



Why Strategic Learning?

Solving the complex social issues of today requires innovative, dynamic approaches, and trying things that have never been done before. Often the innovations with the greatest potential must move rapidly, be adaptive, and respond as the external environment changes. But what is guiding that adaptation? While intuitive learning in the moment is invaluable, it often lacks critical information about what is happening as a result of the strategy. The Spark approach to real-time strategic learning integrates useful and timely data collection into the intuitive learning process that innovators already do naturally, helping them to do good, even better.

DEMYSTIFYING “STRATEGIC LEARNING”

For many people, strategic learning is an idea or a phrase, perhaps something they want to pursue, but often something that is hard to define. For some people, it is part of what they do day to day, but they have a hard time saying what exactly it means or replicating it across different projects.

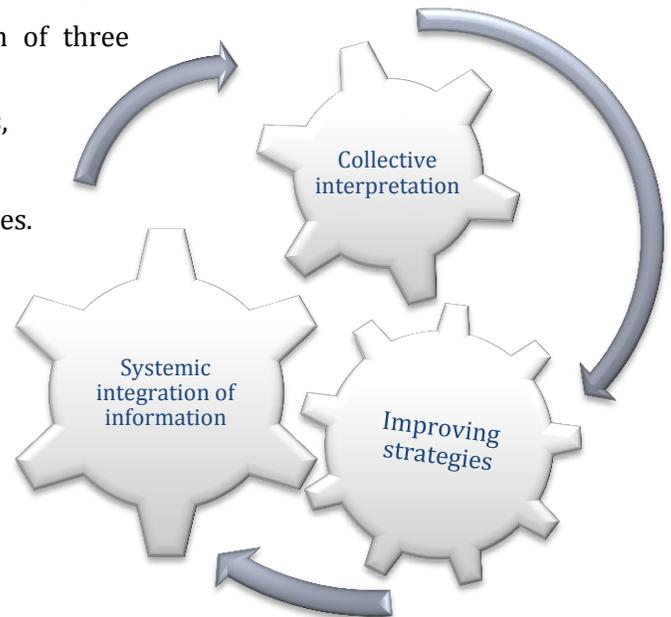
At Spark, we define strategic learning as a combination of three things:

- Systematic integration of information into strategies,
- Collective interpretation of new information, and
- Application of the interpretation to improve strategies.

We also believe that, at its best, strategic learning draws on:

- Research that articulates the relationship between the strategies and desired changes.

Ultimately, we believe strategic learning is something your organization can undertake today to achieve meaningful and timely improvements to your strategies and outcomes!



When is strategic learning needed?

Strategic learning is needed when the outcomes are what matters the most, even if it means adapting the strategies you've always used; when there isn't one road to go down; or when achieving the desired outcomes requires innovation and adaptation.

Where can strategic learning be used?

Strategic learning is a process that is easily adapted and applied in any setting. The Spark model has been used with the philanthropic sector, private businesses, non-profits, and government agencies, as well as with projects that cross multiple sectors.

THE FIVE STAGES OF STRATEGIC LEARNING



STAGE 1: GET READY FOR LEARNING

Before you start your strategic learning process, it is important to define clearly the big-picture strategies as well as intermediary strategies you plan to focus on and decide who needs to be on your Learning Team. In the best practice of strategic learning, getting ready is more than just your best ideas about strategies and their outcomes – it is also about reviewing existing research and models to identify what is truly achievable from your strategies. Picking the right research to guide your strategic learning sets you up for significant, meaningful improvements to your strategy and outcomes.

STAGE 2: DEVELOP YOUR LEARNING ROADMAP

This is the step where you map out your strategies, the outcomes you want to achieve, and use the research you gathered to make sure you are being realistic and focused on what matters the most. The research you collected will help you understand what your strategies can realistically achieve, and your learning roadmap will serve as your guiding document. Sometimes your roadmap will be large and complex – covering many interrelated strategies. Other times, it will be simple, with one or two strategies and the outcomes they can achieve.

STAGE 3: FOCUS YOUR LEARNING ON WHAT MATTERS

Once you have a roadmap, you can explore where you want to focus your learning. Is there a component of your strategy that is new for your organization? Are you expanding a strategy you've implemented before to a new population or setting? You want your learning to be focused on those things you most need to know in order to improve, so you don't waste time learning about something that is interesting, but not directly useful. As a general rule, your learning should tie directly back to your roadmap, and help you assess if you are achieving your strategies and ultimately your outcomes.

STAGE 4: SYSTEMATICALLY COLLECT YOUR DATA

The next step is to pick the right tools for learning. Data collection doesn't have to be fancy and difficult! There are many straightforward, easy ways to collect and use data. When picking a data collection tool, consider whether it will give you accurate information, provide insight into multiple perspectives, provide unbiased information, and provide information that is both useful and timely given what you want to know and when you want to know it. This is also the time to make sure you have a plan for how you can analyze and use the data. You don't want to wait to figure that out until you have an overwhelming amount of data to handle.

STAGE 5: INTERPRET YOUR DATA TO IMPROVE YOUR STRATEGY

Once the data collection tools are designed, strategic learning switches gears. From a planning process, it moves into implementation. You will collect data, analyze or summarize it, and prepare ways of presenting and talking about it with your Learning Team. You will take what you've learned and collectively interpret what it means for your strategy, using the learning to improve your strategy. This is something that can happen on an ongoing basis, occur at predefined times tied to key moments in the strategy, or occur at regular intervals (or all three!). Whatever approach you choose, a strategic learning debrief is a facilitation process developed by Spark that is great tool to help you take your learning and use it to do good, even better.

