Using a strategic learning agenda to drive action and program success

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Dibble Institute Webinar Series
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Goals for Today

Participants will:

- Familiarize themselves with learning agendas
- Learn how to turn a learning agenda into a strategic learning plan
- Understand how to use that plan to create action and inform decisions
Project Evident harnesses the power of evidence for greater impact.

We believe that by empowering practitioners to drive their own evidence building and strengthening the surrounding ecosystem, we can increase the number of effective solutions in the social sector and scale them faster—ultimately producing better outcomes for communities.
Building the Next Generation of Evidence

- We put practitioners at the center of evidence building.
- We connect this work to sustainable support from informed and aligned funders, policy makers, and researchers.
Part 1: How can learning agendas support evidence building and strategy?
Let’s start our conversation at the level of a whole organization
What is a learning agenda?

A learning agenda is a set of questions that guides an organization’s measurement, evidence-building and continuous improvement strategy.

Builds on organizational strategy, theory of change, and logic models

States hypotheses and assumptions about how activities and outputs will produce outcomes

Surfaces gaps in knowledge and evidence

<table>
<thead>
<tr>
<th>Learning Questions</th>
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<tbody>
<tr>
<td>Prioritize what you need to learn and where you need to build evidence to demonstrate impact, to advance strategic objectives, and to inform decision making for continuous improvement</td>
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<table>
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<tr>
<th>Evidence Activities</th>
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<tr>
<td>This supports identification of evidence building activities that can help answer the questions</td>
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Evidence =

Data + Analysis

to inform decision making
What makes a strong learning agenda?

A good learning agenda provides a “narrow set of energizing, forward-looking, action oriented strategic questions that, if answered, could make a real difference in the work.” (T. Beer, CEI)

A learning agenda can support your work by:

- Ensuring that a measurement strategy is collecting the data needed to drive decisions
- Clarifying what knowledge the organization should be collecting and storing in an ongoing way
- Aligning within and across teams and with community on when and how data is collected and analyzed
- Providing the team with a plan to focus the analysis of performance monitoring data
- Identifying needs for evaluative activities outside of regular performance monitoring
We can follow a simple process to define a learning agenda

With this conversation, we will start a process to determine your learning agenda questions at each level of strategy. At each step in the process, we can be attentive to equity and organizational values.

**Brainstorm & Surface Priorities**
Identify questions, and surface those that are the most pressing

**Sharpen & Align Questions**
Analyze questions, create actionable formulation, ensure values alignment

**Develop Measurement Strategy & Learning Plan**
Connect learning questions to measurement and the “who” and “when” of learning and decision making
Brainstorm & Surface Priorities

We can approach a learning agenda by **understanding your goals for developing evidence.** We often call this “**Evidence to what end?**”

<table>
<thead>
<tr>
<th><strong>Impact</strong></th>
<th>Demonstrate program impact on target outcomes; understand impact of program components</th>
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<tbody>
<tr>
<td><strong>Improvement</strong></td>
<td>Optimizing and codifying programs and best practices; testing innovations for continuous improvement</td>
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<tr>
<td><strong>Scale</strong></td>
<td>Expanding reach to serve larger numbers, new populations or communities while sustaining impact</td>
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<tr>
<td><strong>Sustainability</strong></td>
<td>Developing evidence to attach to public and/or private resources; diversifying funding streams</td>
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<tr>
<td><strong>Systems</strong></td>
<td>Use evidence to advocate for policies and systems affecting target populations</td>
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Sharpen & Align Questions

How we will think about prioritizing, sharpening and aligning questions?

☐ **USEFULNESS: How actionable?**
Does it produce knowledge that is crucial for your “prove” and “improve” objectives? Can the answers help you drive strategic and programmatic decision making, and goals around becoming an anti-racist organization?

☐ **EFFORT: How difficult?**
Can it be answered with planned data collection? Can data collection leverage existing touchpoints? How burdensome is data collection?

