Episode 57: Designing Meaningful, Novel, & Impactful Research

with Emily Cardon, Principal Advisor & Head of Research for BIT Americas,
& Stephanie Wilcoxen, Senior Research Advisor, BIT

As researchers at BIT, Emily Cardon & Stephanie Wilcoxen know their way around the collaborative puzzle that is research design. Together we talk through the who, what, why, and how of research design, with a focus on the particular challenges and opportunities of field or "real world" research. Among the many insights they share, Stephanie and Emily highlight the importance of the research questions leading the design, rather than vice versa.

Transcript:

KIRSTIN APPELT, HOST: Welcome to this edition of Calling DIBS. I'm your host, Kirstin Appelt, Research Director with UBC Decision Insights for Business and Society or DIBS for short. Today we're calling DIBS on Emily Cardon and Stephanie Wilcoxen.

Emily is a Principal Advisor and Head of Research for BIT Americas, and Stephanie is a Senior Research Advisor at BIT. As our listeners know, BIT is a world leader in doing important, rigorous, impactful work in applied behavioural science, so I'm really thrilled to have this opportunity to talk shop with Emily and Stephanie today. Welcome to the podcast.

EMILY CARDON, GUEST: Thanks for having us.

STEPHANIE WILCOXEN, GUEST: Thank you.

APPELT: We often start by just hearing about folks winding journeys to behavioral insights, because we find that very few of us just went from A to B, most of us went from A to C, D, E, D, E, B, B in a winding sort of way. So can we hear a little bit about what brought you to BI and to your roles that bit? And maybe we'll start with Emily.

CARDON: Perfect. Yeah, it's definitely true for me. I come to this work largely through my work in policy. I started after undergraduate. I started work in Congress and in the sort of policy world government, public administration actually making policy, and it was those experiences that really showed me that there had to be practical ways to make public services work better. And really inspired me to see if we could use evidence to guide where and how we do that.

So that interest really powered me through grad school and trying to learn everything I possibly could about program and policy evaluation. And then finding BIT and behavioral science actually came quite late in that journey, but was such a natural fit in terms of the approach and philosophy and how it thinks about solving real world problems. So it's been really exciting to be involved in such a multidisciplinary and evolving field.

APPELT: That's really interesting. I feel like most of the folks we talked to haven't had that journey through policy so that's an exciting lens to add on. Stephanie, what about you?

WILCOXEN: Yeah, mine is also not linear, but in undergrad I was an English and math major and so coming out of that, I kind of didn't know at all what I wanted to do, but I wanted to use quantitative skills and do something that would have some sort of social impact, which led me to a master's in public administration, really focused on the stats and data during that process.

As a former English major, when I heard about behavioral science and started thinking about the impact of language in context on people's behavior, I thought that was really inspiring, and so I wanted to learn more and kind of lucked into a bit because Emily was my T.A. for class, and so I heard about her awesome new job and started following the applied postings from there.

APPELT: Oh, that's amazing. And I love how you like covered all the bases. You got English, you've got math, you've got, like, very well-rounded. That's impressive.

Well, what I was hoping we could talk about today is the idea of research design in the field, because research design is a really nuanced topic, and you can read so much about it in textbook chapters, but it doesn't necessarily reflect the actual messy world of research design outside of the lab. And I thought maybe we'd start just at the beginning of that phase. Let's say we have a great idea for a BI solution. Why do we need a good research design to test the idea? What's the rationale there?

CARDON: Yeah, I think one of the realizations I had in graduate school was just how much we don't know about human behavior and policy in particular. That interaction, which I found was incredibly sobering and also incredibly exciting. You know, context is so varied and highly influential, and so even if you have something that's been, you know, an intervention or a solution, it's pretty evidence based. It often really needs to be substantially adapted to make sense for a new group of people or a new location, you know, a new context. And then on top of that time, still never stood still, right? So something that worked in 2018 might have to look really different to work in 2023 in our new world.

And so, you know, when we're at BIT, when we're trying to come up with a solution, we try as much as possible to base it on evidence, but you just really don't know if it's going to work the way that you intended when you get to the real world. And so we always advocate for at least some level of evaluation, even though that might look really different in varying levels of effort and investment that you might need to make in that evaluation. But really having some way to measure and observe whether or not the BI solution that you've designed is working the way that you intended it to.

