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# Using a strategic learning agenda to drive action and program success

Gabriel Rhoads  
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## Goals for Today



### **Gabriel Rhoads**

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Evaluation Services  
Project Evident

### 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

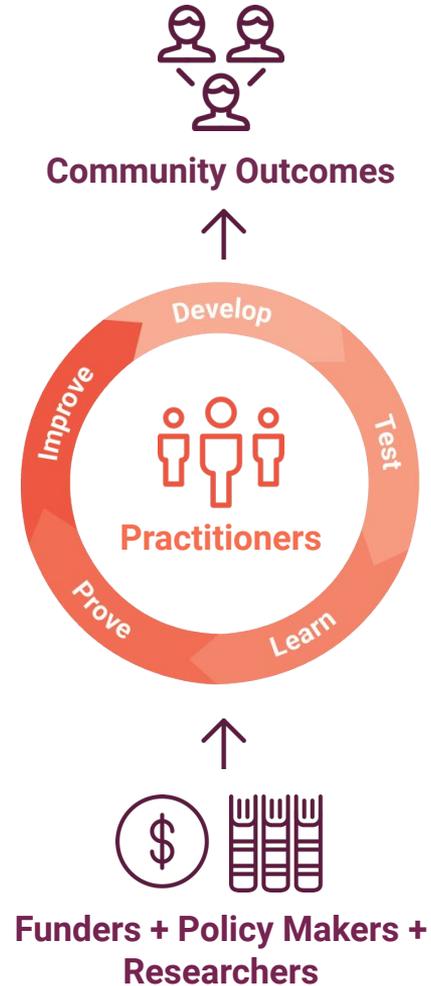
**Project Evident harnesses the power of evidence for greater impact.**

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**



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## 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



### Learning Questions

**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

### Evidence Activities

This supports identification of evidence building activities that can help answer the questions

**Evidence =**

**Data + Analysis**

**to inform decision making**



## What makes a strong learning agenda?

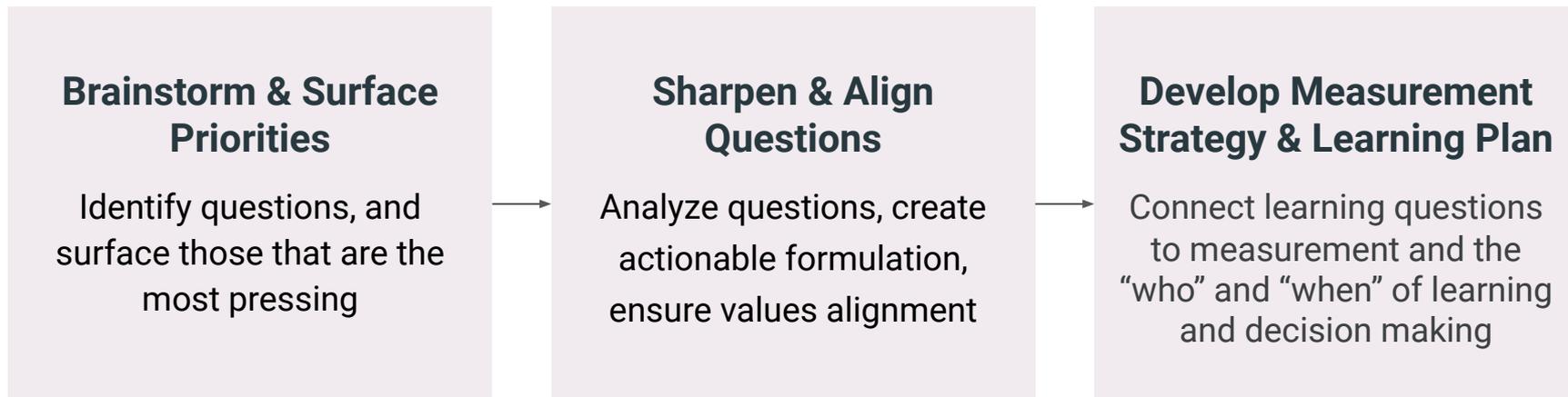
A good learning agenda provides a **“narrow set of energizing, forward-looking, action oriented strategic questions that, if answered, could make a real difference in the work.”** (T. Beer, CEI)

