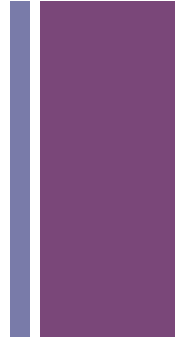




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**Emergent Learning**  
**Using Evidence to Improve Impact**  
Lodestar Center for Philanthropy and  
Nonprofit Innovation  
22nd Annual Nonprofit Conference on  
Sustainability Strategies  
November 5, 2014

# + Learning Objective & Agenda



## **Learning Objective:**

Understand how the approach and core tools of Emergent Learning increase effectiveness as teams learn quickly together and implement changes for the purpose of improving impact.

## **Agenda:**

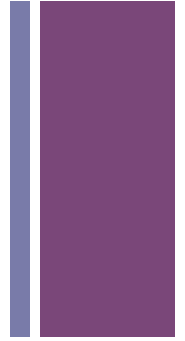
- Welcome and Introductions
- Emergent Learning Overview
- Before and After Action Reviews
- Hands-on Activity
- Resources

# + Welcome and Introductions

- Welcome
- Introductions: Name, Organization, Role in Organization



# + Emergent Learning

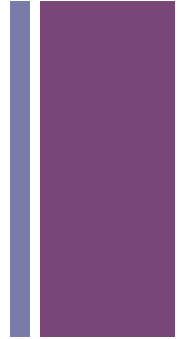


Emergent Learning helps us:

- Make informed, evidence-based decisions.
- Continually track progress to obtain real-time data.
- Quickly adjust action based on what we learn from the data.

**Fourth Quadrant Partners** ([www.4qpartners.com](http://www.4qpartners.com)) developed, practice, and teach the Emergent Learning approach and tools.

# + Core Emergent Learning (EL) Tools



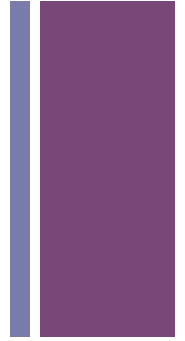
- Before Action Reviews
- Framing Questions (“What will it take to ...?”)
- Emergent Learning Tables
- If ... then ... Action Hypotheses
- After Action Reviews
- Learning Agenda & Log



People who have used  
emergent learning  
have stories to tell!

- Accelerated learning
- Innovative hypotheses
- Adaptive solutions

# + Emergent Learning Theory of Change



Influenced by the fields of:

- Organizational learning (using the five disciplines of holding creative tension, reflection and inquiry skills, shared vision, team learning, and systems thinking).
- Complexity theory (how complex systems adapt and cope with conditions of uncertainty).



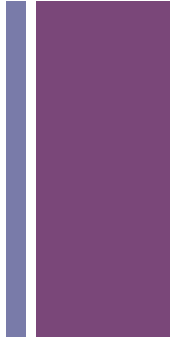
Today we'll  
focus on two  
Emergent Learning  
tools

- Before Action Review (BAR)
- After Action Review (AAR)





# Before and After Action Reviews



## **BENEFITS**

Fast, real-time learning as you:

- Do your normal, day-to-day work
- Collaborate with colleagues, teams, individuals from other organizations, community groups, etc.

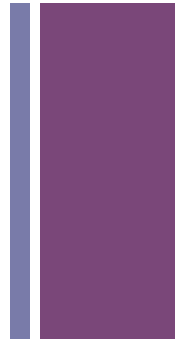
## **EXAMPLES OF WHEN TO USE**

Before and after:

- Meetings (staff, team, client, board, etc.)
- Events
- Projects
- Your individual work – planning and reflection



# Before and After Action Reviews



## ***BEFORE ACTION REVIEW***

What are the intended results?

What will success look like?

What challenges might we encounter?

What have we learned from similar situations?

What will make us successful this time?

When will we do an AAR?

## ***AFTER ACTION REVIEW***

What were the intended results?

What were our actual results?

What **caused** our results?

What will we sustain or improve?

What is our next opportunity to test what we learned?

