Center for
Evaluation Innovation

STRATEGIC LEARNING
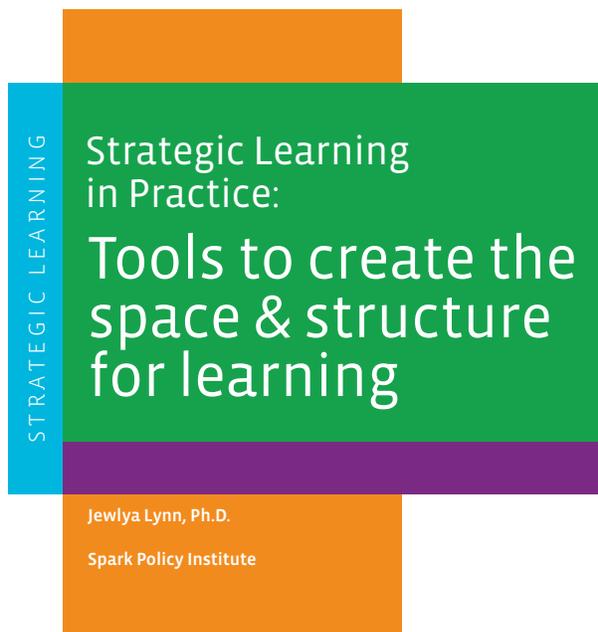
Strategic Learning in Practice:

Tools to create the space & structure for learning

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Introduction

Evaluation that supports strategic learning applies evaluation findings as well as non-evaluation data in order to improve a strategy (Coffman & Beer, 2011). Tools to support the practice of evaluation for strategic learning have yet to be articulated, in part because learning itself can be so varied that the idea of common tools is hard to conceptualize. Yet there are tools that broadly apply to many strategic learning settings and that can become core to the success of a learning organization.[1]

Organizations do not routinely learn unless they are purposeful about creating both the space and the structure for collective dialogue and exchange (Coffman & Harris, 2005). This brief explores two tools that organizations can use for this purpose:

- *Theories of Change* that create the *structure* for learning and function as living documents that are equally relevant to planning, implementation, and learning.
- *Strategic Learning Debriefs* that create the *space* for learning through reflective practice designed to move from learning to action.

These tools are familiar to the nonprofit and philanthropic sectors. Theories of change are commonly used for strategic planning and are often created by evaluators to clarify program logic and guide the evaluation process. In addition, evaluators often use periodic debriefs to provide program implementers with updated evaluation findings. However, using these tools specifically to support strategic learning requires some adaptation from how they are traditionally used.

This brief describes practical steps for designing and using theories of change and strategic learning debriefs as tools for creating the space and structure for strategic learning. It draws on multiple bodies of theory and research that can guide strategic learning practitioners in developing thoughtful and informed strategies for learning. A case example at the end of the brief *(page 8)* illustrates the use of both tools.

The two tools are part of a fully articulated strategic learning model used by Spark Policy Institute. This model has been defined through previous research, uses a quality assurance process that draws on both the evaluation and learning literature, and includes a core set of tools tied to bodies of knowledge in many fields, including organizational learning, organizational development, learning organizations, action research, collaborative inquiry, evaluation theory and practice, developmental evaluation, and communications.[2] Much like the strategic learning model itself, this brief is focused on the practical. However, for those who want to better understand the theories underlying the model, more detail is included in the end notes.

Defining Strategic Learning

Strategic learning has been defined in many ways. As a concept, strategic learning is an intraorganizational ecological process that integrates different types of learning in organizations and includes processes for both creating knowledge about strategy and refining it (Kuwada, 1998). It encompasses many types of learning that fosters knowledge that leads to differences in organizational performance (Thomas, Watts, Sussman, & Henderson, 2001). Strategic learning as a practice can be found in the approaches of evaluators and organizations undertaking evaluation where it can be a tool for real-time improvements as strategies are developed (Patton, 2011). Strategic learning in both concept and practice is perhaps best brought together by action research, which solves a problem using a cyclical process that moves between the pursuit of change through action, and new understanding through research (Dick, 1999).

Most definitions of strategic learning, including these, feature two core elements:
1. *Learning:* The systematic use of data for continuous improvement and the collective interpretation of new information.
2. *Being strategic:* Applying the collective interpretation of information to strategy.

What is not included in many definitions, but is arguably critical if the learning is to move from intuitive to strategic, is:
3. Utilizing theory and research to ground both strategy *and* learning in a broader context of what is known about the world.