### 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

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

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

## 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?**

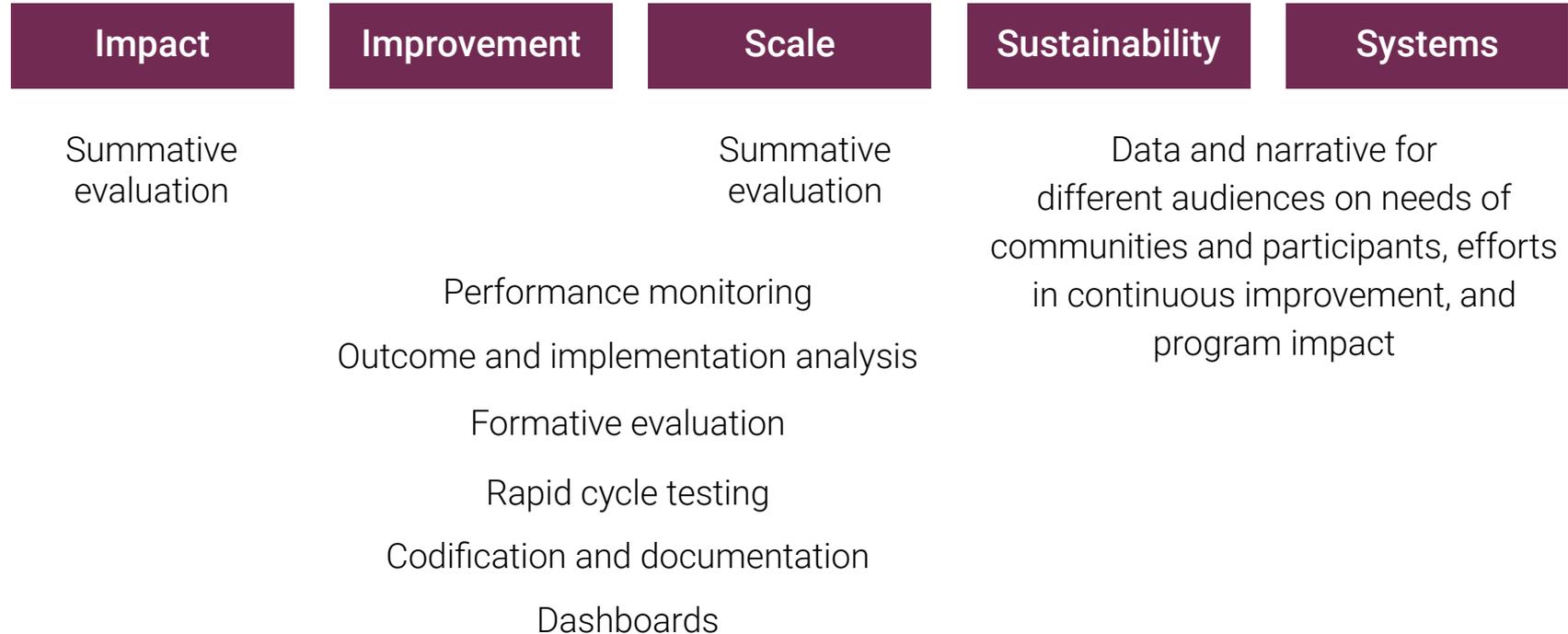
Can it be answered with planned data collection? Can data collection leverage existing touchpoints? How burdensome is data collection?

**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?

## Develop Measurement Strategy & Learning Plan

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.