APPELT: Yeah, absolutely. And I think we often experience that when it's a bit sobering. Sometimes we have this idea, we're like, this is amazing, this is definitely going to work. And then your testing like, oh, it doesn't quite do what I thought or cases where there's been huge surprises like recent work, we kind of often say like, oh, if it's a very straightforward change, like just simplifying language or, you know, don't need to test that. But then there are cases where simplifying language even backfires. So just like you said, that intersection of human behavior with policy or human behavior with anything is much more complicated than we might think.

So you kind of alluded to the fact that there's different types of designs out there. What makes a good research design? And are there differences between a good design in the lab and the field?

WILCOXEN: Yeah, I can start on that. So I think we tried to be really question led, so recognizing that different evaluation approaches and types of data that can answer really different kinds of questions. So a good

research design to have this framework that is meaningful, which means the answer is a question that our partners care about, is novel, and that it provides information that you wouldn't have had otherwise. And it's actionable and so gives insight that can be used in decision making. And we really try to put that question of how will this piece of information at the end of the day actually feed into a real world decision front and center. And then going through that sort of framework, we also really try to focus on and balancing rigor and the amount of resources that an evaluation will take to really try to push ourselves to be as rigorous as possible while still providing good value for how valuable the piece of information we can come up with is.

CARDON: Yeah. So I think on that, you know, that proportionality question of sort of the balance of like is this is this effort worth the rigor? You know, I think so much in behavioral sciences, we're known for pushing trials and doing RCTs, and that often works, and it often gets us to a better place where we end up with more trials than there would be in if we hadn't started from that. But there has always been a question of, we're running, somebody has to invest a lot of money to run this trial, and would it just have been better to sort of observe the outcomes at the end? Right? Like, did we actually learn something really new and actionable for how much time and effort somebody spent to set this up? And it's never a good feeling, you get to the end and it doesn't feel like you learned very much.

In terms of the tradeoff between that sort of that lab and the field. I think often... both types of research have their place. And to me it's really sort of trading between two types of rigor and it really matters like what the question or what context you're working in. So we're lab experiments, which we do a bunch of at BIT too, you often, you know, you have really high confidence that the intervention is what's causing the change and you often have a way of being able to tease out more precisely like how and why that's working the way you think it is. But it's just more unknown in terms of how that's going to translate into the real world, right? Is that like, is that magnitude really going to show up in the same way or what other variables are potentially interacting to sort of change people's behavior in either like a modifying or like an interacting way that's sort of magnifying or depressing some of the effects that you might see. So in the fields, you know, there are all of those uncontrolled variables. And as a result, it's, I think, just a lot harder to detect changes and certainly much harder to tease out how and why something is working. But the results are going to be much closer to what you're going to see at scale.

So if it's really a question of is this intervention worth the cost, you know, for implementing this like a larger population, to me, there's nothing better than being able to run a trial and to be able to answer that question. But yeah, deciding between the two to me is really just a matter of which types of questions are most important to answer first. You kind of do have to prioritize and think about risk and what pieces of information are most valuable to have at certain points in time, to be able to figure out what the right journey is going to be in sort of measurement and evaluation.

APPELT: Yeah, absolutely. And that internal validity, external validity tradeoff is often why actually it's good to do both in some projects where you do a lab study and then a follow up study in the field to confirm that, oh, it does actually work in the real world like that, or vice versa. It worked. But why did it work? So yeah, when you have the project that has the bandwidth, amazing to be able to do both pieces.

So I think you started to allude to this, but I was curious about a little more on the challenges with research designs in the real world because like you said, they're different. And so there's challenges around the internal validity piece, but maybe we can pull into that a little more.

CARDON: Yeah, I'll start and then kick it over to you, Stephanie.

So I think some of it is, so much of field research is that you just don't have the same level of control. And so data collection, implementation, people management like, it's doing, we often talk about like doing research in the real world is own behavioral insights challenge in lots of ways. So, it can be really messy and we never end up with a perfect design, and very rarely is the design that we intended to have or even we wrote up in our protocol, the one that we end up with and the sort of the project that you're analyzing at the end of the day. So, you know, where things can get really complicated is often, you aren't relying on administrative data that's already been collected. So, it's either new data that's being collected or you're having to do sort of bespoke data collection for your specific research project. That just adds a whole level of burden to the project in terms of how you're going to roll it out. Is this the right thing? What are the procedures in place for collecting all of that data? It's a whole new workflow, almost its own intervention unto itself.