EXAMPLES OF THE SPARK MODEL OF STRATEGIC LEARNING IN ACTION

Spark utilizes a coaching model to help any organization embed strategic learning into their work. The resource investment is small, but the results are significant. For example, in a multi-grantee foundation initiative, six months into the strategic learning coaching, eleven out of the fifteen organizations involved had used systematic data collection to meaningfully improve their strategies, helping them to expand their reach to desired audiences, improve the quality of their materials and trainings, and ultimately, improve their outcomes. The Spark model of strategic learning has already made a meaningful difference across sectors and issues, including:

- A multi-grantee initiative of The Colorado Trust, designed to build public will for access to healthcare.
- A complex systems change initiative designed to address institutional and clinical barriers to behavioral health services for deaf and hard of hearing individuals.
- A multi-county local Foodshed project seeking to engage many dozens of private businesses, investors, advocates, and public partners in a joint venture to develop an integrated network of production, aggregation, and distribution of local food.

ARE YOU READY FOR STRATEGIC LEARNING?

First, every organization is ready to engage in some level of strategic learning, in part because most organizations already engage in learning. The learning may not be systematic, planned in advance, and based on the highest quality information, but most organizations are figuring out how to do good, even better every day.

However, fully engaging in a strategic learning process does benefit from a supportive organizational culture and some key skills and knowledge. These might be internal to your organization, in your partner organizations, or available as a contracted service.

Every organization is ready to engage in strategic learning, but some may find it easier to begin than others.

Organizational Culture that Supports Strategic Learning

Permission to fail
Purposeful planning and thoughtful preparation
Openness to changing strategies
Focus on the effectiveness of strategies, not just the efficiency
Accountability tied to outcomes
Low turnover of staff at all levels

Skills and Knowledge Needed for Strategic Learning

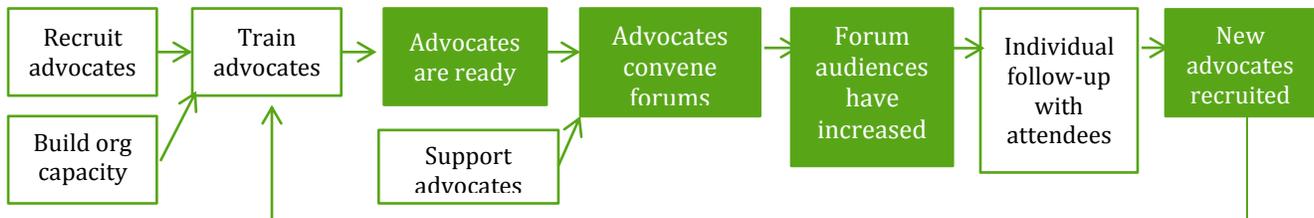
Effective teams that can learn and work together
A strong facilitator
In-depth knowledge of the strategies
Basic research skills
Computer skills
Access to resources to support the learning

Case Study: We Want Healthcare*

We Want Healthcare has a mission of achieving access to healthcare for everyone in their county. They have decided to embed strategic learning into their new strategy to recruit advocates and host community forums.

Step 1: Get Ready for Learning: *Their Learning Team is composed of program implementers, one manager, and an outside evaluator who helps as needed. They also utilize a strategic learning coach for assistance with facilitating the roadmap development and strategic learning debriefs. Their first step, to articulate their strategies, was easy for them. They had a grant proposal that listed their five core strategies and desired outcomes.*

Step 2: Develop Your Learning Roadmap: *Using a public will building framework and related studies as their research basis, We Want Healthcare developed a learning roadmap that articulated key strategies, their outcomes, and strategies to follow (simplified version below).*



Step 3: Focus Your Learning: *We Want Healthcare realized they needed to know what skills their advocates already had and lacked in order to convene community forums. They also needed to know if the training successfully developed new skills. From the forums, they realized it would help to know if the basic process of the forums worked well for advocates as well as whether audiences of the forums changed in terms of awareness of the issue.*

Step 4: Systematic Data Collection: *They began by using a skills assessment with each advocate recruited. A post-test after the training gave information on any remaining skills needed. An activity tracking log, combined with an intense period debrief immediately after each forum, helped to understanding what worked and didn't. The meeting "reflection" forms filled out by their audience gave them information about changes in the audience.*

Step 5: Interpret Your Data to Improve Your Strategy: *The Learning Team used some information immediately, including the assessments of advocate skills, which directly informed the design of the training, and the analysis of the post-test, which identified a need for one more session on messaging. They invited their most engaged advocates to join them in the Strategic Learning Debrief where a mix of intuitive learning and data from the tracking and audience "reflections" helped them identify ways to make the forums more engaging and stay focused on the desired outcome – changes in their audience's awareness.*

** We Want Healthcare is a composite example based on real organizations undertaking strategic learning.*

ARE YOU INTERESTED IN USING STRATEGIC LEARNING IN YOUR ORGANIZATION?

- Contact Spark Policy Institute at: Info@sparkpolicy.com or 303-455-1740.
- Visit our website for more tools and resources: <http://sparkpolicy.com/strategiclearning.htm>
- Visit the Center for Evaluation Innovation for a brief highlighting two of Spark's tools for strategic learning: www.evaluationinnovation.org/sites/default/files/SL_Tools_FINAL%20.pdf

ABOUT SPARK

Spark Policy Institute is a change agent, working with policymakers, governments, foundations, and non-profits to generate dynamic and innovative solutions to society's complex problems. The Spark Team embraces real-time strategic learning as one of their tools for causing meaningful and lasting change. Spark's strategic learning services include implementing strategic learning for complex projects as well as coaching, training, and capacity building to help organizations embed real-time strategic learning into their daily operations.