Grounding the strategic learning process in theory and research is a necessary step to move from learning based on assumptions to learning based on what is possible in reality. Often, organizations and individuals base their understanding of what they can accomplish—and what they learn about their accomplishments—on their own unspoken paradigms informed by past experiences. Even organizations that build logic models or theories of change to articulate their hypotheses about how change will happen sometimes do so without understanding what existing theory and research tell them about what is realistic. Without such a research base, strategic learning might feature systematic data collection, collective interpretation, and purposeful use of the learning, but still focus on intuitive ideas about what is possible and what matters in the broader environmental context, rather than on information that is most likely to improve the strategy to produce results.
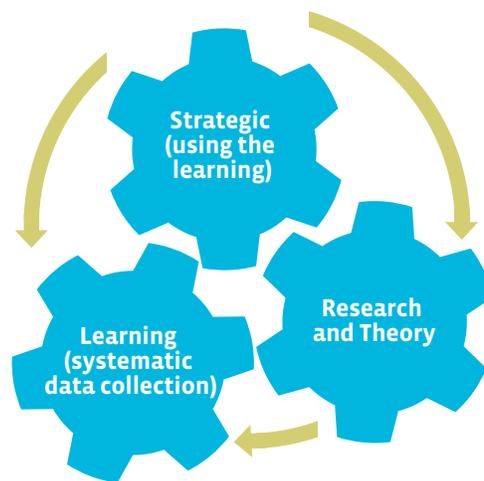
Theories of change (TOCs) are tools for developing solutions to complex social problems (Anderson, 2005). Evaluators have recognized the importance of using theory-based evaluation for decades (Lipsey & Pollard, 1989), and theories of change have developed as a tool for connecting program design, theory, and evaluation.[3] In practice, a basic TOC explains the step-by-step process of how interim outcomes produce long-term results. A more complex TOC integrates the underlying assumptions informing that process, clarifying the ways in which interim outcomes contribute to desired long-term changes (Anderson, 2005). Through a 'backward mapping' process from long-term to intermediate outcomes to actions taken today, an honest picture of the steps required to achieve impact is created, thereby informing strategic planning and evaluation.

Some evaluators believe that planning and implementation also can benefit from a well-developed theory of change. Rather than waiting until the end of a program, a TOC can facilitate the clear definition of goals during the design phase, and support data collection and measurement throughout a strategy's interim phases.[4]

A TOC is also the means by which a research base can be integrated with activities and their intended outcomes. At its best, the TOC is a clear description of activities and their relationship to outcomes, staged over time from the shortest-term outcomes to those that are dependent on multiple activities and previously accomplished outcomes. Ideally, each point in the TOC that transitions from an activity to an outcome is supported by research that indicates the intended strategy can lead to that outcome. Each outcome on the TOC is also supported by research that indicates the outcome is an important step on the road to desired long-term outcomes and impact.

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The strategic learning model of a theory of change takes this belief a step further, using the theory of change as a programmatic tool first and an evaluative tool second. The theory of change model departs from a focus on the measurable to developing *a theory of what matters.* In the process, the theory of change becomes not just a "common framework and shared vocabulary for stakeholders to understand and communicate the rationale and intended impact of strategies," (jdcPartnerships, 2011) but also an ongoing planning tool to keep the focus on the strategy's intended impact.

To better articulate the Theory of Change for strategic learning purposes, the next sections describe practical steps for:

- **Design:** Ensuring the design is led by program staff, informed by research, and results in a clearly defined roadmap, from activities to interim outcomes to long-term change.
- **Ongoing Use:** Making the Theory of Change an ongoing planning document, allowing for and knowing when to change it, and using it to guide strategic learning.

If a strategy was not originally designed using a research base, the first step is background work to identify possible research frameworks and explore which is the best fit. For example, if a strategy addresses obesity prevention through nutrition and education programs, an ecological, behavioral, or psychological research framework might be used, or one that draws on multiple sources that articulate a clear connection between the nutrition and educational activities and the desired outcomes.

Once the research framework is established, the next step is convening key stakeholders to develop the TOC. This meeting should include, at minimum, a dedicated facilitator who is highly familiar with the research-based framework; staff including leadership; key outside stakeholders where appropriate; and a note taker. While the ideal model is to develop a TOC prior to designing a strategy, it is more common to see a TOC designed after some or all strategy elements have been completed. For example, a TOC might be developed after a grant has been awarded or after a strategy is underway. If any information already exists regarding the strategy and its desired outcomes, a well-prepared facilitator will bring that to the conversation as a starting point.

TOCs are visual representations of strateiges, illustrating a chain of activities leading to outcomes, followed by new activities leading to the next stage of outcomes, finally showing how they all result in the ultimate impact. For this reason, it is most effective to facilitate the dialogue using a visual presentation of information. Large sticky notes for each activity and outcome, large white boards where information can be added and erased, or projections of onscreen TOC development all work well.

At the beginning, known activities and outcomes are displayed and participants are introduced to the research-based framework. Backward mapping from the long-term outcomes to the most immediate steps is a useful facilitation approach. However, if a strategy's activities are largely already defined, it often helps to switch between backward mapping and forward mapping to ensure the final TOC connects existing activities to intended long-term outcomes.

By the end of this process, the TOC should:

■ Clearly articulate strategy activities and the changes they are intended to cause, with a logical progression from early activities and changes to later ones. This staging is critical for the strategic learning process, as it introduces different learning needs at different points in time.

■ Identify plausible relationships between the activities and their desired outcomes based on the research framework. It can be helpful for meeting notes to include why each activity can achieve the desired outcomes, referring to the research. If participants feel uncertain about any of these relationships, follow-up work might be needed.

■ Describe both activities and outcomes to facilitate their day-to-day use. The TOC in this context helps to guide implementation. The process of doing a research-based TOC should, in and of itself, create a greater focus on refining activities to better achieve the change desired.

Finally, the TOC should include all *meaningful* steps in the pathway to change. When used strictly for evaluation purposes, a high-quality TOC should be testable.[5] Its elements should all be measurable. When used for strategic learning, every element may not be measurable. It is more important to accurately describe the meaningful changes that a program hopes to accomplish, or the things that matter most, and identify later the extent to which they can be measured. The TOC should still feature a logical progression of outcomes that aligns with the research-based framework. But because the goal with strategic learning is the steady improvement of strategies, leaving off an important change in the world because it cannot be measured leaves room for strategies to lose focus on that change.