I think where we've run into a bunch of challenges is, particularly for trials and really I think other evaluation designs too when you're randomizing or your data collection is really changing the process for frontline staff, you're adding to their burden of they have to report more or report differently or do something differently. That, again, is like a stakeholder behavioral... its own behavioral challenge that you have to monitor and have solutions for alongside your research design. And then, you know, where other people's behaviors and environment are going to have a big effect on their outcome. And you don't have either control or your full understanding of what that it looks like and what they're interacting with. So field work, obviously, there's always variables that you're not going to be able to measure. I think the hardest-- the things you get really nervous about is like, there's policy changes or something happening on the ground that you don't even know about. And so you can't even like, enter it into your model or think about it or asked the interview questions about it. Like you don't know what you don't know. I think that is just really hard, being that sort of dynamic thing that's changing on the ground that you really can't get your arms around.

APPELT: We had a couple examples. I can think of numerous projects where like, oh, we did run that new ad campaign in March, do you think that had a role? You're like, yes, what do you mean? Didn't we talk about like keeping everything constant during the period?

CARDON: I had a project where we often talked about, it's like a fun problem to have, where you get people excited about evaluation and doing something new and they get so excited that they keep going and you're like, no no but I wanted you to stop. I'm really glad you're excited about sending out these postcards. You were not supposed to send them out to a second batch of people, and if you did, it would've been nice to like, remove the people we already sent it to. So there's always those moments. And it's just hard if you're working in a big project and it's, you know, you're not in control. You're never going to be fully in control of all of those pieces.

WILCOXEN: Yeah. I can give a couple of examples. I do think that this is like often the really fun part, it's just like such a puzzle of figuring out where the trade offs are that you feel comfortable making, but then also how that works with your partner and their processes.

So you know, one example is we worked on a project where our goal was to help residents recycle correctly. And so we designed a flier with the recycling rules and sent it out. And on paper that could be quite simple. Like you could just get a list of addresses, randomize it, send the flier to half and then look at their recycling. But when you actually get into the details, you know, your partner is probably not able to feasibly actually look at individuals recycling. And so, in our case, the partner was actually collecting really detailed data on what was being recycled correctly or not, but it was at the recycling route level. So we think, okay, we can move up to the recycling route level. You know, that's okay for our trial sign. But then they also didn't have a list of the addresses for those recycling rates. So we had to do a very complicated sort of puzzle of trying to map it onto postal routes and then trying to also make sure that if we're selecting postal routes that we think encompass

these recycling routes, you know, is going to be balanced across the city, and do we feel comfortable that that our randomization is still good enough? So it's a very complicated sort of puzzle, even though that's a situation where you do have good data and theoretically pretty simple intervention that you're trying to send out.

And then another example that is also figuring out that randomization piece, but then kind of working within constraints of the real world was, we had a project where we wanted to randomize a fleet of busses to, some of them get a sign on them and some of them not. And again, on paper, you could just look at the list of busses, randomize it and then put the signs up. But in practice, someone actually needs to go out and install those signs. And it was our partner, Scott, who we had to be cognizant of because they have other jobs. Installing signs actually takes quite a bit of time, especially when the busses have to be continuously working. And so we had to come up with a procedure that would work for them that would be kind of balancing what we cared about, of making sure that it was as random as possible, considering the busses had like the ways that they're parked in the yard that we had to be aware of. But that also was fast enough that they weren't having to check every single bus number. And so it does get complicated pretty quickly, but it is a fun puzzle to try to figure out where you need to compromise and where you can sort of come up with a creative solution.

APPELT: Yeah. I like how you describe it as a puzzle because I think that's both a very accurate description, but also a good framing to have. So you're not thinking of it as like us versus them or anything. It's just like we both have the same goals, but we need to figure out this puzzle and we have different pieces. And even for things like sending emails, like in a lot of organizations that might be automated, but a lot of organizations like it's literally someone sending the emails. And so randomization means they have to have a list of the emails for each, each condition. And so what to the outsider might seem like, oh yeah, you just do it, you just send them, but it might actually be something that takes many staff hours to map out and then actually implement.