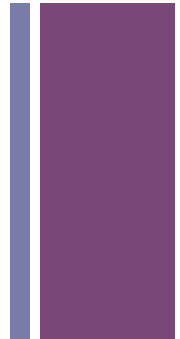
When will we do our next BAR?

# + Why the BAR Questions Matter

<b>The Question</b>	<b>Why it is important</b>
What are the intended results?	Saying out loud, in advance, what you expect to achieve increases the likelihood of success.
What will success look like?	Using very specific words to describe the results you want increases clarity and shared understanding. Avoid “fuzzy” words about behavioral changes, metrics, etc.
What challenges might we encounter?	Learning to predict challenges increases your ability to stay on track.
What have we learned from similar situations?	Asking this question every time strengthens the often weak link between planning and reflection.
What will make us successful this time?	Wrapping up the conversation with a shared “hypothesis” helps everyone be prepared to act in a coordinated way when the plan makes contact with reality.



# Why the AAR Questions Matter



The Question	Why it is important
What were our actual results?	This keeps the conversation honest!
What <b>caused</b> these results?	This is the heart of the conversation – for successes and disappointments, both anticipated and unexpected.
What will we sustain?	This is data about what worked well.
What will we improve?	This information provides data to support ongoing learning.
What is our next opportunity to test what we have learned?	<b>ALWAYS</b> identify the next opportunity to apply and deepen the learning before you leave the room. A lesson is not <b>LEARNED</b> until it is applied and gets better results. Because the world is always changing, we have to adapt the lesson to fit the next situation.

## + What does a BAR or AAR Require?

Honestly thinking and respectfully talking about every question in the order presented in the template and writing down your answers.

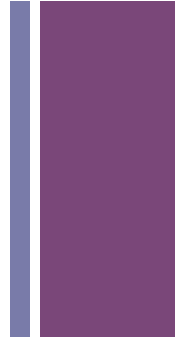
That's it!



Let's try it

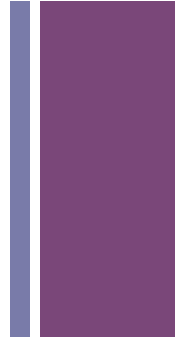
**Hand-on activity**

# + Overview of the Activity



1. Move to a table with others who want to talk about a similar topic.
2. One person at the table volunteers to be the “case study” and talks about an actual meeting or event coming up – something that is really on the calendar.
3. Using the BAR template, the rest of the group asks the “case study” volunteer each question. One person scribes the answers.

I'll observe how the conversations are going and let you know when 10 minutes, 5 minutes, and 1 minute remain for the activity.



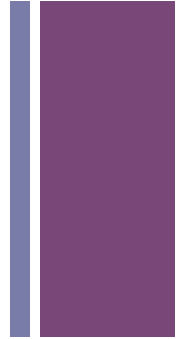
1. Move to a table with others interested in the same topic.







# Case Study Conversation



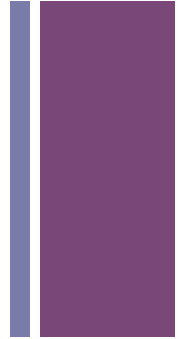
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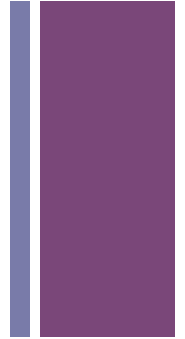


# Reflections



- What worked well?
- What was challenging?
- What was different because you used the BAR tool compared to what you would have done typically?

# + What's on your calendar?



1. Select an upcoming meeting or project.
2. Conduct a BAR.
3. Conduct an AAR.





## Resources on Emergent Learning

[www.4qpartners.com](http://www.4qpartners.com)

[www.flanagan-hyde.com](http://www.flanagan-hyde.com)

Tools and publications available for  
free downloading



Questions about  
Emergent Learning?

Sharon Flanagan-Hyde is a Master Practitioner Certification candidate in the 2014 Fourth Quadrant Partners Emergent Learning Certification Program™ and is eager to share her experiences.

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[www.flanagan-hyde.com](http://www.flanagan-hyde.com)



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Connecting Knowledge and Data, Generating Solutions