

Introduction to Strategic Learning at WFF

December 2021



“Few, if any, strategies are purely deliberate, just as few are purely emergent. One means no learning, the other means no control.

All real-world strategies need to mix these in some way: to exercise control while fostering learning.”

HENRY MINTZBERG, STRATEGY SAFARI (1998)



What is Strategic Learning?

WHAT

Strategic Learning is the collection and use of data and insights **to inform decision making about strategy...**

SO WHAT

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

WHY

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



*Strategic learning is **different from** other forms of learning, it is not:*

- Professional Development: Building new knowledge and skills through courses or conferences
- Sharing Information: Disseminating research to others without further engagement to identify insights that drive action



Strategic Learning is embedded in our work

Strategy process at WFF



- 1 Develop high-level strategy**
High-level strategy informed by evidence and insights
- 2 Draft learning agenda, including performance measures and targets**
Learning Agendas developed to guide strategic learning efforts
- 3 Implement, adapt, & track progress**
As implementation unfolds, Learning Agendas used to guide collection of evidence, reflection, learning, and insights to inform micro- and macro-shifts
- 4 Evaluate & refine strategies**
Adjust strategies based on strategic learning and annual summative evaluation (summary of metrics and learning).



What Strategic Learning looks like at WFF



Using landscape data to identify new grant funding opportunities where WFF is best positioned to make a difference



Using active listening and structured dialogue with grantees to shape our approaches to capacity building



Connecting insights and experiences from across programs to refine community-driven change efforts



Collaboratively making sense of evaluation data and using these insights to adapt strategies and grants



Learning comes in many forms





Strategic Learning draws on many sources of information



Strategic Learning

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



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



Strategic learning follows the natural rhythm of work



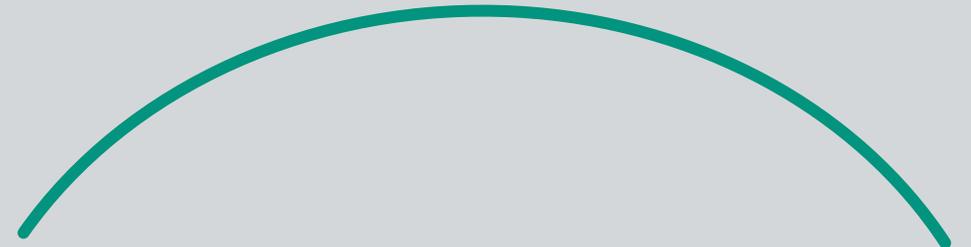
How can we support grantee capacity to adjust to the changing policy context?



What will it take to build the political will of school districts to take on this challenge even as their budget declines?