WILCOXEN: Yeah. On sending emails, we have like a pretty fleshed out like checklist of everything that can go wrong with that, even though it is quite simple and like all of the checks that we want to have in place to make sure it happened in the way that we expected it to. But yeah, we've been built out over quite a lot of those trials. So it is, even something relatively simple can go wrong so many ways you don't know about. Absolutely.

APPELT: Well, stepping back a bit, how do you when you're going into a project, how do you feel out for feasibility challenges to make sure you're like, which questions do you ask to make sure you're identifying challenges rather than getting surprised by them kind of partway through? How do you map that out?

WILCOXEN: Yeah. So a couple of areas that we try to ask about quite early on, first is data. So that's always a bit of a challenge. So figuring out what data is already being collected and if there is something that's already being collected, that's wonderful. But you still want to understand how reliable it is, how it might fit together. There are so many ways in which you could trust something that actually isn't being currently updated or is reflecting something that you don't think it is. And then if data is not being collected, that's what Emily sort of mentioned earlier, can be its own project in itself to figure out a good way to collect that data, that is, you can follow with fidelity, and also it's worth it for the cost of doing the data collection. And so we try to talk to the person who owns the data and also who understands and uses the data as soon as possible. We try to look at historical data polls as soon as possible, and that'll help us roll out evaluation designs pretty quickly.

Another piece that helps us kind of rule out or understand what approaches are feasible is thinking about sample size quite early on. You know, how can we actually collect data on how many people are interacting with an intervention? And then if there is a small sample being able to think about what the numbers are that we could potentially pull. So, you know, what's the timeline that we have to stick to could be collected over a longer time period. Can we change the outcome measure that we're looking at?

And then a third piece that is sort of a broader but really important one is just thinking about the stakeholders. So thinking about if we have the right people in the room and if everybody's aligned with their expectations of the project, definitely what they're hoping to get out of it. So again, going back to that sort of research question piece of making sure that you really understand what everyone wants to be able to say at the end and that you are able to get them that, or can kind of help them choose a different piece of information if it's not usable. And we do try to also just think about who are they bringing to the table and how does that likely show where the buy in already is? And that can be really helpful just to keep us from having to hunt down information all the time and to go to people for problem solving.

APPELT: And I'm curious about that last piece, because that's one that I find often has surprises, well, they all have surprises, but with the right people at the table question, a lot of times you ask and they're like, oh no, everyone who needs to be here is here. And then like a few weeks later, they're like, oh, well, you know, Paul from this corner of the data office or the legal team, oh, of course, you know, he'll have to-- and then do you have ways of structuring those initial conversations where you've kind of reduced over time the likelihood of there being a key person who who's been missing from the table?

CARDON: So I think there's a couple elements, I think in terms of team structure of like, you know, how many people are there and how they're broken up I think can really vary depending on what you're working on. I think the sort of role profiles that we always look for is there is somebody really senior. If you're in an organization, there's a senior leader there or maybe not the top person, but somebody who is not going to be involved in the day to day but really, really cares about the project and the success of the project and is going to be invested in helping to like clear roadblocks. So, you know, they're senior enough that they can elevate or help manage if there's conflicts of interest, that they're going to be able to square that out. And so just having somebody there again who's not necessarily involved on the day to day to the project, but is going to be sort of like your ally and sort of problem solving, I think is a really key position that sometimes when that person is not there or they're not as invested, it can be really tough to navigate problems when they inevitably show up. Every project is going to have those.

And then I think the other key role is like having that, whoever is going to be your lead sort of on the partner side or whoever is implementing side who is involved with you on a day to day. And I think managing that relationship and making sure that they have time and are invested in it is also really key. And then there's like a whole scope of people who can be involved at like varying levels at different times, but that you always want to see is like, whoever is controlling the data. Is it a I.T. person or is it a data analyst who is going to actually control the levers? And like, this data can be shared and this data is like being able to be pulled. It's like a very technical role. But if they don't know if like that group or that person hasn't been brought in and just made aware from the beginning, you can really catch them by surprise and honestly, just like not be very, you want to be very polite to like their time and what else they have on their schedule. And so just making sure that they've been like felt like part of the team from the beginning, I think has always been really useful.

