  - ☐ Plan to identify and leverage existing venues for dissemination
- **Organize teams to create E2A-ready deliverables**
  - ☐ Assemble multi-skilled teams and emphasize E2A as the primary goal
  - ☐ Develop and use style guides for consistency and efficiency
  - ☐ Maintain focus on E2A through reviews and revisions
- **Be inclusive in design**
  - ☐ Write at an 8th-grade reading level or below
  - ☐ Assess writing for readability
  - ☐ Format for accessibility

Resources

Accessibility and 508-Compliance

- Accessibility Conformance Checklists (from HHS): https://www.hhs.gov/web/section-508/accessibility-checklists/index.html
- Accessibility Resources (from Microsoft): https://www.microsoft.com/en-us/accessibility/resources
- U.S. Access Board: http://www.access-board.gov/
- Section508.gov: http://www.Section508.gov
- WebAIM: http://webaim.org/

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About this Project

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Finally, we are grateful for the scores of experts from across disciplines who share their ideas with the world on how to communicate effectively and influence action. We are learning from you, applying your recommendations, and learning and adapting as we go. We hope this collation of the many ideas you've shared and additions to them do justice to your wisdom. All errors are our own.

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