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)
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 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.
Develop high-level strategy
High-level strategy informed by evidence and insights

Draft learning agenda, including performance measures and targets
Learning Agendas developed to guide strategic learning efforts

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

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

**Expanding Knowledge**
Grantee or government reports, foundation meetings, academic studies, webinars, etc.

**Sharing Insight**
WFF-generated information/learning, like research, evaluations, and data, shared with grantees and other partners.
Strategic Learning draws on many sources of information.

- **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: The use of data and insights to inform decision-making about strategy.
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?

Adapted from Coffman, J. and Beer, T. Strategic Learning in Philanthropy. Presentation to WFF staff, 2020
Strategic Learning capabilities and conditions

**Mindsets** that promote strategic learning
- Comfort with uncertainty, complexity, and ambiguity to take smart risks
- Acknowledging failure as a learning opportunity

**Skills** for putting strategic learning into practice
- Identifying key hypotheses and assumptions to be tested through our investments
- Using data and evidence to develop new insights that will inform grants and strategies

**Supportive culture** that builds trust and reinforces learning
- Unique perspectives and abilities are valued and utilized
- Openness to new or better ways of doing things
- Leadership promotes and rewards learning and adaptation

**Tools and processes** that can contribute to strategic learning
- Using learning agendas and learning questions to guide data collection and strategic learning efforts
- Crafting grant metrics that are in support of learning questions

**Examples**
-Comfort with uncertainty, complexity, and ambiguity to take smart risks
-Acknowledging failure as a learning opportunity

- Identifying key hypotheses and assumptions to be tested through our investments
- Using data and evidence to develop new insights that will inform grants and strategies

- Unique perspectives and abilities are valued and utilized
- Openness to new or better ways of doing things
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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

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

**WFF leadership**
- Communicates the importance of learning and models a culture of learning
- Selectively facilitates sharing of WFF-generated insights from strategic learning activities with grantees and other partners

**Communications**
- Reflects on data sources to surface insights and opportunities for improvement
- Adapts grants, grantmaking approach and strategies
- Documents strategic shifts
Strategic Learning moves data to action
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**

**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**
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).

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If you prefer reading: [4-page brief]
If you prefer listening or watching: [webinar]
“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
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).

**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

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

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

**BAR/AAR**: [facilitation questions](#)
“The art of conversation is the art of hearing as well as being heard.”

WILLIAM HAZLITT