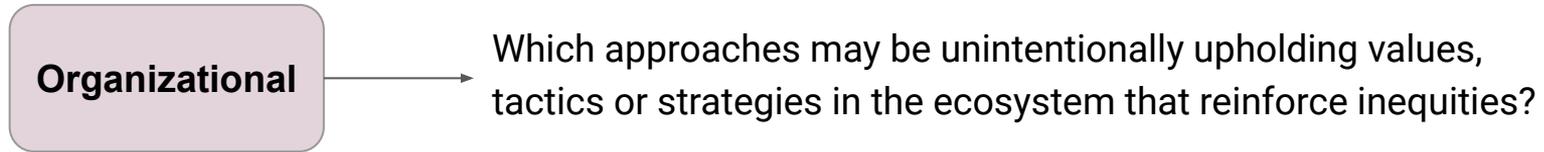


# Some examples of good questions...



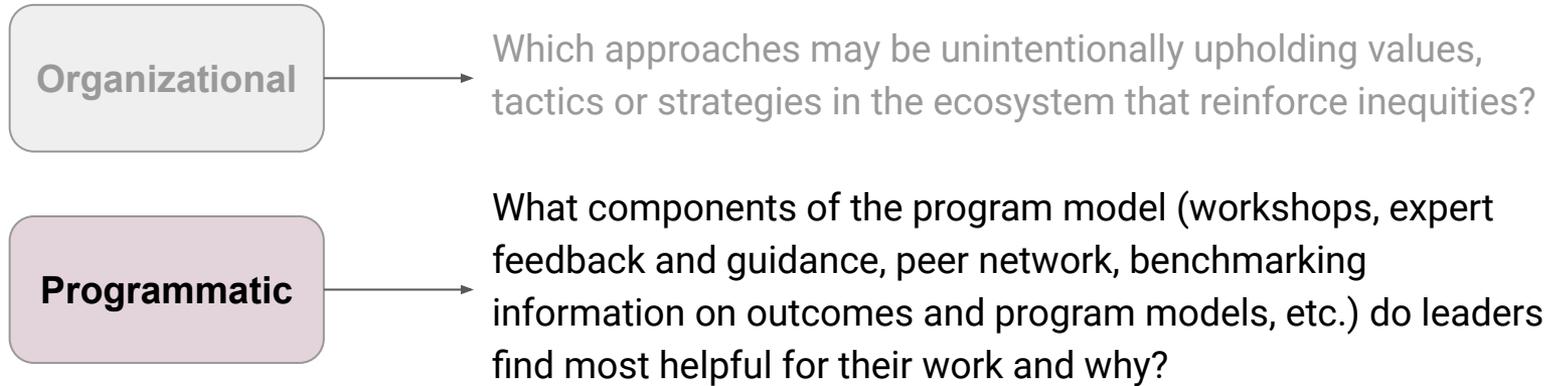
## Example learning agenda questions

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



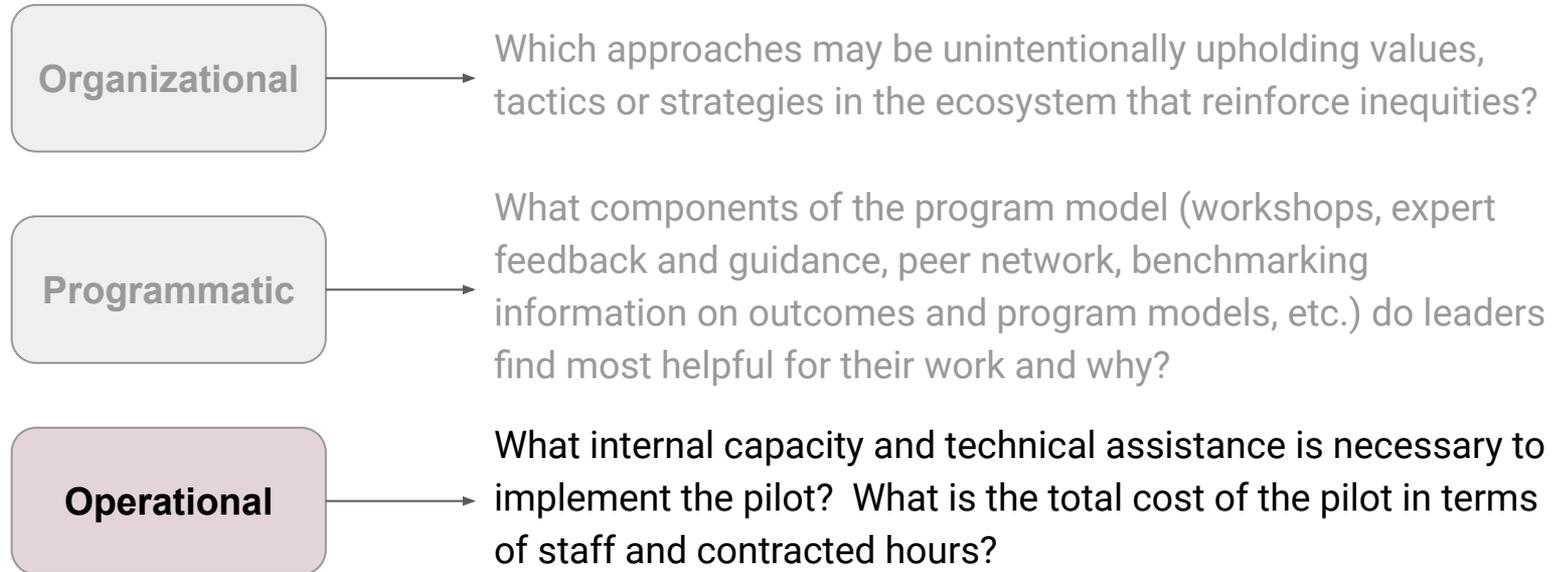
