# Estimating the impact of strategies on trajectories

## Introduction

A trajectory is a series of interim targets that plot the planned path of the metric between now and the target date. The trajectory can be used to estimate expected impact, which can be used for monitoring and making mid-course corrections during implementation. Of course, no one can project the future, but the trajectory asks leaders to provide their best guesses of what future performance will look like, given the available evidence. We often develop the trajectory by estimating the impact of each of the strategies on the goal metric.

In this exercise, participants will use one of two methods for estimating the impact of strategies on a given goal:

- Identifying whether each strategy will have a low, medium, or high impact from one year to the next
- Estimating the scale and efficacy of each strategy

The Delivery Unit or other leaders should first decide which method works best for this particular system. Once decided, the appropriate exercise should ideally be completed by the leaders of each of the relevant strategies, with the support and input of the goal leader.

## Objectives

- Identify the appropriate approach for estimating the impact of strategies on the trajectory
- Estimate the impact of strategies on a given goal metric
- Reflect on the trajectory and make any adjustments

## Materials needed

- Markers
- Recreate the template on page 4 (Option 1) or page 7 (Option 2) and post on the wall. You can do this by printing a large version of page 4 or page 7 and hanging that on the wall, or by recreating the template on a dry erase board, flip chart paper, EDI's signature "brown paper" or in a pinch projection of a computer screen. However you create this, it needs to be visible to the entire group and easy to change and add to.

## Time

- Exercise: 90 minutes

## Pre-work

Before beginning the exercise, you as facilitator should decide which method will be best for estimating the impact of strategies in your system. Consider this question: How formal, scientific, or exact do you want estimates to be?

- If not very formal – more of quick, educated guesses, choose **Option 1: Low/Medium/High** (pages 2-4)
- If more formal, more "scientific," choose **Option 2: Scale x efficacy method** (pages 5-7)

## OPTION 1: USING LOW/MEDIUM/HIGH TO ESTIMATE A TRAJECTORY

### INSTRUCTIONS

| Time | Activity | Facilitator notes | Materials |
|---|---|---|---|
| 60 minutes | ■ Agree upon the goal on which you are focusing and the strategies that will impact that goal<br>■ For each of the strategies, identify whether it will have a zero, low, medium, or high impact on the overall target ***relative to the previous year's impact*** over each of the next several years and record these on the template | ■ There are two methods for doing this:<br>– Walk through each strategy one-by-one and ask participants to call out answers identifying whether each will have high, medium, low, or zero impact in each year; record their responses on the template<br>– Assign each participant a strategy (ideally they will already have identified an owner for each strategy in previous planning exercises) and ask them to estimate high, medium, low, or zero impact for their strategy in each year and record their own responses on the template<br>■ Note that it is important to reiterate that participants should be considering impact relative to the previous year. For example, if we expect low impact in year 1, and the same level of impact in year 2, then year 1 should be marked low and year 2 should be marked as zero impact<br>■ Encourage participants to draw upon the following sources for their estimates:<br>– The descriptions of their strategies, outlined in the strategy profiles and delivery chains<br>– The relative impact of each strategy as placed on the 2x2 matrix<br>– Any existing available research, including data on the impact of best practices as well as any data from implementing this or similar strategies in the system previously | ■ Template on page 4<br>■ Markers |

| Time | Activity | Facilitator notes | Materials |
|---|---|---|---|
| 30 minutes | ■ Based on the estimates and any data you have about past and present performance, identify approximately how many students low, medium, and high would each represent and record those numbers on the template<br>■ Use those numbers to add up the overall impact of each of the strategies over time and estimate interim targets that will lead to the end target<br>■ Reflect again on the estimates, now with the numbers of students in mind<br>■ Make any necessary adjustments to the estimates | ■ To some extent you will need to play around with the number estimates then check them to see if they make sense; continue this until the picture looks reasonable<br>■ Once numbers are all input, ask participants to look at the overall picture and consider:<br>– Is the number of students associated with each strategy feasible, given what we know about scale and resources over time?<br>– Do the relative estimates of each strategy's impact make sense? (For example, will the strategy that projects the highest impact here have the biggest impact in practice?) | ■ Template on page 4<br>■ Markers |

## OPTION 1 TEMPLATE: USING LOW/MEDIUM/HIGH TO ESTIMATE A TRAJECTORY

**Goal:** _____

| Strategy | Year 1 | | Year 2 | | Year 3 | | Year 4 | | Year 5 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 0/L/M/H | Estimated number of students | Additional 0/L/M/H | Estimated number of students | Additional 0/L/M/H | Estimated number of students | Additional 0/L/M/H | Estimated number of students | Additional 0/L/M/H | Estimated number of students |
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| **Total impact each year** | | | | | | | | | | |

## OPTION 2: USING SCALE X EFFICACY TO ESTIMATE A TRAJECTORY

### INSTRUCTIONS

| Time | Activity | Facilitator notes | Materials |
|---|---|---|---|
| 60 minutes | ■ Agree upon the goal on which you are focusing and the strategies that will impact that goal<br>■ For each of the strategies, identify the scale of students it will reach, ***relative to the scale of the previous year***<br>■ For each of the strategies, identify the efficacy that it will have (as percentage points) above the efficacy of the previous year<br>■ Multiply scale x efficacy to estimate the total number of students impacted by each strategy each year | ■ There are two methods for doing this:<br>– Walk through each strategy one-by-one and ask participants to call out answers identifying the scale and efficacy of each strategy in each year of the future period; record their responses on the template<br>– Assign each participant a strategy (ideally they will already have identified an owner for each strategy in previous planning exercises) and ask them to estimate scale and efficacy for their strategy in each year in the future period and record their own responses on the template<br>■ Note that it is important to reiterate that participants should be considering scale relative to the previous year. For example, if we expect a scale of 20 students in year 1, and the same scale in year 2, then scale in year 1 should be marked as 20 and scale in year 2 should be marked as 0<br>■ Encourage participants to draw upon the following sources for their estimates:<br>– The descriptions of their strategies, outlined in the strategy profiles and delivery chains<br>– The relative impact of each strategy as placed on the 2x2 matrix<br>– Any existing available research, including data on the impact of best practices as well as any data from implementing this or similar strategies in the system previously | ■ Template on page 7<br>■ Markers |

| Time | Activity | Facilitator notes | Materials |
|---|---|---|---|
| 30 minutes | ■ Add up the impact of each of the strategies to get a total number of students impacted each year over the future period<br>■ Reflect on the overall impact that the strategies will have together<br>■ Make any necessary adjustments to the estimates | Once numbers are all input, ask participants to look at the overall picture and consider:<br>■ Is the amount of student impact that we achieve with these estimates sufficient?<br>– If not, is it that we don't have the right strategies?<br>– Or is it that we have estimated the impact of these strategies incorrectly?<br>■ Do the relative estimates of each strategy's impact make sense? (For example, will the strategy that projects the highest impact here have the biggest impact in practice?) | ■ Template on page 7<br>■ Markers |

## OPTION 2 TEMPLATE: USING SCALE X EFFICACY TO ESTIMATE A TRAJECTORY

**Goal:**

| Strategy | 2015-16 | | | 2016-17 | | | 2017-18 | | | 2018-19 | | | 2019-20 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Scale | Efficacy | **Impact (SxE)** | Add'l Scale | Efficacy | **Impact (SxE)** | Add'l Scale | Efficacy | **Impact (SxE)** | Add'l Scale | Efficacy | **Impact (SxE)** | Add'l Scale | Efficacy | **Impact (SxE)** |
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| **Total impact each year** | | | | | | | | | | | | | | | |