Using a Theory of Change

In a strategic learning setting, a TOC can serve many purposes. Specific to guiding the learning process, the TOC becomes the tool for identifying where systematic data collection, collective interpretation and use of information will be most helpful.[6] Whether focused on the quality of implementation or the resulting outcomes, the TOC guides the focus of strategic learning. It also helps program staff to identify when they want to use the learning, such as taking time to debrief about one set of activities and outcomes before moving to the next in their TOC.

TOCs can be used in many ways in strategic learning settings. Some uses are programmatic while others are more focused on the learning process. They can:

- Serve as the structure for regular check-ins by program staff (and sometimes a strategic learning coach) to assess alignment of strategy activities with desired outcomes.
- Guide the identification of where systematic data collection will be helpful, both in understanding what changes are occurring and understanding the influences on different TOC components.
- Inform the design of strategy activities. If a new activity is being considered, the TOC should be reviewed to assess how the activity fits into the overall vision for what the strategy should accomplish.
- Guide the structure of Strategic Learning Debriefs (see the next section), as data are gathered and summarized based on the TOC. This ensures the discussion focuses on desired outcomes and the long-term vision for change, rather than recent issues or priorities that have bubbled up.
- Educate new staff about the strategy.
- Help new external partners or Board members understand how the many activities underway connect to a broader vision for change.

TOCs are living documents; strategies can change over time. These changes should be made with careful consideration for how the changes will influence what is accomplished in the long run. Sometimes changes are needed not only in activities, but also in desired outcomes. For example, for an advocacy organization, the strategy might shift from changing state policies to changing national policies, which would require both a change in the interim outcomes and a change in activities.

Strategic Learning Debriefs draw on the concept of evaluation presentations that are accompanied by reflection, while also building on proven practices for effective team-based dialogues for learning. Strategic Learning Debriefs are an *opportunity to purposefully and collectively*:

- ■ Present and explore different types of learning in the context of the Theory of Change, including systematic data collection and analysis and intuitive and experiential learning.

- ■ Reflect on the learning and build a shared understanding of its implications.

- ■ Apply the learning directly to the strategy and determine actions that need to be taken, whether changes in strategy or changes in learning.

Strategic Learning Debriefs differ from traditional evaluation presentation and accompanying dialogue in several ways. First, the concept of *dialogue* as articulated by proponents of learning organizations differs from traditional evaluation reflections through its emphasis on all participants, without prioritizing the role of an evaluator, researcher, or other lead "learner." Here, dialogue is focused on "thinking together" (Senge, 1994) and relies on participants who make a commitment to suspend their assumptions about each other and the strategy in order to have a more effective dialogue about what has been learned and its implications. The dialogue allows for discussion about both objective facts and subjective understanding, all within the context of interpersonal dynamics, which cannot help but influence the dialogue's content and quality.

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Because of these interpersonal dynamics, a facilitator is critical to a Strategic Learning Debrief, and is a role that is best filled by someone outside, but highly familiar with, the strategy. Debriefs also differ in how often they occur (at least every six months, if not more often, depending on the needs of the strategy); how data are presented and used (collective interpretation, rather than a presentation of completed findings); their use of experiential and intuitive learning; and their emphasis on leaving with new actions to take.

Strategic Learning Debriefs are *not an opportunity* for experts to present and facilitate a dialogue on their independent findings. While a researcher may be responsible for the systematic collection of data, a Strategic Learning Debrief collectively interprets and applies findings (which comes directly from the definition of strategic learning). Objectivity and independence, valued in many evaluation and research settings, are not treated as inherently valuable in the context of a Strategic Learning Debrief and might even become inhibitors to collective learning when the independent researcher is unable to let go of the power of owning the analysis leading up to the interpretation. Like action research, all participants are treated as equally important and the control often associated with a traditional researcher role is released (Marti & Villasante, 2009). Strategic Learning Debriefs are inherently internal processes (internal to the strategy,

that is), where such things as accountability and documentation are not the focus. Rather, learning and improvement are paramount.

The Logistics of a Strategic Learning Debrief

In practice, Debriefs are two- to three-hour meetings with key staff directly involved in implementing the strategies along with other stakeholders (internal or external to the organization) who are invested in the strategy and familiar with its implementation. The meeting benefits greatly from a dedicated facilitator and note taker. Ideally, the facilitator is someone familiar with the strategy, but also not as invested as key staff in any decisions made.

Strategic Learning Debriefs require thoughtful preparation to be successful. Systematically collected information and findings need to be summarized and presented in an easily accessible way. Visual presentation is helpful, as is the use of stories and quotes to illustrate key findings. Staff responsible for presenting findings should be familiar enough with the information that they can bring key findings into the dialogue as issues arise. Rarely do Debriefs proceed in a linear and structured fashion that allows for each type of learning to be independently presented and explored. In fact, doing so would undermine the quality of a Strategic Learning Debrief, as it is a holistic examination of the strategy using systematically collected data.

Although Debriefs tend not to follow their agendas, it is still important to have a clear sense of what they hope to accomplish. Specific items to cover may include presentation on:

- The Theory of Change (or an update of it) to set the context.
- New learning about the environmental context.
- Completed activities, including learning about how they have been implemented
- The outcomes occurring as a result of activities.