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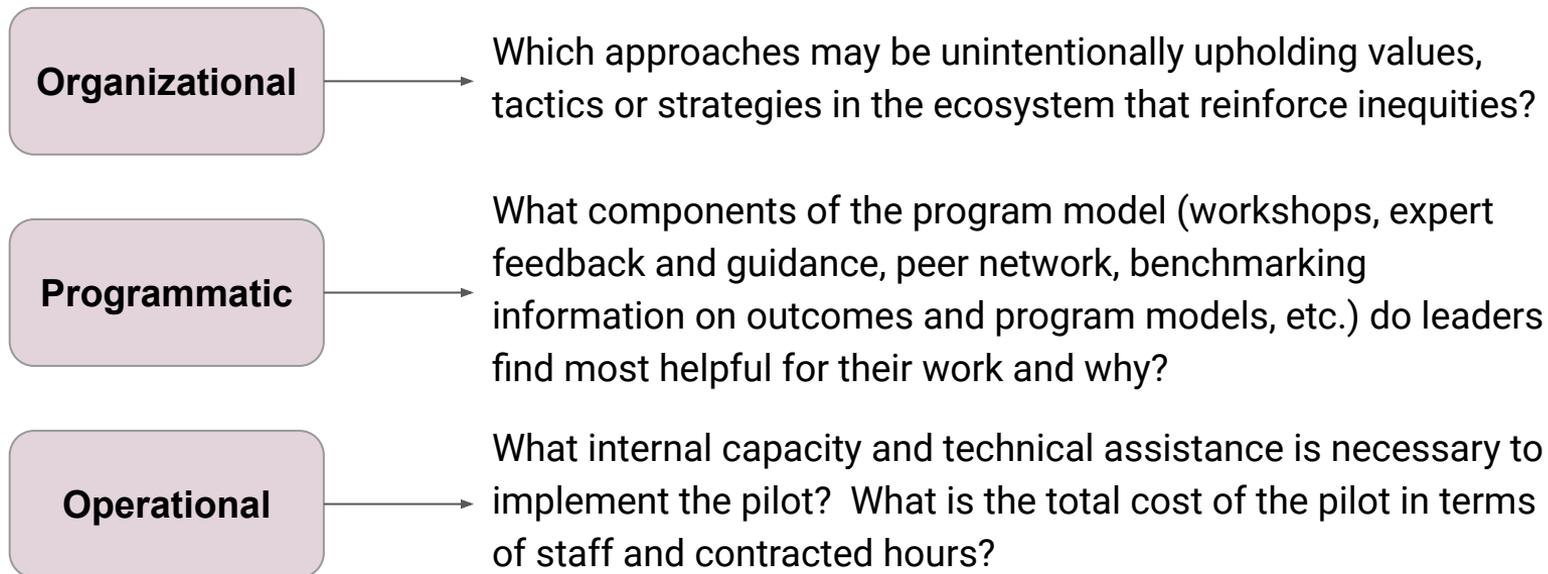
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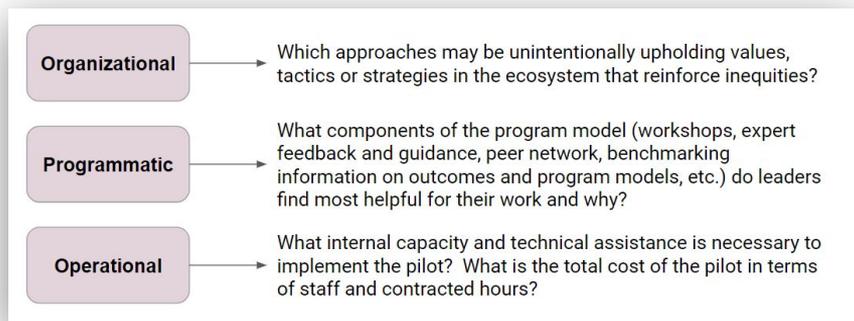
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## These questions can support planning for learning