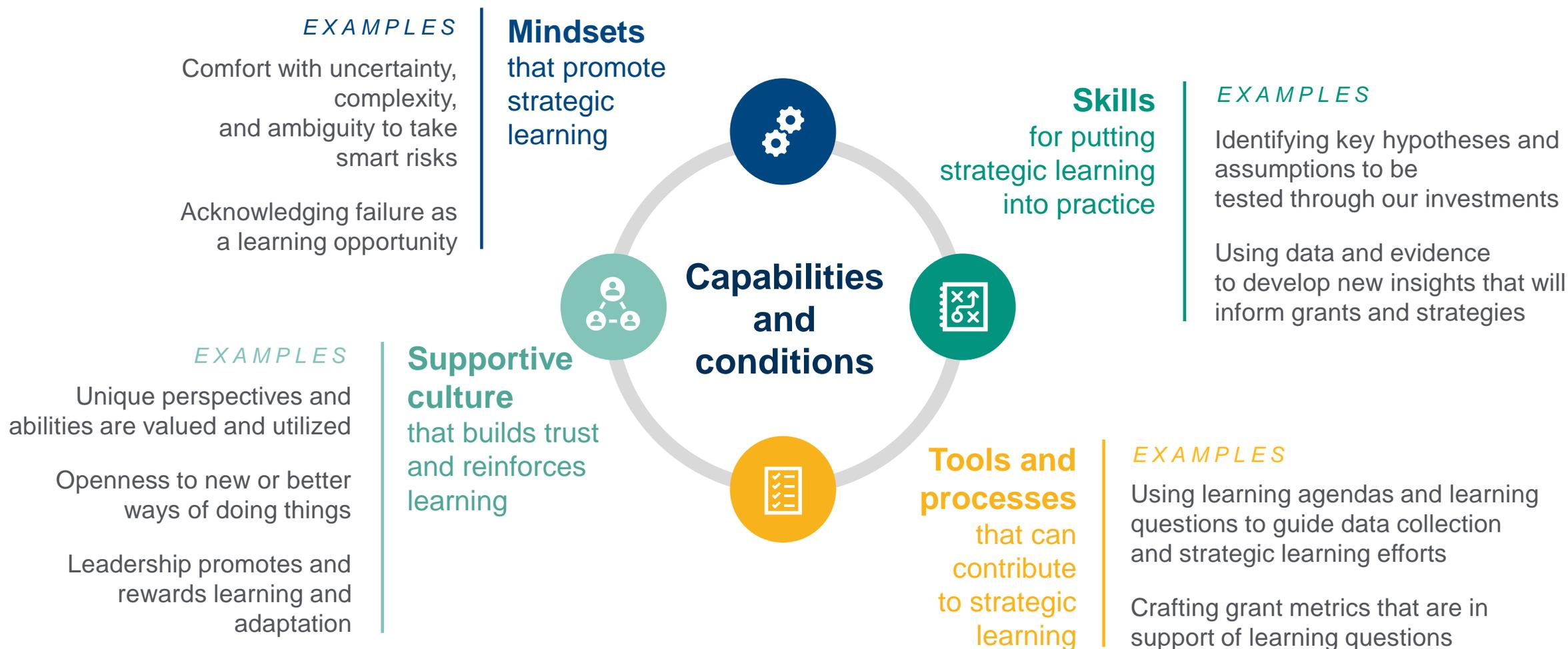
How do we gain credibility in this field, given that it's a new area for us?



How can we reduce disparities in educational outcomes?



Strategic Learning capabilities and conditions





Strategic Learning roles and responsibilities

SLED

- Develops and implements learning agenda with Programs
- Monitors grant progress and designs third party evaluations with Programs
- Helps Programs identify strategic learning needs; provides hands-on support in meeting these needs
- Helps grow staff capacity to engage in, design, and facilitate strategic learning
- Facilitates conversations to evaluate and refine strategies and produces Year End Performance & Learning Summary

Programs

- Develops and implements learning agenda with SLED
- Monitors grant progress and designs third party evaluations with SLED
- Tests strategies and tactics
- Reflects on data sources to surface insights and opportunities for improvement
- Adapts grants, grantmaking approach and strategies
- Documents strategic shifts

WFF leadership

- Communicates the importance of learning and models a culture of learning

External partners

- Align with WFF strategic learning approach, thereby supporting programs in data collection and learning that results in strategic adaptation

