

# The Hexagon: An Exploration Tool

Adapted for use with The Matrix: A guide to delivering evidence-based psychological practice in Scotland



## Hexagon Discussion & Analysis Tool Instructions

Adapted by NHS Education for Scotland  
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Metz, A. & Louison, L. (2019) The Hexagon Tool:  
Exploring Context. Chapel Hill, NC: National  
Implementation Research Network, Frank  
Porter Graham Child Development Institute,  
University of North Carolina at Chapel Hill.  
Based on Kiser, Zabel, Zachik, & Smith (2007)  
and Blase, Kiser & Van Dyke (2013).

# Hexagon Discussion & Analysis Tool Instructions

The Hexagon Discussion and Analysis Tool helps organisations evaluate new and existing programmes and practices. This tool is designed to be used by Implementation Teams to facilitate a discussion of six contextual fit and feasibility indicators.

## PROGRAMME INDICATORS

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Program indicators assess new or existing programmes or practices that will be implemented along the following domains: usability, supports and evidence. These indicators specify the extent to which the identified programme or practice demonstrates usability across a range of contexts, supports for implementation, and evidence.

## IMPLEMENTING SITE INDICATORS

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Implementing site indicators assess the extent to which a new or existing programme or practice matches the implementing site along the following domains: fit, capacity and population need. The assessment specifies suggested conditions and requirements for a strong match to fit, capacity and need for the identified programme or practice.

## WHEN TO USE

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The Hexagon Tool can be used at any stage in a programme's implementation to determine its fit with the local context. It is most commonly used during the Exploration stage when implementing sites are identifying possible new programs or practices. If the organisation has an Implementation Team, the Implementation Team can carry out this function for the organisation.

## HOW TO USE

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### PRIOR TO USING

- 1 Identify the programme or practice to be assessed.
- 2 Review the discussion questions prior to meeting to ensure any data or resources that need to be reviewed for this discussion are available. If appropriate, an organisation may prioritise components for deeper exploration based on the context and potential programmes or practices.
- 3 This tool should be used by a team to ensure diverse perspectives are represented in discussion. Suggested team members include leaders, managers, direct practitioners and consumers or community members.

### DURING USE

- 1 The Implementation Team should review and discuss the questions for each indicator and document relevant considerations in the Notes column. Extra space is included in each section for additional questions identified by the Implementation Team to address unique needs and contexts.
- 2 After discussing each component, the Implementation Team rates the component using the 5-point Likert scale and indicators in each section.
- 3 Using the discussion notes and ratings, the Implementation Team makes recommendations about whether to adopt, replicate, or de- implement the programme or practice. While ratings should be taken into account during the decision- making process, the ratings alone should not be used to determine final recommendations.

# The Hexagon: An Exploration Tool

The Hexagon can be used as a planning tool to guide selection and evaluate potential interventions and practices for use.

## IMPLEMENTATION SITE INDICATORS

### NEED

Target population identified  
 Disaggregated data indicating population needs  
 Parent & community perceptions of need  
 Addresses service or system gaps

### CAPACITY TO IMPLEMENT

Staff meet minimum qualifications  
 Able to sustain staffing, coaching, training, data systems, performance assessment, and administration

- + Financially
- + Structurally
- + Cultural responsiveness capacity

Buy-in process operationalised

- + Practitioners
- + Families

### FIT WITH CURRENT INITIATIVES

Alignment with community, regional, state priorities.

Fit with family and community values, culture and history

Impact on other interventions & initiatives

## PROGRAMME INDICATORS

### USABILITY

Well-defined programme  
 Mature sites to observe  
 Several replications  
 Adaptations for context

### SUPPORTS

Expert Assistance  
 Staffing Training  
 Coaching & Supervision  
 Racial equity impact assessment  
 Data Systems  
 Technology Supports (IT)  
 Administration & System