☐ **VALIDITY: How credible?**
Can you accurately measure what you’re trying to measure? What level of rigor can you reach without an external evaluation or a comparison group? How many factors would you need to control for to have confidence in the results?
Evidence and evaluation approaches should be selected to address your learning needs and objectives. **Your approach can be “fit for purpose,”** giving you the right information for strategic decisions.

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<th>Sustainability</th>
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<tbody>
<tr>
<td>Summative evaluation</td>
<td></td>
<td>Performance monitoring</td>
<td>Data and narrative for different audiences on needs of communities and participants, efforts in continuous improvement, and program impact</td>
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<td>Outcome and implementation analysis</td>
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<td>Formative evaluation</td>
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<td>Rapid cycle testing</td>
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<td>Codification and documentation</td>
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<td>Dashboards</td>
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Some examples of good questions...
Example learning agenda questions

Learning agendas can support different levels of strategy, but the guiding questions will be different at each level. Below are anonymous examples from past work.

Which approaches may be unintentionally upholding values, tactics or strategies in the ecosystem that reinforce inequities?
Example learning agenda questions

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Organizational

Which approaches may be unintentionally upholding values, tactics or strategies in the ecosystem that reinforce inequities?

Programmatic

What components of the program model (workshops, expert feedback and guidance, peer network, benchmarking information on outcomes and program models, etc.) do leaders find most helpful for their work and why?
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What components of the program model (workshops, expert feedback and guidance, peer network, benchmarking information on outcomes and program models, etc.) do leaders find most helpful for their work and why?

**Operational**

What internal capacity and technical assistance is necessary to implement the pilot? What is the total cost of the pilot in terms of staff and contracted hours?
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**Operational**
What internal capacity and technical assistance is necessary to implement the pilot? What is the total cost of the pilot in terms of staff and contracted hours?
These questions can support planning for learning

After formulating or adapting a learning agenda, steps can be taken to realize its benefits by connecting to the opportunities we discussed above.

- Is the measurement strategy collecting the data needed to drive decision making?
- Has the knowledge the organization should be collecting and storing in an ongoing way been clarified?
- Is there alignment within and across teams and with community on when and how data is collected and analyzed?
- Does the team have a plan to focus the analysis of performance monitoring data?
- Has the team identified needs for evaluative activities outside of regular performance monitoring?
Putting a learning agenda into action
Developing a Learning Plan

**Hypothesis**

Based on the question, what are you testing?
**Capture:** A good yes/no question that contributes information.

**Data**

What information are you collecting?
**Capture:** Data points & data collection tools you need.

**Who**

Determine who needs to review the data. Who should be able to talk about it?
**Capture:** List of people to review the information with a focus on equity.

**When**

Determine the meetings or venues for discussion.
**Capture:** Meetings or list of meetings for input

**Decision**

Document a decision that this learning plan is supporting
**Capture:** The decision that will be made at the end
Below is an example Strategic Learning Plan adapted from The Coaching Program (TCP).

How well are we programmatically contributing to progress on our North Star?

What hypothesis are we testing?
Coaches who demonstrate good progress on developing coaching competencies will have a positive impact on the leadership skills of the coachees they work with during the program.

What indicators/data points do we need?
- Coach progress on competencies
- Coachee progress on leadership goals
- Feedback from key stakeholders on coachee's leadership competencies

Who reviews the data?
- TCP team + org faculty
- Coaches-in-training
- Coachees

When to review
- End of cohort 2

Relevant decision(s)
- Evaluate potential of TCP to deliver its ultimate aim/key impact - leadership development
- Accordingly, assess if curriculum or mode of delivery should be modified, program should be scaled or discontinued

Do TCP participating coachees demonstrate increased leadership competencies relative to their goals?

What data collection tools + frequency is necessary?
- [Annual] Coachee leadership competences self-assessment
- [Semi annual] Coach's ratings
- [3 times over 3 years] Key stakeholders’ survey
- Coachee/leadership goals

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How well are our programs contributing to positive outcomes for individuals and communities?

What data collection tools + frequency is necessary?
- [Annual] Coachee leadership competences self-assessment
- [Semi annual] Coach's ratings
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Part 2: A practical tool for answering a targeted question
Applying the principles of a learning agenda to a single decision...

