

WFF's Approach to Strategy, Learning, & Evaluation

October 2021





STRATEGY LEARNING EVALUATION

The mission of WFF's Strategy, Learning, & Evaluation Department (SLED) is to engage WFF program areas, grantees, and philanthropic partners with rigorous and inclusive evidence that fosters continuous learning for transformative impact

Strategy, Learning, & Evaluation

- The Walton Family Foundation's (WFF) Strategy, Learning, and Evaluation Department (SLED) **was created in 2010**
- SLED works toward its mission of fostering transformative impact by supporting the ongoing adaptation of **Strategy** through **Learning** and insights drawn from **Evaluation** and other evidence
- We use a **strategic learning approach** to integrate the services and supports we provide to WFF colleagues
- **Eleven** SLED staff support their colleagues by designing, managing, conducting, and advising on **relevant research, evaluation, and learning projects**



Our core values



Actionable

We focus on providing the data, evidence, and related resources that staff need to support their reflection and learning, which in turn drives continuous improvement in the foundation's strategies and impact



Flexible

The foundation and its grantees work in areas that are complex and highly fluid, requiring approaches that are customized to meet the needs and context of each project



Culturally Relevant

Programs that are focused on serving historically marginalized populations require research and evaluation approaches that are culturally responsive and equitable



Fair and Accurate

Our projects are designed to meet the highest standards possible, while recognizing that different approaches are necessary depending on the context



Collaborative

All SLED projects should be designed with input from multiple stakeholders, including foundation leadership, program staff, grantees, and external advisors as appropriate



Transparent

We strive to share the results and lessons learned from the foundation's investments with the broader community (other funders, non-profit organizations, policymakers, influencers, and the public) so that they may gain from our experiences



Cost-Effective

We believe the level of resources utilized in our projects should be commensurate to the size and scale of the program or strategy involved, as well as the relative importance and implications of the work



Our approach to Strategy



Define Strategy

- Conceptualize strategy to explicate theories of change, including expected short-, medium-, and long-term outcomes and embedded assumptions
- Develop learning agendas and identify learning questions, hypotheses, and Key Performance Indicators (KPIs) for informing and charting progress



Refine Strategy

- Engage with evidence and develop new insights to refine strategy and theories of change over time
- Codify and communicate strategic refinements to ensure clarity and consistency



The strategy reflection cycle

Q1 Annual Plan Discussion

- Program teams develop their new Annual Plan
- Meet to review the Annual Plan, with a focus on discussing the key activities and expected challenges

Q2 Mid-Year Strategy & Learning Review

- Facilitate learning and reflection engagements to develop lessons, insights, and (micro) shifts made during the first half of the year
- Meet to review the mid-year insights and strategy shifts, with a focus on implications for key activities and adjustments to Learning Agendas moving forward