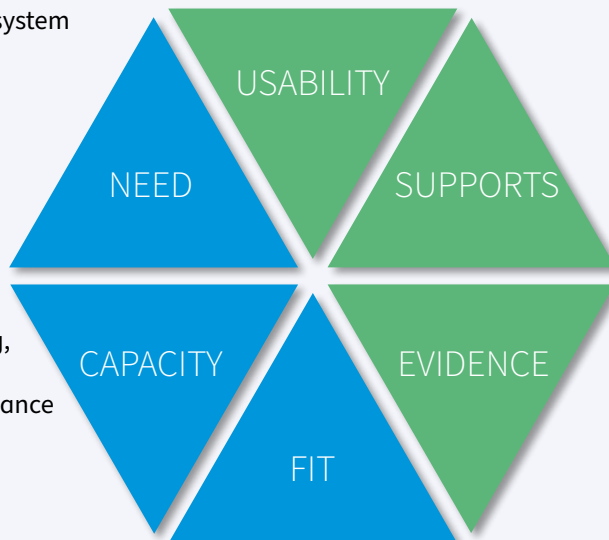
### EVIDENCE

Strength of evidence - for whom in what conditions:

- + Number of studies
- + Population similarities
- + Diverse cultural groups

Alignment with organisational structure

Efficacy or Effectiveness



Facilitator(s):

Today's Date:

Practice/Programme Being Assessed:

Individuals Participating in the Assessment:

Identify the programme or practice to be assessed. Write the numerical rating that best describe each component below.

	PROGRAMME/ PRACTICE	<b>1</b>	PROGRAMME/ PRACTICE	<b>2</b>	PROGRAMME/ PRACTICE	<b>3</b>
<b>PROGRAMME</b>	USABILITY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	SUPPORTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	EVIDENCE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>IMPLEMENTING SITE</b>	FIT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	CAPACITY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	NEED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 1 Is the intervention or practice clearly defined (e.g. what it is, for whom it is intended)?
- 2 Are core features of the intervention or practice identified, listed, named (e.g. key components of the intervention or practice that are required in order to be effective)?
- 3 Is each core feature well operationalised (e.g., staff know what to do and say, how to prepare, how to assess progress)?
- 4 Is there guidance on core features that can be modified or adapted to increase contextual fit?
- 5 Is there a fidelity assessment that measures practitioner behaviour (i.e. assessment of whether staff use the practice as intended)? If yes, provide citations, documents, or links to fidelity assessment information.
- 6 Has the intervention or practice been adapted for use within culturally and linguistically specific populations and/or is there a recommended process for gathering community input into culturally specific enhancements?
- 7 What do we know about the key reasons for previous successful replications?
- 8 What do we know about the key problems that led to unsuccessful replication efforts previously?
- 9 Are there mature sites with successful histories of implementing the intervention or practice who are willing to be observed?

### Ratings

**5 Highly Usable**

The intervention has operationalised principles and values, core components that are measurable and observable, a fidelity assessment, identified modifiable components

**4 Usable**

The intervention has operationalised principles and values, core components that are measurable and observable, tools and resources to measure fidelity, and identified modifiable components

**3 Somewhat Usable**

The intervention has operationalised principles and values and core components that are measurable and observable but does not have a fidelity resource; modifiable components are not identified

**2 Minimally Usable**

The programme or practice has identified principles and values and core components; however, the principles and core components are not defined in measurable or observable terms; modifiable components are not identified

**1 Not Usable**

The intervention does not identify principles and values or core components

Additional Questions/ Notes

- 1 Is there a qualified “expert” (e.g. consultant, programme developer, technical assistance provider) who can help with implementation over time? If yes, list names and/or organisation (e.g. Centre, University) and contacts.
- 2 Are there start-up costs for implementation of the intervention or practice (e.g. fees to the programme developer)? If yes, itemise in notes section. What does the implementing site receive for these costs?
- 3 Are there curricula and other resources related to the intervention or practice readily available? If so, list publisher or links. What is the cost of these materials? Enter in notes section.
- 4 Is training and professional development related to this intervention or practice readily available? Is training culturally sensitive? Does it address issues of race equity, cultural responsiveness or implicit bias? Include the source of training and professional development. What is the cost of these materials? Enter in notes section.
- 5 Is coaching available for this intervention or practice? Is coaching culturally sensitive? If so, list coaching resources and cost in notes section.
- 6 Are sample job descriptions and interview protocols available for hiring or selecting new staff for this practice? If so, identify here and any costs associated.
- 7 Is guidance on administrative policies and procedures available? If so, identify resources and any costs associated.
- 8 Are there resources to develop a data management plan for this intervention or practice (including data system and monitoring tools) available? If so, identify resources and any costs associated.
- 9 Is there a recommended orientation to facilitate “buy-in” for staff, key stakeholders and collaborative partners? If so, explain/describe briefly in notes section.