At the Debrief, the facilitator helps participants to review and discuss the strategy and learning. The discussion should explore the extent to which key staff and stakeholders completed activities and achieved desired outcomes. Before the Debrief ends, participants should identify lessons learned and make strategic decisions to be implemented before the next Debrief, including changes to the strategy activities, the Theory of Change, and/or the strategic learning tools. The facilitator and note taker should generate a highly specific set of next steps that move the decisions made during the Debrief into actions. Staff are responsible for integrating those next steps into the strategy work plan and should assign responsibilities to complete them.

Ideally, each Strategic Learning Debrief will leave a "trail of evidence" for use in the future, primarily captured through comprehensive meeting notes. These notes allow any new staff person, future Debrief facilitators, or ongoing staff to review how and why decisions were made and will help to avoid the risk of repeating and cycling through the same set of issues without resolution.

Conclusion

The two tools presented in this brief exist already in the field of evaluation. They also exist in organizational learning and organizational development efforts, although the terminology and approaches are different. As tools for strategic learning, however, they differ somewhat in their implementation and in the reasons for using them.

Both the Theory of Change and the Strategic Learning Debrief are first and foremost programmatic tools when used for strategic learning purposes. An expert does not drive the conversation regarding the collective preparation, development, dialogue, and decision making about strategy. While having someone present who ensures research frameworks are used or who manages the data collection process can be productive, it is critical that the entire team participating in the dialogues is equally involved.

The more collaborative process involved around these tools may result in Theories of Change that include critical outcomes that are not measurable, but do matter, and Strategic Learning Debriefs that rely on both research and intuitive learning to guide decision making. For the evaluation practitioner, both of these can be a challenge to accept, as they can fly in the face of traditional evaluation training and understanding of best research practices. For staff who own the strategy, the opposite is often true. The opportunity to focus on what matters and fully contribute their own experiential learning to the process allows it to be more accessible and more applicable to their work. It helps to gradually tear down the wall that has traditionally separated research-based knowledge from intuitive and experiential knowledge.

CASE EXAMPLE: *We Want Healthcare*

This case example is to illustrate how Theories of Change and Strategic Learning Debriefs can be used. It is based on a fictional nonprofit organization—*We Want Healthcare*—developed as a composite of actual nonprofit organizations that have engaged in strategic learning using Theories of Change and Strategic Learning Debriefs."[8] The following elements are common among all organizations from which the composite example is drawn. They:

- Collect multiple forms of data systematically.
- Value and use both evaluative and non-evaluative data.
- Assign staff to collect and analyze data (and in some cases, an external evaluator is used).
- Use a research framework to bound the understanding of the strategy and guide the learning.
- Engage multiple staff or external partners collectively in interpreting and using data.
- Apply strategic learning to changes in the implementation of their strategy.
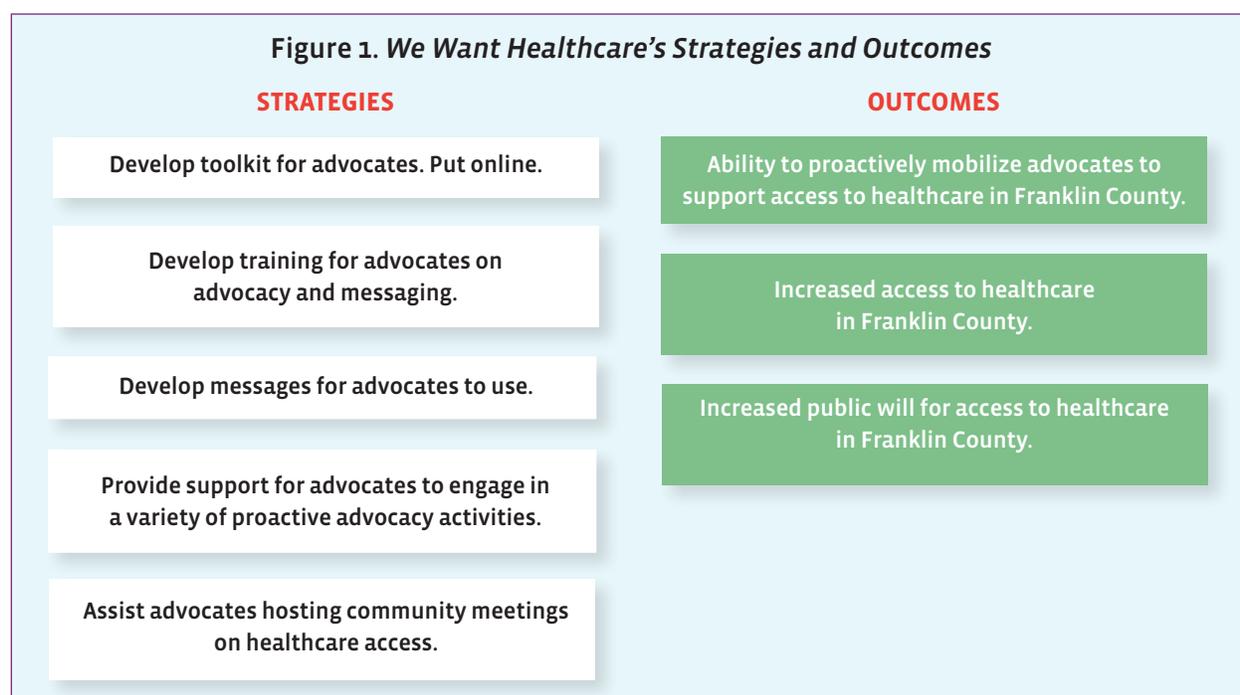
Introducing the Setting

We Want Healthcare's mission is to achieve access to healthcare for everyone countywide. As part of achieving their mission, this organization decided to embed strategic learning into their work by including internal staff in learning activities every week, hiring an evaluator when needed, and using an external strategic learning coach.