And as you mentioned, like legal or the Ethics Office or whatever is going to sort of-- often communications teams are also a big one that comes up in our work with government, people who have to sign off on like can this intervention go out? Can this data be collected? And again, you're really going to rely on that lead and that senior stakeholder to help manage those approvals and those people. But as much as possible, if you can sort of make that a collective effort from the beginning and making sure that they sort of are doing some of that stakeholder management as you're working through some of the design questions, I think those are the big categories of people that I see being involved in our work, and when they've not been there, it's been a problem.

APPELT: Totally. Yeah. I find that that Project Champion role, like the one that is your main liaison, is really a make or break. Like without that, it's just you're, too many people with too many different priorities. You have to have someone on the client side who's really going to have the time to allocate and help push it forward.

So once you mapped out where the feasibility challenges are, how do you decide where to compromise versus where to hold the line on a decision, on a design or even where to make a no-go decision? Like we'd have to compromise so much that this wouldn't be a trial. So what criteria do you use? How do you go through that process?

CARDON: Yeah, I think the biggest bucket of things that I think that we want to get a handle on and is really hard to compromise are those ethical considerations. So we try and like think very, very carefully about what compromises need to happen there and whether or not we feel good about them. And often those are the things that sort of drive no go decisions. So I think feasibility issue means that we can't safeguard an individual's privacy or we think that the intervention is going to potentially backfire for a group of people, but we're not going to be able to detect it or see it. To me, that often is a red flag that you need to be thinking about different evaluation designs and testing things in more limited ways. So, the parallel that we often see is like, you know, drug and vaccine development is a reason they start with like very small, limited proof of concept trials and then get bigger over time. And I think the same can hold in lots of ways for, you know, behavioral insights solutions to, you know, where you may need to prototype or pilot something with a limited group. And it's not going to be a trial, you're not going to be able to measure impact, at least you'll be able to say is this safe and do we understand how to implement this in a way that is feasible and makes sense?

So I think that's the biggest category that like if I can encourage anybody, like don't hold, don't make compromises on the ethical side. It doesn't mean that we do everything like, there's always consent, right, and the consent process can't look different and that things—there needs to be practical reality as to how to run an evaluation project. But we really, really never want to sacrifice somebody's safety or wellbeing for a research project. And then after that I think often it's like it's so context driven, but going back to sort of those meaningful and novel criteria. So if the feasibility consideration means that evaluation design is no longer going to answer that central question in a meaningful way or a way that we feel confident in, it means that we need to rethink something, or if we could get the same level of confidence in that, a new piece of information using a different method, especially if it's going to be cheaper and easier, we should make a switch.

I think it can be really hard to fight against that path. Dependency really being like, let's say you are scoping a trial, you've gone down the road and you make so many concessions over time. At the end you realize you're like, wait a second, how did we get here? So I think a really key thing that we do at BIT, it's pretty standard in academic circles, is just making sure you're inviting those friendly critics to review your work because they are those people that you trust that have good judgment but haven't been involved in picking the sort of day to day considerations and trade offs and decisions that can help you just zoom out and get perspective on, okay, you're investing all this or you've designed something way too complicated. Are you sure? Are you sure this is what you want to do or you are running a very expensive trial to answer something that you're not powered to do, like you're not going to be able to be powered for this at the end. Is that really a good use of your resources and your clients resources and your partner's time? I think one of the hardest things is timing those conversations at the right time. So you haven't already made a decision that is, you know, you can't walk back from. But I think you can sort it out in conversations lots of times.

APPELT: Yeah. And I think that to me also echoes that, one thing that's been helpful for me is building in like decision points, because with sunk costs, a lot of times we just like, oh, we'll just keep going. And then if you build in like, okay, this is where we need to take a step and reflect and get outside input or something, then it gives you that opportunity to evaluate and not just continue sliding along.

And then the other thing I wanted to pull on there is just the idea that, I think if you're new sometimes and the client says, oh, we can't do that, you might treat it as a firm no rather than kind of exploring the reason behind and if you treat it more as a back and forth, you might find out the why. And then it's, oh, actually we can change this part of it, it's just this other part we can't change. And then you can get into finding out what's really fixed and what's flexible. I remember one of the projects a student team did where they sent in their mockup and the design team came back with something that just basically crossed the condition so that every condition had every element in it. And they were just like, okay, I guess this is what we're doing. It's like, no, no, we can go back to the design team and ask, you know, what their rationales were. And then we found out that it's just that they were using, you know, this framework and blah, blah, blah. And so then we were actually able to get something that worked in the end. But until you've been in a few of these conversations, it can be difficult to figure out when do you ask those questions about like, well, which parts of this are fixed and what's the reason we can't do this. I don't know if that resonates for you at all.