### Ratings

**5 Well Supported**

Comprehensive resources are available to support implementation, including resources for building the competency of staff and organisational practice as a standard part of the intervention

**4 Supported**

Some resources are available to support implementation, including at least limited resources to support staff competency and organisational changes as a standard part of the intervention

**3 Somewhat Supported**

Some resources are available to support competency development or organisational development but not both

**2 Minimally Supported**

Limited resources are available beyond a curriculum or once-off training

**1 Not Supported**

Few to no resources to support implementation

Additional Questions/ Notes

- 1** Are there research data available to demonstrate the effectiveness (e.g. randomised trials, quasi-experimental designs) of the intervention or practice? If yes, provide citations or links to reports or publications.
- 2** What is the strength of the evidence? Under what conditions was the evidence developed?
- 3** What outcomes are expected when the programme or practice is implemented as intended? How much of a change can be expected?
- 4** If research data are not available, are there evaluation data to indicate effectiveness (e.g. pre/post data, testing results, action research)? If yes, provide citations or links to evaluation reports.
- 5** Is there practice-based evidence or community-defined evidence to indicate effectiveness? If yes, provide citations or links.
- 6** Is there a well-developed theory of change or logic model that demonstrates how the intervention or practice is expected to contribute to short term and long-term outcomes?
- 7** Do the studies (research and/or evaluation) provide data specific to the setting in which it will be implemented (e.g., has the intervention or practice been researched or evaluated in a similar context)?  
If yes, provide citations or links to evaluation reports.
- 8** Do the studies (research and/or evaluation) provide data specific to effectiveness for culturally and linguistically specific populations? If yes, provide citations or links specific to effectiveness for families or communities from diverse cultural groups.

## Ratings

### **5 High Evidence**

The intervention has demonstrated evidence of effectiveness based on at least two rigorous, external research studies with the focus population and control groups, and has demonstrated sustained effects at least one year post treatment.

### **4 Evidence**

The intervention has demonstrated effectiveness with one rigorous, external research study with the focus population and a control group.

### **3 Some Evidence**

The intervention shows some evidence of effectiveness through less rigorous research studies with the focus population and comparison groups.

### **2 Minimal Evidence**

The intervention is guided by a well-developed theory of change or logic model for the focus population and has demonstrated a relationship between the program or practice and outcomes based on an evaluation or practice-based evidence.

### **1 No Evidence**

The intervention does not have a well-developed theory of change or logic model and has not demonstrated a relationship between the program or practice and outcomes based on an evaluation or practice-based evidence.

Additional Questions/ Notes



- 1 How does the intervention or practice fit with priorities of the implementing site?
- 2 How does the intervention or practice fit with family and community values in the impacted community, including the values of culturally and linguistically specific populations?
- 3 What other initiatives currently being implemented will intersect with the intervention or practice?
- 4 How does the intervention or practice fit with other existing initiatives?
- 5 Will the other initiatives make it easier or more difficult to implement the proposed intervention or practice and achieve the desired outcomes?
- 6 How does the intervention or practice fit with the community's history?

### Ratings

**5 Strong Fit**

The intervention fits with the priorities of the implementing site; local community values, including the values of culturally and linguistically specific populations; and other existing initiatives

**4 Fit**

The intervention fits with the priorities of the implementing site and local community values; however, the values of culturally and linguistically specific population have not been assessed for fit

**3 Somewhat Fit**

The intervention fits with the priorities of the implementing site, but it is unclear whether it aligns with local community values and other existing initiatives

**2 Minimal Fit**

The intervention fits with some of the priorities of the implementing site, but it is unclear whether it aligns with local community values and other existing initiatives

**1 Does Not Fit**

The intervention does not fit with the priorities of the implementing site or local community values