Q3 Annual Plan Discussion

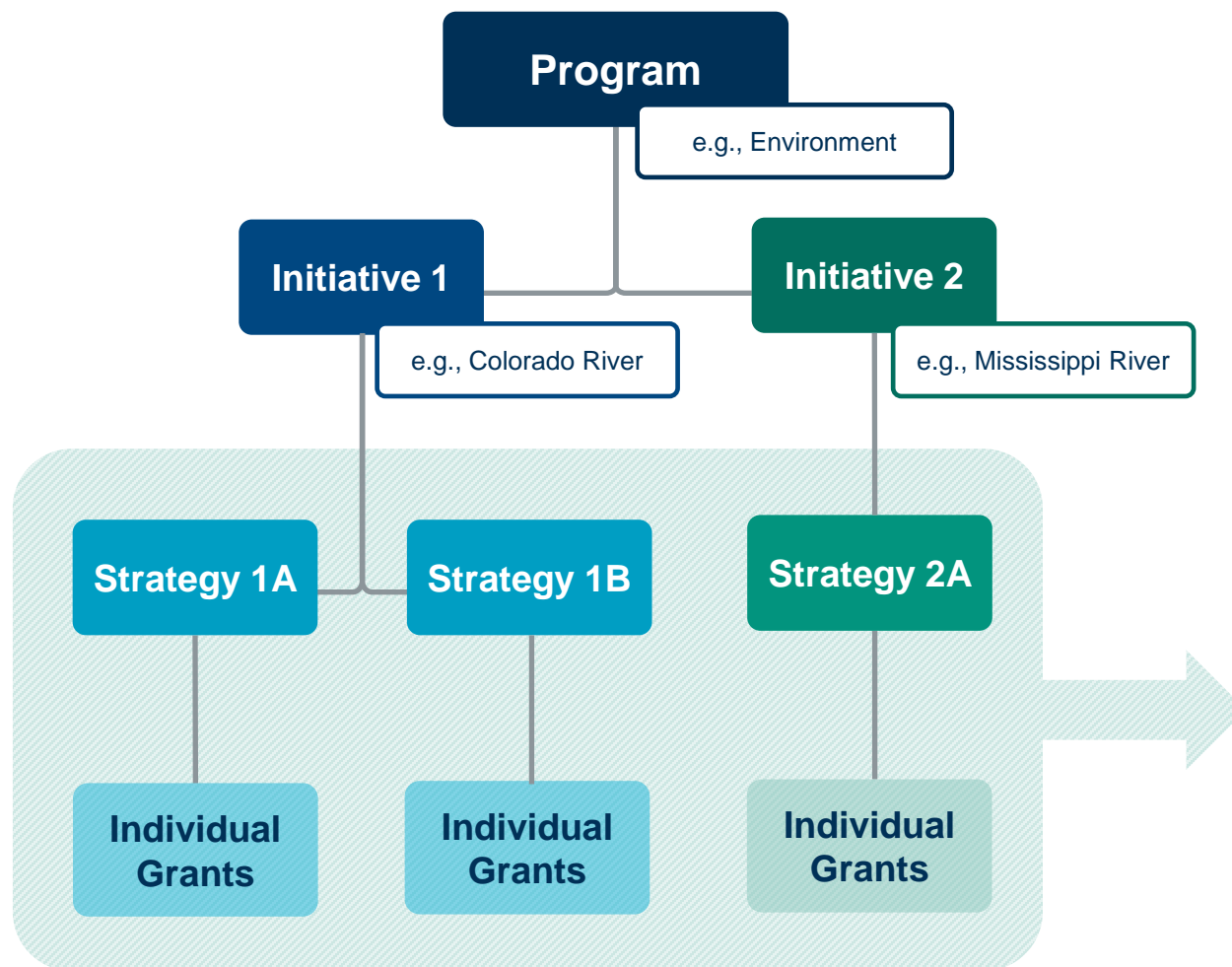
- Meet to review progress toward key objectives in the Annual Plan, with a focus on KPIs and targets

Q4 Look Back & Set Next Annual Plan

- Facilitate learning and reflection engagements to generate lessons, insights, and (micro) shifts made during the year
- Produce a Year-End Summary of Performance, Learnings, and Strategic Shifts
- Meet to review the Year-End Summary, with a focus on implications for the next Annual Plan
- Program teams start process to develop their next Annual Plan



Our approach to Evaluation



- WWF's approach to evaluation focuses on the levels of grants, portfolios, and strategies
- We prefer methods that are rigorous, inclusive, and culturally relevant
- For strategies, we use a variety of information sources to gauge progress and refine strategy including aggregate grant performance measures, strategy-level KPIs, independent evaluations, and program officer and grantee feedback
- For grants, we use output and outcome metrics to understand performance and test hypotheses about how to advance strategy goals



Sources of evidence for determining success



How do we know when we've been successful?

By synthesizing available evidence to estimate our contribution to achieving the key outcome goals set by WFF, partners, and/or communities



Strategy Metrics

Key Performance Indicators (KPIs) tied to strategy goals



Grant Metrics

Provided by grantees



Portfolio Evaluation

Evaluations of grant portfolios



PO Assessments

Insights from program staff



External Perspectives

Insights from external partners



Context Variables

Data on aspects of the broader context that may affect outcomes



Our approach to Learning



The collection and use of data and insights to inform decision-making about strategy...



so that our strategies are nimble and evolve to reflect what we know ...



... to accelerate the pace and maximize the impact of WFF and our partners.



- **Strategic learning occurs in different settings within WFF**, such as creating and adapting individual grants, creating and adapting strategy-level theories of change, or in cross-program conversations
- **External partners can also be engaged in strategic learning**, such as with grantees and peer funders
- With different stakeholders, **strategic learning activities may be different** to best fit the needs and context of participants



What is a Learning Agenda?