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

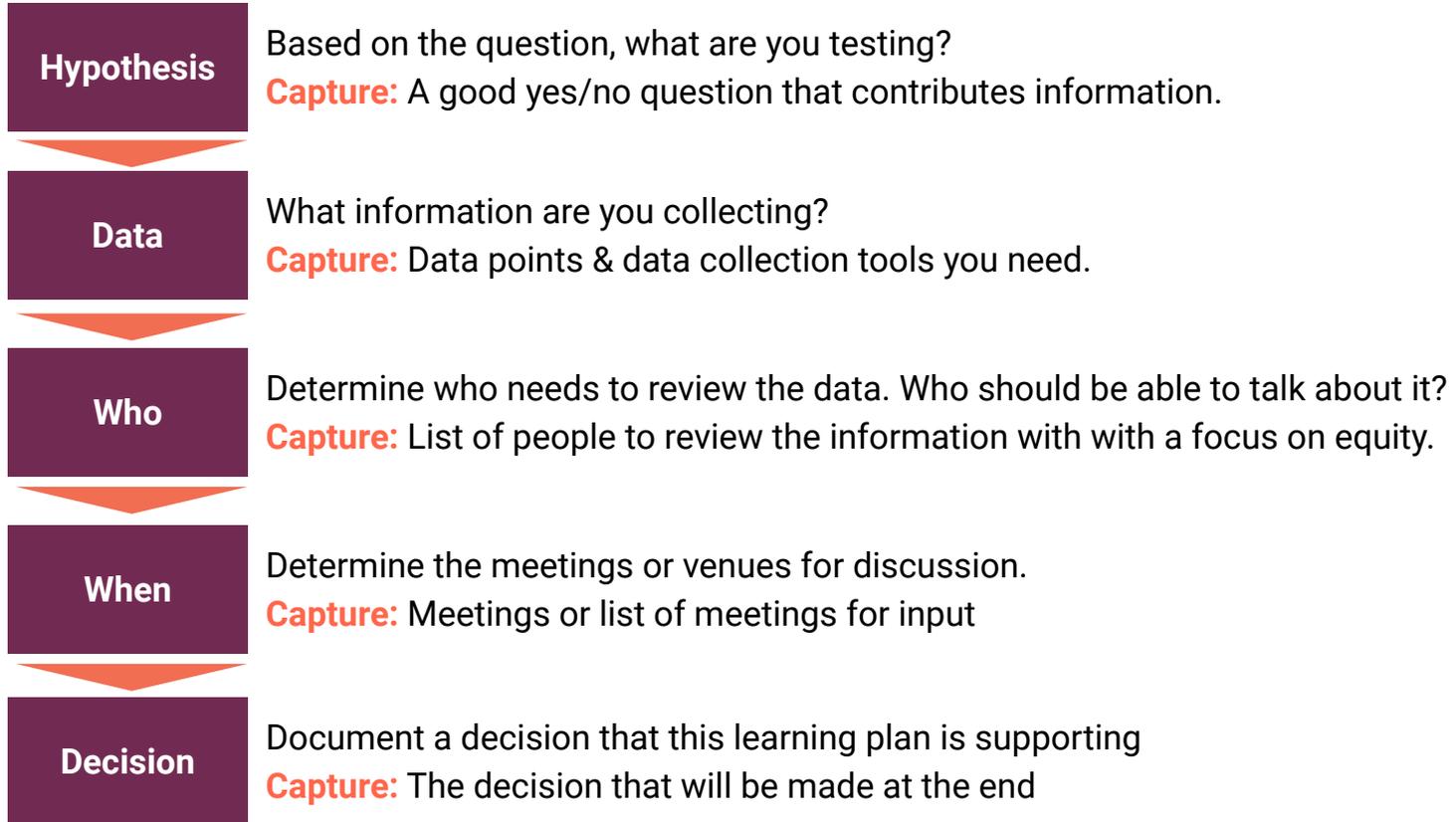


- Is the measurement strategy collecting the data needed to drive decision making?
- Has the knowledge the organization should be collecting and storing in an ongoing way been clarified?
- Is there alignment within and across teams and with community on when and how data is collected and analyzed?
- 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?