Developing the Theory of Change

We Want Healthcare went through a Theory of Change process with a strategic learning coach *after* they decided on their core activities, found funders willing to support those activities, and even started implementing the first few. With a **newly hired strategic learning coach**, they found themselves articulating why their work mattered for the first time. They decided to focus their TOC process and their strategic learning on activities that were relatively new to their organization. In the past, they had done lobbying and educational activities, but this was the first time they had tried to develop a network of advocates to carry their message.
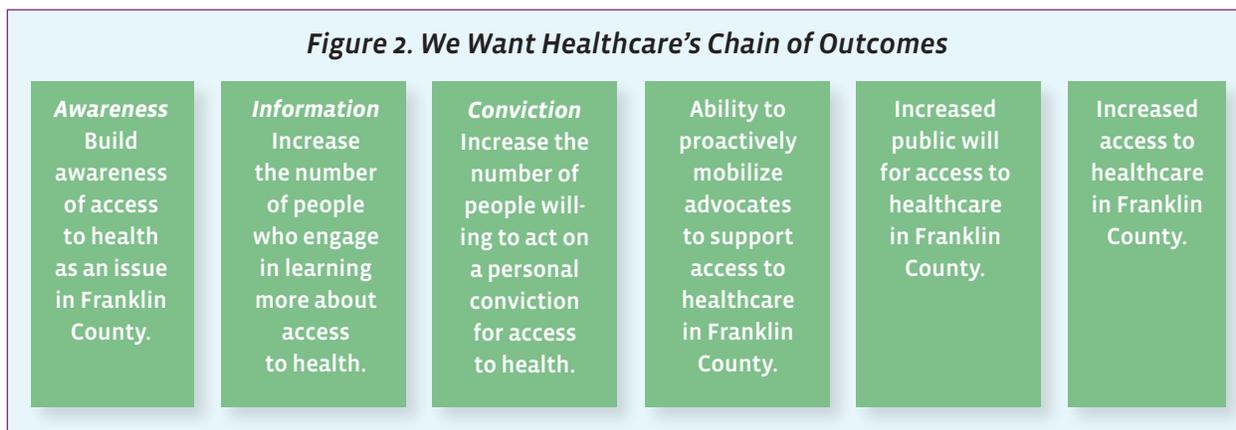
Prior to the TOC session, the **strategic learning coach met with key staff** and through those dialogues determined that building public will for access to healthcare was the core element of their advocacy strategy. This allowed the coach to focus background work on finding a research-based framework that aligned with their approach to building public will. This framework was important as it provided the staff with clearly articulated and research-based assumptions about what their strategies could actually achieve.

The TOC session **began with all of their current activities presented on the wall** using large sticky notes *(see Figure 1)*. Also on the wall were the set of outcomes they promised funders they would achieve.

Figure 1. *We Want Healthcare's Strategies and Outcomes*

STRATEGIES

- Develop toolkit for advocates. Put online.
- Develop training for advocates on advocacy and messaging.
- Develop messages for advocates to use.
- Provide support for advocates to engage in a variety of proactive advocacy activities.
- Assist advocates hosting community meetings on healthcare access.

OUTCOMES

- Ability to proactively mobilize advocates to support access to healthcare in Franklin County.
- Increased access to healthcare in Franklin County.
- Increased public will for access to healthcare in Franklin County.

During the next two hours, the participants (program staff) and the facilitator (strategic learning coach) **explored the research-based framework** brought by the coach. Using that framework, they **discussed the strategies and outcomes posted on the wall from both directions**. Sometimes the dialogue focused on the end-of-the-road question: If you envision increased access to healthcare in the county, what changes need to happen before that can occur? This resulted in their three outcomes being sequenced—from *increased ability to proactively mobilize* to *increased public will* to *increased access to healthcare*.

Participants also realized they had made some jumps in their thinking, from having new advocates to the successful building of public will for access to healthcare. From the research-based framework, they understood that in order to build will, they needed to first build awareness, cause people to want to learn more about the issue and understand it better, and build the number of people with a personal conviction to act on the issue. This realization caused them to create a longer chain of outcomes that added three more to the original three (see Figure 2).

Figure 2. We Want Healthcare's Chain of Outcomes

Awareness Build awareness of access to health as an issue in Franklin County.	*Information* Increase the number of people who engage in learning more about access to health.	*Conviction* Increase the number of people willing to act on a personal conviction for access to health.	Ability to proactively mobilize advocates to support access to healthcare in Franklin County.	Increased public will for access to healthcare in Franklin County.	Increased access to healthcare in Franklin County.