CARDON: Totally. I think that like it goes back a little bit to what Stephanie was saying about a puzzle is like, I think approaching it like a collaborative effort rather than a negotiation. Like, it's not a negotiation. Like if you don't treat it that way, I think as you're sort of suggesting like asking questions and trying to lift the veil on what their process and what their thinking is. You know, I think the place that this is often happening most for us is legal, right? Like, legal will talk to you like it's a negotiation, right? And that they have approval and it's often they don't have direct approval, but you do want their sign off, and so just getting them to like sort of explain like why or just to give them options about like, okay, what if we did this or this or this, would that change your answer in any particular way? And I think that's just always been a very helpful tactic.

I remember specifically a project where we were working with the city and what we wanted to test was like a letter notification about, I don't know if it was a deadline to register for something, something like that. And it was going to be letter versus no letter as what we wanted to test. And the legal office in the city said, no, you can't do this, this is differential enforcement, right? So you can't-- you're differentially enforcing this deadline with some group versus the other. And it was like a pretty harsh, you know, the way they approached is a really hard no. And we were back and we're like, oh, but like, what if we just, you know, if it's the timing of the letters is randomized, right? So we're going to send out the one batch and then we're going to wait and they're going to send out another batch. Does that change your answer? And they were like, yeah, that's fine. We're like, okay. It was sort of surprising by how like how easily it works to given their original stance. But yeah, people in these other positions, they're not thinking like you in an evaluation trial. They don't understand why you're making the decisions you're making.

I think, Kirstin, what you're saying is like the design people, they always want to come up with, like it's just different iterations, right? You can sort of like get a range of different options and then they sort out like what you're responding to from there. Just so different as from a scientist coming up with like, okay, use these clean, clean, totally separate ideas and concepts. Use a totally different framework to be thinking about, how do you make a solution concept? And I think we have a lot to learn from one another and our approaches, but you do have to just ask a lot of questions, I think, and be iterative about it.

APPELT: Yeah, and kind of going back to what Stephanie said at the very beginning with her English background sometimes too, just because we are coming from different backgrounds and we have our different jargon and the same term like research for us might mean something different for them, or experimentation. And so we had one project where we learned like if we just didn't use the word research, it really like gave us a lot of might because that was like a no-no word for them. So, you know, just getting on to the same page, I often have like a little jargon one pager for each organization I'm working with about, like, these are the terms they use so make sure to use these or not those.

WILCOXEN: I really want to test some of this of, like, what is the difference between trial and pilot? Like they mean something to us, so they're very different, right? But like, they don't mean the same thing to people externally, and I think people love the word pilot and really dislike the word trial. So yeah, I think over time you get you get a sense of like, what words are these people using? And let me mirror back in the jargon that they're using and then stay away from scary jargon.

APPELT: Totally. Well, I know we are limited on time today, but one of the questions I wanted to make sure we had time for is, what tips do you have for research design?

CARDON: I think, Stephanie, you talked about this a little bit about being question led. And I think that this is always, if I have one word of advice, is always, always start with what your research objectives and questions are and then have the design follow from that rather than trying to like fit a question to the method that you have in mind. And so this really comes from experience with us, like we I think learned the hard way of like always trying to pitch doing a trial and running an impact evaluation. And then we found what that was doing is like sometimes limiting the interventions that we ended up wanting to test, right? So that we would end up in a place where we were testing something and intervention that we thought maybe wasn't going to be as impactful, but we knew that we could evaluate using a pretty clean randomized trial, and that just doesn't feel good over time. You realize even why am I keep ending up with letter trials when we think that we have we have so much more to offer? And then just having to be really flexible, of saying, okay, what do we think is going to work? What should we test? What is the partner interested in? What are our constraints? And then going from there of which of these questions do we think we want to answer? I really maintain that.