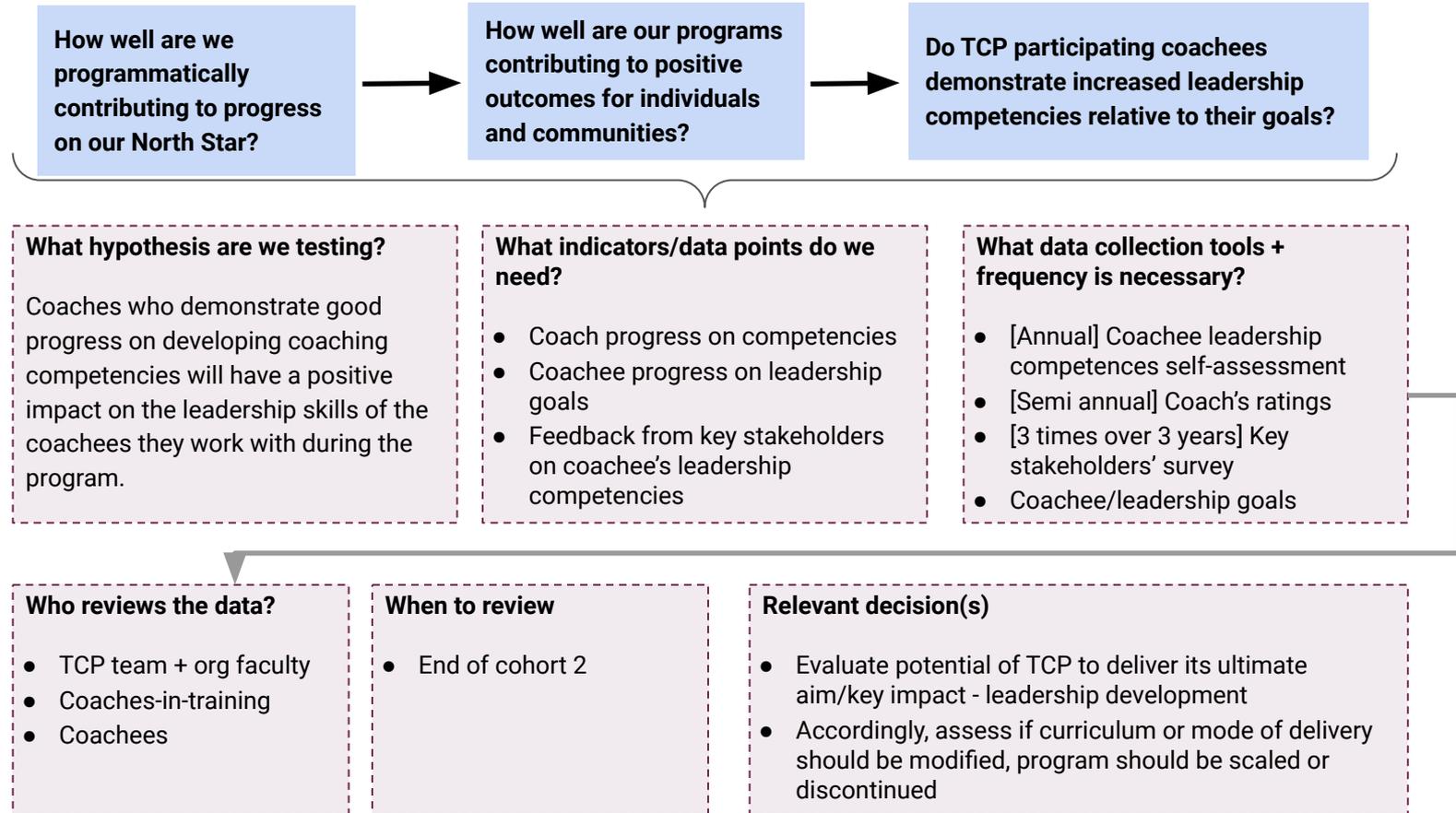
# Putting a learning agenda into action



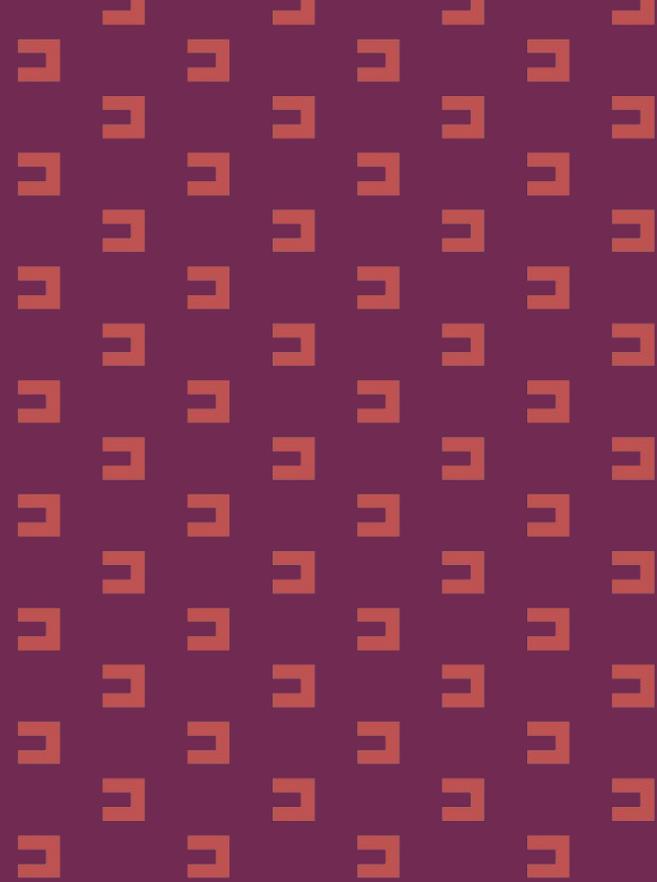
## Developing a Learning Plan



## Below is an example Strategic Learning Plan adapted from The Coaching Program (TCP).



# 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

<b>Evidence Goal</b>	<b>What decision are you trying to make or support?</b> <i>For example, should we direct resources from one program or part of the community to another?</i>	<b>By when?</b>
	<b>What do you need to know in order to make your decision?</b> <i>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.</i>	
	1. 2. 3. 4. 5. 6.	
	<b>From the list of questions above, write the one question that is highest priority.</b> <i>This question is critical to answer before you can make the decision you are grappling with.</i>	

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

Brainstorm the supporting questions you have to answer

Identify a single priority, this may be hard to do!