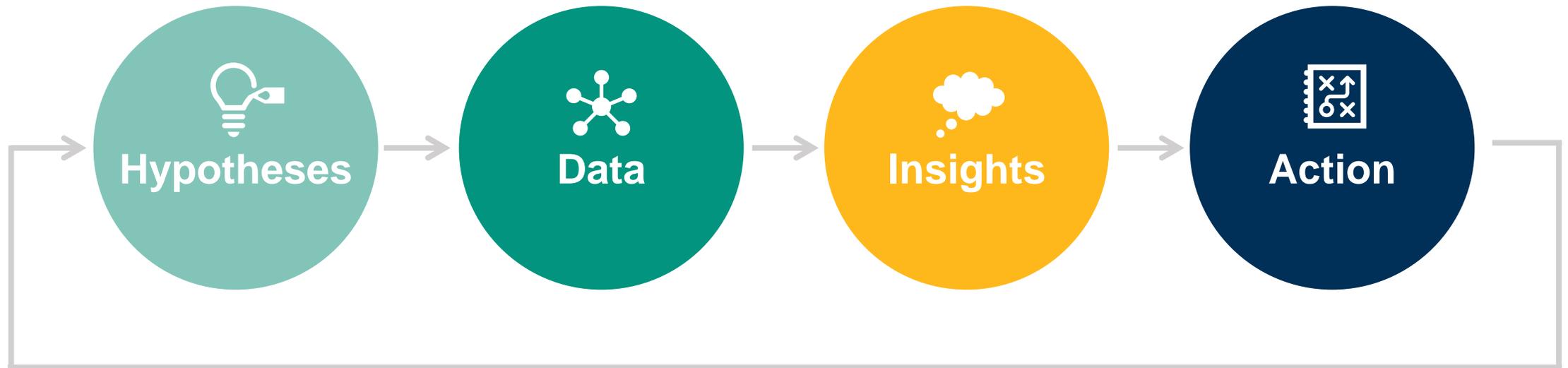
Communications

- Selectively facilitates sharing of WFF-generated insights from strategic learning activities with grantees and other partners



Strategic Learning moves data to action

STRATEGIC LEARNING





How are grants connected to Strategic Learning?

At the Grant-level

Team and individual efforts that **develop and collect institutional knowledge** by:

- **Test tactics and strategies** through grants
- **Align grant measures** with learning questions
- **Monitor progress** through informal grantee check-ins
- **Review and reflect on grant reports** and evaluation end-term data to surface insights and new ideas for how change happens
- In **grant reports**, critically reflect on data to identify insights and lessons
- **Capture and share learnings** internally and externally
- **Adapt grants and grantmaking approach**

More frequently

Strategic Learning

Evolve and strengthen strategy based on learnings

Apply learnings to grants

At the Strategy-level

Team and individual efforts that **develop and collect institutional knowledge** by:

- **Test strategies** through grants and portfolios
- **Align strategy measures** with learning questions
- **Design third party evaluations** to address learning questions
- **Monitor context and trends** through informal knowledge gathering
- **Reflect on information from many sources** to surface insights and new strategy ideas
- **Capture and share learnings** internally and externally
- **Adapt theory of change and learning questions**

Less frequently

Appendix





Example Resource: Asking Powerful Questions

Asking Powerful Questions is a key practice for strategic learning. Powerful questions lead to productive, engaged dialogue because they can inform future actions and decisions and unlock new insight and understanding.



Pay attention to the three question dimensions of **construction, scope, and assumptions** (see resources below).



Yes/No Which Who When Where What How Why What If

Resources



If you prefer **reading**: [4-page brief](#)



If you prefer **listening or watching**: [webinar](#)

POWERFUL QUESTIONS ARE...



Relevant and inspiring



Forward and action-facing



Includes and appeals to a diverse audience



Genuine – we don't know the answer



Able to make a real difference

“If I had an hour to solve a problem and my life depended on the solution, I would spend the first 55 minutes determining the proper question to ask, for once I know the proper question, I could solve the problem in less than five minutes.”

ALBERT EINSTEIN



Example Resource: Facilitation Methods

The **ORID** and **Consensus Workshop methods** from Technology of Participation (TOP) help a group develop thinking in a logical manner and avoid circuitous conversations and frame a conversation around a focus question and builds consensus about a complex topic.



ORID is highly adaptable and useful in many situations. The Consensus Workshop is best for **group exploration of one overarching question**. Another good reflection option is Before Action Review / After Action Review (BAR/AAR).

Resources 

ORID: [about the method](#) and [sample questions](#)

Consensus Workshop: [basic description](#) and a [Google Slides Template](#)

BAR/AAR: [facilitation questions](#)

ABOUT ORID METHOD



Objective:

questions about facts
or external reality



Reflective:

questions to call forth immediate
personal reaction to the data



Interpretive:

questions to draw out meaning, value,
significance, and implications



Decisional:

questions to elicit resolution

**“The art of conversation is the art
of hearing as well as being heard.”**

WILLIAM HAZLITT