I think that there is always an evaluation, like you can always design an evaluation and it may not be the evaluation you wanted, but there's something you can do to be able to learn something useful. And so just making sure that you're keeping an open mind and it's okay if you need to switch your approach, even if you talk to the client about an RCT and you realize like, okay, you have 30 people, this wasn't what we thought, that there's a way to pivot and give something that's useful to them.

APPELT: Totally. That reminds me too of when I was teaching research methods. I would often suggest backward research where you think you run it forward and then you run it backwards. You think at the end of this, what conclusion do I want to be able to have? And then what design would get me there, what solution? So running it forward and then backward to check it before you kind of launch.

WILCOXEN: Yeah, we definitely like that as well. And trying to think about like, if I get a positive result, a negative result or a null result, like at the end of this being in the world where all three of those are useful is definitely where you want to be. And I think that avoids some underpowered trials where you're like, I got to now, I think I just feel bad about how I set this up. That's usually not a good sign.

The other tip that kind of, I think, ties to the last conversation is that there are really always trade offs. And so being able to be transparent and talk about those trade offs without a lot of jargon to your partners is so important because it's often slightly altering the question that you're going to answer, slightly altering that piece of information you'll have at the end, or adding some sort of caveat. And while you might be able to say what those slight changes are based on your sort of knowledge of how the evaluation should be set up or what the implications of some of those decisions are, your partners are often the ones with the real world or policy experience who can say that question is still valuable to me or that question isn't? And so really just sort of thinking of yourself as a bridge and recognizing that both sides of that puzzle are how you get to a meaningful evaluation. I think this is a really important skill to build up.

APPELT: Absolutely. I think like we said, it comes back to this idea of collaboration and co work. It's not us versus them or anything else, it's all very, everyone's on the same side of the table trying to get to the same place, but bringing their different toolkits and background, knowledge and jargon, all of which is extremely useful. But it can be friction at times when you are speaking different languages or using different approaches more regularly.

Well, our traditional last question is just if you have a message for our new BI practitioners in training?

CARDON: I mean, I think it actually just stems from what you were just saying. I can't imagine doing this work without a team. I think there is always something new to learn and one person can't possibly have all the knowledge and skills that are needed in order to make a behavioral insights project a success. So whether you're coming with, you know, an evaluation or statistics background or quantitative background, policy knowledge, lived experience, you know, all of those are really valuable and will help make a project a better one. And if there's one thing that behavioral science teaches us is that we all have perspectives that influence our perceptions and thinking, and so inviting others to help find and fill our blind spots is really invaluable. So I really encourage everybody to go find their community and work in a space where you feel like you have trusted and positive collaborative relationships, where you can work on these things in community with one another. I think, yeah, I just I couldn't, I couldn't do this by myself, A, It would be no fun and B, it would be not a success. So I think finding out how to do that work in a group I think is my advice.

APPELT: Yeah. I love how I think BI is a really big umbrella and then it's really nice because everyone can be under the umbrella together. It doesn't feel mutually exclusive or anything like that. It's just, oh, you have another perspective. Bring it under the umbrella, we'd love to have it.

Stephanie, what about you? Any last thoughts from you?

WILCOXEN: I think just echoing that as well. I think it's just very true that a lot of this is like creative thinking or problem solving. And so while there are technical skills that are certainly important and if that's something that you get really excited about, same, so, you know, welcome. But a lot of it is like, I think quite accessible to people of different backgrounds. And we both have nonstandard backgrounds to get to where we are right now, but it is just a lot of, you know, working with other people, seeing what they bring to the table, trying to come up with solutions to logistics problems or coming up with ways that something might fail and having a discussion about that with someone else. So I think it is something that takes a lot of different skill sets.

APPELT: Yeah. We're all puzzled by human behavior because we're humans ourselves. So we all have that uniting us in our drive. Well, thank you both so much. I have long been an admirer of BIT, but now I'm an admirer of both of you as well, so it's been really a treat to talk shop today. And it's like you just said, we're all nerds here, and it's great to nerd out about research design. And I can't wait to see what else you continue to do. And BIT's always advancing the field and tackling important challenges, so I can't wait to hear what new ways of evaluation you all continue to innovate. So thank you both for joining today.

CARDON & WILCOXEN: Thanks for having us.

APPELT: And thanks to our listeners for joining another episode of Calling DIBS.