The dialogue also **focused on the beginning of the road** and how the activities they had already identified would assist them in building public will. From the research-based framework, they better understood the cycle they were attempting to create—building awareness, sharing new information, recruiting new advocates who would then build awareness, share new information, and recruit their own new advocates.
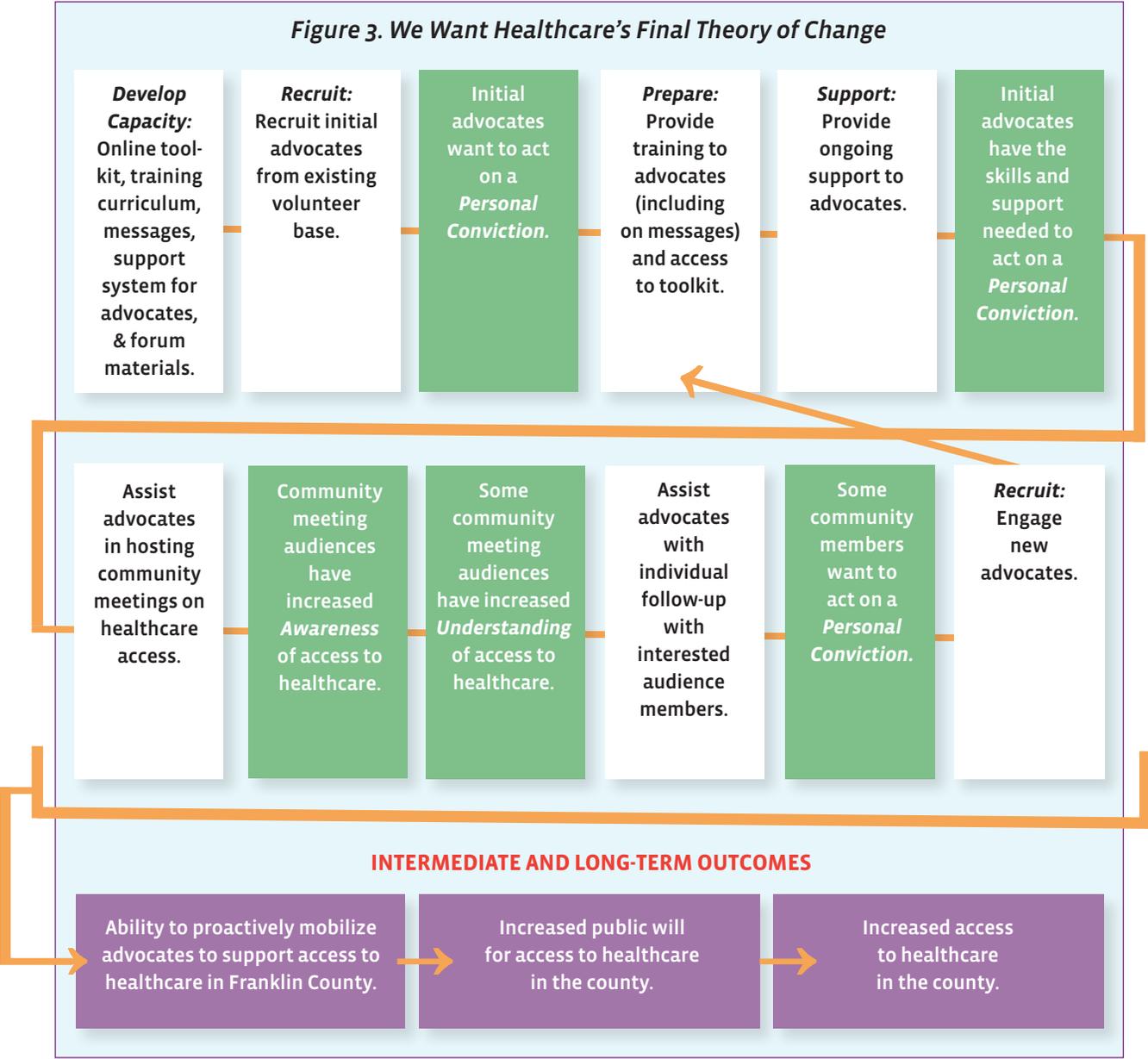
By the TOC meeting's end, participants **came to a collective agreement** that while their originally envisioned activities were still appropriate, the focus on building a core group of advocates who would engage in a variety of advocacy activities would not achieve their desired goal of building public will. Instead, they shifted their focus to supporting advocates to recruit more advocates, while also *building awareness* and *sharing new information* on access to healthcare with community members *(see Figure 3)*.

In addition to discussing their own strategy, participants **checked in to confirm their assumptions** that they and their partners were addressing the policy and political dynamics of access to healthcare outside of advocate recruitment. While public will for access to healthcare was their focus, they chose not to include on their TOC visual, but strongly agreed with, the concept that public will had to be aligned with political will and concrete policy strategies. As a group, they agreed to continue to explore that alignment, which included looking at their other organizations to see where they could establish formal connections between recruiting advocates and developing political will and policy alternatives.

Using the Theory of Change to Focus Strategic Learning
In the weeks after the TOC meeting, We Want Healthcare **explored their strategies and started refining them to focus more on the changes they hoped to cause**. They shifted their advocacy toolkit to focus specifically on building public will rather than on general advocacy strategies. They shifted their training to

focus on community forums, messaging, and recruiting new advocates. They also started the conversation on how to use strategic learning to improve the quality of their activities.

Figure 3. We Want Healthcare's Final Theory of Change

Develop Capacity: Online tool-kit, training curriculum, messages, support system for advocates, & forum materials.	*Recruit:* Recruit initial advocates from existing volunteer base.	Initial advocates want to act on a *Personal Conviction.*	*Prepare:* Provide training to advocates (including on messages) and access to toolkit.	*Support:* Provide ongoing support to advocates.	Initial advocates have the skills and support needed to act on a *Personal Conviction.*

Assist advocates in hosting community meetings on healthcare access.	Community meeting audiences have increased *Awareness* of access to healthcare.	Some community meeting audiences have increased *Understanding* of access to healthcare.	Assist advocates with individual follow-up with interested audience members.	Some community members want to act on a *Personal Conviction.*	*Recruit:* Engage new advocates.