When do you need to answer it?

## Step 2: Capacity Review

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

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.

## 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.

We will think through immediate next steps, owners, and potential cost (staff time, consultants, partners, etc.)

Make a plan to analyze, access, and process the data to make your decision.				
<b>Evidence Plan</b>	<p><b>Internal Data:</b> Looking at <b>Box A</b> above, what partners can you access to analyze the data? Are there team members you can task with analysis?</p>	<p>What is the immediate next step(s)?</p>	<p>Who will own it?</p>	<p>What do you estimate it will cost?</p>
	<p><b>External Data:</b> Looking at <b>Box B</b> above, who owns the data? Are there existing relationships you can leverage to access the data?</p>	<p>What is the immediate next step(s)?</p>	<p>Who will own it?</p>	<p>What do you estimate it will cost?</p>
	<p><b>New Data:</b> Looking at <b>Box C</b> above, can you or an existing partner structure a survey, focus group, or short research project?</p>	<p>What is the immediate next step(s)?</p>	<p>Who will own it?</p>	<p>What do you estimate it will cost?</p>

## 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?

# Wrapping Up

Feel free to shoot us questions that you have as you use the tool.



## A Practical Worksheet to Support Data-Informed Decision-Making

### Guidance for Completing

The steps below are meant to guide a single decision. Instructions are in italics.

Evidence Goal	<b>What decision are you trying to make or support?</b> <i>For example, should we direct resources from one program or part of the community to another?</i>	<b>By when?</b>
	<b>What do you need to know in order to make your decision?</b> <i>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.</i>	
	1. 2. 3. 4. 5. 6.	
<b>From the list of questions above, write the one question that is highest priority.</b> <i>This question is critical to answer before you can make the decision you are grappling with.</i>		



mine your organizational capacity to collect the data to make your decision.		
<i>Data: What data do you hold that is critical pertinent for the decision?</i>	<i>Do you have the capacity to analyze all of it?</i> Yes / No	<i>A: If not, what resources do you need to complete the analysis?</i>
<i>Data: Can data that others hold that is critical decision?</i>	<i>Are you able to access and analyze all of it?</i> Yes / No	<i>B: If not, what resources do you need to complete the analysis?</i>
<i>Data: What data would be good to get that you do not have that is critical for the decision?</i>	<i>Do you have a process for getting all of it?</i> Yes / No	<i>C: If not, what resources do you need to complete the analysis?</i>

a plan to analyze, access, and process the data to make your decision.			
<i>Data: Looking at Box A above, partners can you access to the data? Are there team members you can task with analysis?</i>	<i>What is the immediate next step(s)?</i>	<i>Who will own it?</i>	<i>What do you estimate it will cost?</i>
<i>Data: Looking at Box B who owns the data? Are there relationships you can use to access the data?</i>	<i>What is the immediate next step(s)?</i>	<i>Who will own it?</i>	<i>What do you estimate it will cost?</i>
<i>Data: Looking at Box C above, or an existing partner like a survey, focus group, or search project?</i>	<i>What is the immediate next step(s)?</i>	<i>Who will own it?</i>	<i>What do you estimate it will cost?</i>

### let's put your plan into action...

Implementation

- Circle the top three immediate next steps above (with owner) and get started
- Lay out all steps on a timeline (with owner) to chart the path to the decision
- Secure funding, or determine ways to mitigate estimated cost above

**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?**



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