A **learning agenda** guides strategic learning and generates insights around key hypotheses aligned with WFF's strategic plans. It includes:

Learning questions are the questions you need an answer to in order to have a successful strategy, often tied to key hypotheses in the theory of change

Grant performance measures are key data points that inform the learning question.

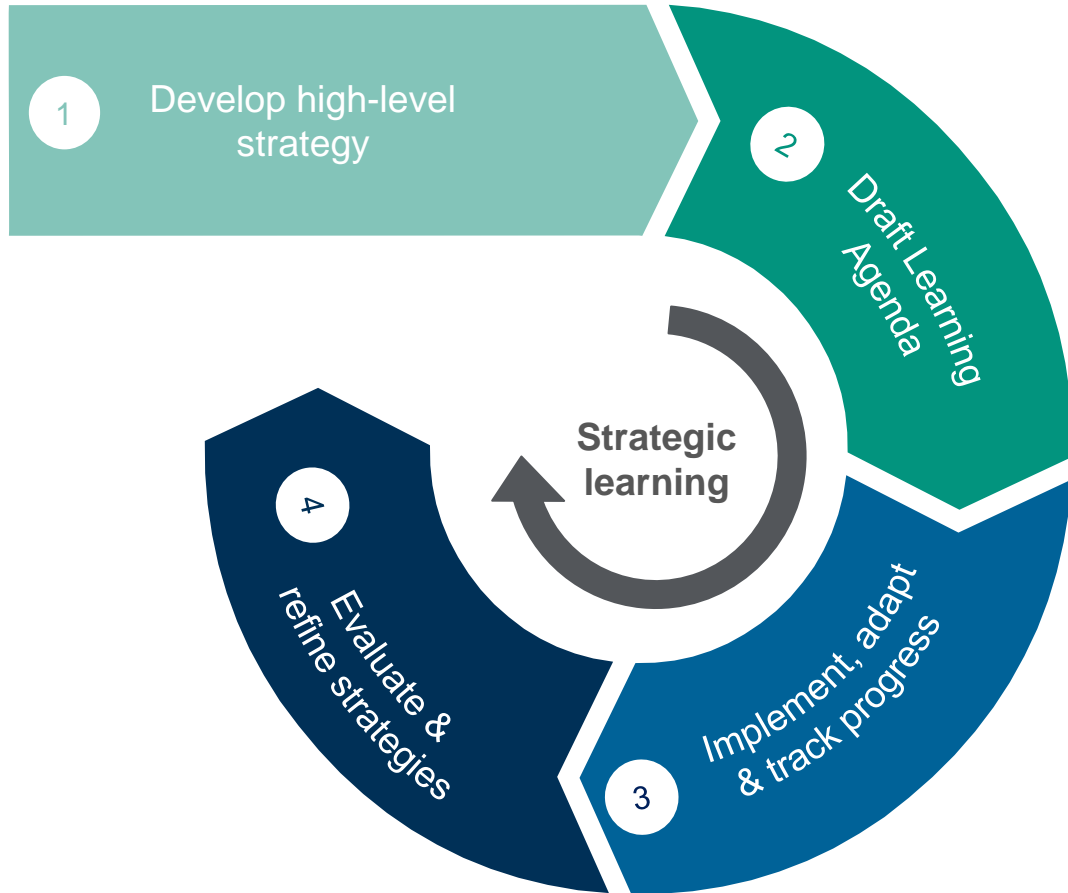


Strategy measures or KPIs are key data points usually broader than the work of one grantee that inform the learning question. In some cases, this may also include aggregations of grantee measures at the portfolio or strategy level.

Additional **learning activities** – such as research and evaluation projects or systematic team reflection and sensemaking – to review information, develop answers to the learning question, and update theories of change and learning agendas.



How it all fits together at WFF



- 1 **Develop high-level strategy**
Articulate mission, vision, initiatives, and strategies
 - Document: **5-year Strategic Plan**
- 2 **Draft learning agenda, including performance measures and targets**
Articulate learning questions and performance measures, with 5-year and interim targets
 - Document: **Learning Agenda**
- 3 **Implement, adapt, & track progress**
Implement strategies and track progress toward goals; Adapt key activities based on progress indicators
 - Document: **Annual Plan**
- 4 **Evaluate & refine strategies**
Adjust strategies based on strategic learning and evaluation results across multiple sources of evidence
 - Document: **Year-end Summary of Performance, Learnings, and Strategic Shifts**