INTERMEDIATE AND LONG-TERM OUTCOMES

Ability to proactively mobilize advocates to support access to healthcare in Franklin County.	Increased public will for access to healthcare in the county.	Increased access to healthcare in the county.

In looking at the outcomes on their TOC, they **identified key opportunities for strategic learning** to improve implementation of their activities and outcomes:

1. Don't assume the initial advocates (recruited from volunteers) have a personal conviction for access to health. Learn from them about where they are starting. Also learn what caused them to want to get more involved. Is there something We Want Healthcare could do to engage their current volunteers even more?

2. Test the messaging. Does it resonate with community members? Who does it resonate with most? Forums could target these audiences.

3. Evaluate the training before the forums start. Did it build the necessary skills and confidence for advocates to host forums and recruit others?
4. Evaluate the forums' implementation. Did they run smoothly, who took on what roles, and did all those roles work? Did recruitment strategies result in audiences who responded to the message? Why or why not? Were the messages used?
5. Evaluate participants at forums to see if they report better understanding of access to healthcare issues and a personal conviction to stay involved. Use results to improve forums and target community members for individual follow-ups.
6. Develop, field-test, and revise tools for advocates to use as they do community member follow-ups to recruit new advocates.

Some of these learning strategies were about the external environment (whether the volunteers they assumed would have conviction did, in fact, have conviction). Others were about the quality of implementation (whether forums ran smoothly, tools for advocates to use). Finally, others were more evaluative and focused on outcomes (training outcomes, forum outcomes). Overall, they designed their strategic learning to ensure they would learn enough at each stage of their work to know if they were ready to move to the next stage.

We Want Healthcare's Strategic Learning Debrief

Setting the Stage

Six months into their strategy, We Want Healthcare had completed their first round of advocate recruiting, training, and community forums. They decided to treat the first round like a pilot and put in place extensive opportunities for strategic learning in order to ensure their second round would benefit from their learning. They also planned to back off their strategic learning activities once they had a high-quality strategy in place.

As part of their strategic learning, they **surveyed all volunteers** prior to the first round of recruiting to better understand their level of conviction and how to best recruit them into activities. The survey was short, not open for long, and the response rate low, but they did learn which healthcare access issues motivated volunteer respondents. They used this information in their recruitment flyers and got an initial group of 24 volunteers.

The organization did **two focus groups on messaging** prior to training advocates. After the first, they tweaked their message to be less focused on healthcare system reform and more on individual healthcare access. After the second focus group they finalized the message and developed their messaging tools.

Pre- and post-tests of advocates' skills and confidence were conducted as they went through the training. Advocates also participated in a messaging focus group on the training's last day in which their readiness to use messages verbally was explored. In response to the finding that advocates were not yet ready, an additional messaging training was held within the next month.

At each community forum, participants completed "reflections" on their experiences **and interest in being involved** in additional access to healthcare activities. A staff member from We Want Healthcare used

a **structured observation tool** at each forum to assess advocate message use and audience response, and collected **audience feedback** verbally after the forum. After the first three community forums, the staff and advocates did an **intense period debrief** to explore implementation and revise it in time for the next round of forums. They realized they had to rethink their press release and flyer approach to recruitment, as most participants were already health advocates in the community. The goal of engaging new advocates might not be possible if they only got the "usual suspects" to their meetings. They used a more personalized strategy for recruitment in the next round of forums, with each advocate recruiting friends, family members, neighbors, members of their churches and activity groups, and colleagues.

Although they used the data gathered from all of the learning activities in real-time to refine their activities and ensure they were ready to move to the next stage, they also wanted to bring the results together and explore their overall approach before moving into recruiting and training community members. For this reason, they scheduled a **Strategic Learning Debrief** with their staff and key advocates and asked their strategic learning coach to facilitate. We Want Healthcare staff brought the majority of findings from their strategic learning process, with one exception. They hired an external evaluator to do the pre and post of the training and the focus group with advocates, so they asked the evaluator to participate and provide the results in a summarized format.

The Strategic Learning Debrief

The facilitator began the Debrief with a **review of the Theory of Change**, asking staff and advocates to talk about the strategies they had implemented in alignment with the TOC. Before moving on, the facilitator let the room discuss the TOC overall and ensure everyone was familiar and comfortable with it, as some advocates had not been present for its development.

The staff member who implemented the volunteer survey **presented summarized survey results** (generated by the online survey program). The advocates in the room talked about their experience taking the
Systematic Data Collection

survey and the extent to which they felt the recruitment strategy built on the answers they provided. An advocate who had responded to the request for advocates, but had not answered the survey, explained that she felt the survey intent was not explained well in the initial email. The group agreed the survey should be revised and repeated to better target the next round of recruitment from their existing volunteers. In having this discussion, they realized one of their strategies would be to continue to recruit from their own base of volunteers, in addition to community members who attended forums.
Collective interpretation leads to changes in strategy

The group then **discussed the training and the forums**. Rather than talk about one activity and then the other, they moved between them, exploring how skills the advocates developed (both by their own admission and as identified during the post-test) contributed or did not to the community forums. They reviewed the results of the reflections and discussed the high level of interest participants reported in staying involved in access to healthcare issues. In particular, they noted the level was high even among participants who reported no previous involvement on the issue. The facilitator paused the conversation to make sure everyone celebrated that accomplishment before they moved on to things that had not worked as well.