Additional Questions/ Notes

- 1 Typically, how much does it cost to run the intervention or practice each year? Are there resources to support this cost? If the current budget cannot support this format, outline a resource development strategy.
- 2 What are the staffing requirements for the intervention or practice? (Number and type of staff, e.g., education, credentials, content knowledge)
- 3 Does the implementing site currently employ or have access to staff that meet these requirements?
- 4 If so, do those staff have a cultural and language match with the population they serve, as well as relationships in community?
- 5 What administrative practices must be developed or refined to support the use of this intervention or practice?
- 6 Is leadership knowledgeable about and in support of this intervention or practice? Do leaders have the diverse skills and perspectives representative of the community being served?
- 7 Do staff have the capacity to collect and use data to inform ongoing monitoring and improvement of the intervention or practice?
- 8 What administrative policies or procedures must be adjusted to support the work of practitioners and others to implement the intervention or practice?
- 9 Will the current communication system facilitate effective internal and external communication with stakeholders, including impacted families and the community?
- 10 Will the intervention or practice require use of or changes to building facilities? Use notes section to explain. List required uses of and/or changes. Include costs if known.
- 11 Does the intervention or practice require new technology (hardware or software, such as a data system)? Use notes section to explain. List required hardware and/or software. Include costs if known.
- 12 Does the intervention or practice require use of or changes to the monitoring and reporting system? Use notes section to explain. List required uses of and/or changes. Include costs if known.

## Ratings

### 5 Strong Capacity

Implementing site adopting this intervention has a qualified workforce and all of the financial supports, technology supports, and administrative supports required to implement and sustain the intervention with integrity

### 4 Adequate Capacity

The implementing site adopting this intervention has most of the capacity necessary, including a qualified workforce, financial supports, technology supports, and administrative supports required to implement and sustain the intervention with integrity

### 3 Some Capacity

The implementing site adopting this intervention has some of the capacity necessary, including a qualified workforce, financial supports, technology supports, and administrative supports required to implement and sustain the intervention with integrity

## Ratings (continued)

### **2 Minimal Capacity**

The implementing site adopting this intervention has minimal capacity necessary, including a qualified workforce, financial supports, technology supports, and administrative supports required to implement and sustain the intervention with integrity

### **1 No Capacity**

The implementing site adopting this intervention does not have the capacity necessary, including a qualified workforce, financial supports, technology supports, and administrative supports required to implement and sustain the intervention with integrity

Additional Questions/ Notes

- 1 Who is the identified population of concern?
- 2 What is/are the identified needs of this population?
- 3 Was an analysis of data conducted to identify specific area(s) of need relevant to the intervention or practice? If yes, what data were analysed? Were these data disaggregated by race, ethnicity and language?
- 4 How do affected individuals and community members perceive their need? What do they believe will be helpful?  
How were community members engaged to assess their perception of need?
- 5 Is there evidence that the intervention or practice addresses the specific area(s) of need identified? If so, how was this evidence generated (e.g., experimental research design, quasi-experimental research design, pre-post, descriptive)?
- 6 If the intervention or practice is implemented, what can potentially change for this population?

## Ratings

### 5 Strongly Meets Need

The intervention has demonstrated meeting the need for the identified population through rigorous research with a comparable population; data demonstrates the intervention meets the need of specific subpopulations

### 4 Meets Need

The intervention has demonstrated meeting need for the identified population through rigorous research with a comparable population; data has not been analysed for specific subpopulations

### 3 Somewhat Meets Need

The intervention has demonstrated meeting need for the identified population through less rigorous research design with a comparable population; data has not been analysed for specific subpopulations

### 2 Minimally Meets Need

The intervention has demonstrated meeting need for the identified population through practice experience; data has not been analysed for specific subpopulations

### 1 Does Not Meet Need

The intervention has not demonstrated meeting need for the identified population

Additional Questions/ Notes

## ALTERNATIVE FORMATS

This resource may be made available, in full or summary form, in alternative formats and community languages. Please contact us on **0131 656 3200** or e-mail: **altformats@nes.scot.nhs.uk** to discuss how we can best meet your requirements.



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