Our goal is to put a simple tool in your hand to guide your thinking for using data for emergent decisions. A few things to keep in mind...

- If you are sophisticated at this, this may be helpful for how you guide others.
- If you feel less confident in structuring learning around a specific question, this may be helpful to you individually.
# Step 1: Establish Evidence Goal

## What decision are you trying to make or support?
For example, should we direct resources from one program or part of the community to another?

<table>
<thead>
<tr>
<th>What decision are you trying to make or support?</th>
<th>By when?</th>
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## What do you need to know in order to make your decision?
List what you need to know as questions, and write down as many questions that come to mind without pausing to answer, analyze, or judge.

1. 
2. 
3. 
4. 
5. 
6. 

<table>
<thead>
<tr>
<th>What do you need to know in order to make your decision?</th>
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</table>

## From the list of questions above, write the one question that is highest priority.
This question is critical to answer before you can make the decision you are grappling with.

### Brainstorm the supporting questions you have to answer

### What is a top of mind question for you right now?

### When do you need to answer it?

### Identify a single priority, this may be hard to do!
Step 2: Capacity Review

Answer this for internal, external and totally new data...

It will be helpful to do this in order.

Think about how you can pull it, and analyze it.

We are trying to help you capture your “gaps” in data and analysis capability.

<table>
<thead>
<tr>
<th>Evidence Capacity</th>
<th>Determine your organizational capacity to collect the data to make your decision.</th>
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<tbody>
<tr>
<td><strong>Internal Data:</strong></td>
<td>What data do you hold that is critical (timely, pertinent) for the decision?</td>
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<tr>
<td></td>
<td>Do you have the capacity to analyze all of it?</td>
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<tr>
<td></td>
<td>Yes / No</td>
</tr>
<tr>
<td><strong>External Data:</strong></td>
<td>Can data that others hold that is critical for the decision?</td>
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<td></td>
<td>Are you able to access and analyze all of it?</td>
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<tr>
<td></td>
<td>Yes / No</td>
</tr>
<tr>
<td><strong>New Data:</strong></td>
<td>What data would be good to get that you do not currently have that is critical for the decision?</td>
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<tr>
<td></td>
<td>Do you have a process for getting all of it?</td>
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<td></td>
<td>Yes / No</td>
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A: If not, what resources do you need to complete the analysis?
B: If not, what resources do you need to complete the analysis?
C: If not, what resources do you need to complete the analysis?
Step 3: Plan Development

Now, we'll step through the internal, external, and new data gaps, and help think about how to close the gaps.

<table>
<thead>
<tr>
<th>Evidence Plan</th>
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<tbody>
<tr>
<td><strong>Make a plan to analyze, access, and process the data to make your decision.</strong></td>
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<thead>
<tr>
<th><strong>Internal Data:</strong> Looking at Box A above, what partners can you access to analyze the data? Are there team members you can task with analysis?</th>
<th>What is the immediate next step(s)?</th>
<th>Who will own it?</th>
<th>What do you estimate it will cost?</th>
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**External Data:** Looking at Box B above, who owns the data? Are there existing relationships you can leverage to access the data?

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<tr>
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**New Data:** Looking at Box C above, can you or an existing partner structure a survey, focus group, or short research project?

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<tr>
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We will think through immediate next steps, owners, and potential cost (staff time, consultants, partners, etc.)
Strategic Evidence Planning in Practice: Summer Learning Network

About Summer Learning Network

- Supports a network of tuition-free academic and enrichment programs serving children from low-income communities.

How did COVID change their work?

Affiliates rapidly modified their summer programming to continue to engage students - but each affiliate adapted differently.

- Mode of program delivery
- Types of academic content
- Emphasis on mental and physical health
- Provision of meals

What decision does SLN need to make?

Do we continue to track program quality data for the Summer of 2020?
Feel free to shoot us questions that you have as you use the tool.
Remember, a learning agenda is not static, and is not an end in itself. Rather, it is a means to surface evidence for decision making.
Questions?
Comments?