Next, they **reviewed the results of the structured observation tool** at the forum, which consistently reported that messages were not being used fully by advocates. They talked about the extra messaging training implemented after the focus group results and wondered why that had not been enough. One advocate pointed out that the message was long and hard to remember and he did not understand why it was important enough to be worth memorizing. In response, staff who managed the focus group talked about the results and how the personal healthcare access message resonated. The facilitator reminded the participants of the research-based framework they were using to understand building public will and how it focused on first building awareness. The participants found themselves with a potentially important question, but one that none could answer: Does having a common message help build awareness of a broader issue? Everyone agreed someone on the team needed to learn more about messaging to better understand what it could help them accomplish and whether they needed to invest more resources in building advocates' capacity and commitment to use the message.

Collective Interpretation

Research Based

Over the course of the three-hour meeting, participants **discussed all components of their strategy that had been implemented, identified a set of changes in their strategies, and identified changes to their strategic learning tools**. By the time they were done, changes to the strategy and learning included:

- Updating the TOC to show ongoing recruitment of advocates from the existing base of volunteers.

Leads to Change in Strategy

- Revising and reissuing the volunteer survey.

- Meeting with a social marketing consultant to better understand what messaging can accomplish, whether it is critical to their strategy, and how to improve the use of it.

- Revising the pre- and post-test tools to focus on skills that had not been developed fully by the previous training, and refining the training related to those skills.

- Implementing the forums in the same manner as before, and only keeping the observation tool if messaging continued to be an issue.

- Moving forward with the individual follow-ups with community members who attended the forums to recruit them into trainings, along with implementing the field testing of tools advocates would use during these follow-ups.

The note taker captured changes to both strategy and strategic learning activities, along with the justifications for each change. These justifications included the research findings, such as the results of the observation tool, and the intuitive and experiential information provided by participants, such as the individual advocate's experience of being overwhelmed by the length and complexity of the message. This documentation was to help staff remember why the change was important and what needed to be changed.

Endnotes

1   In organizational learning, two components that are critical to success are the time for reflection and concrete learning processes and practices—not unlike the concepts of space and structure explored in this brief. For a thoughtful overview of learning organizations that highlights similar concepts to strategic learning, see the Harvard Business Review toolkit by Garvin, Edmondson, and Gino (2008).

2   As the diversity of bodies of theory and research demonstrate, strategic learning is not new. It is a new term for a practice that has emerged time and again in many disciplines, in both the worlds of research and the "real world" of implementation. In some ways, the orientation of action research is the most well established example of strategic learning, though it may not always meet the expectation of real time learning or the small, quick learning that is needed in a strategic learning process. As one action research-er noted, action research allows "all of those involved TO have an opportunity to learn from their experi-ence, and in some cases... start to act differently on the basis of the learning" (Brydon-Miller, Greenwood, & Maguire, 2003).

3   Theories of change have their origins in the literature on evaluation. A comprehensive TOC can assist in ar-ticulation of the causal pathway to be followed for problems that are both complex and complicated. Weiss (1995) makes the case for utilizing theory-based evaluation, outlining four specific benefits of this process:
   • Evaluation attention and resources are concentrated on key aspects of the program,
   • Evaluation results can be aggregated into a broader base of theoretical and programmatic knowledge,
   • Programmatic assumptions can be made explicit and confirmed via relevant stakeholders, and
   • Evaluations that address the theoretical assumptions embedded a given program may be more influen-tial on future policy.

Weiss (1995), similar to many authors of articles on TOCs, sees the benefits through an evaluation lens, while also acknowledging there is value beyond evaluation. One way that TOCs are acknowledged as valuable to the program is through articulating a "big picture" perspective, where program staff not only become more aware of the interim outcomes they are seeking, but may take responsibility for achieving them too (Ander-son, 2005). Strategic learning adds another layer of responsibility, to steadily improve the program's ability to achieve interim outcomes.

4   Building on Weiss (1995) and Connell and Kubisch (1998).

5   JDC Partnerships (2011) describes a completed TOC as meeting three categories:
   • Plausible. Do evidence and common sense suggest that the strategies and related activities, if imple-mented, will lead to desired outcomes?
   • Doable. Will the economic, technical, political, institutional, and human resources be available to carry out the initiative?
   • Testable. Is the theory of change specific and complete enough for an evaluator to track its progress incredible and useful ways?

These categories have some similarities to the strategic learning context, but differ most significantly with the third category of being testable.

6   Any research undertaken in a strategic learning setting should be focused on a specific goal—to generate knowledge that has sufficient credibility, accuracy, timeliness, and value to the stakeholders that it can lead to meaningful change. This orientation toward directly and immediately useful research comes from action research (O'Brien, 2001; Cornwall & Jewkes, 1995). In practice, this means the research has to be implemented collaboratively, with a high level of transparency, free of jargon, and inclusive of knowledge that is generated in multiple ways, including intuitively.

7   Theories of communicative rationality help us to understand the importance of allowing the strategic learning dialogue to include the subjective, objective, and interpersonal dynamics as equally important elements. This type of dialogue is theorized to allow for participants to learn from each other and question assumptions and rationalizations, leading to deeper learning (Habermas, 1984).

8   Two reasons drove the decision to use a composite example. First, each application of these tools is relatively unique. By combining multiple applications into a composite, a more generalized example can be created that is likely to have relevance to many readers. Second, strategic learning is an activity that is inherently internal to the strategy. Exposing the nuance of the learning activity also risks exposing some of the internal processes and thinking of real-life organizations or individuals engaged in learning.

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