

# Strategic Learning

St. Luke's Health Initiatives TAP Group

Session 3: August 12, 2015



# Learning Objectives

- Assess your organization's readiness
- Identify your organization's strategies
- Write a strategy as a testable hypothesis
- Assess the rationale for your strategies
- Identify data to gather to test hypotheses
- Compare intended outcomes to actual outcomes
- Improve your strategies in a cycle of learning

# TAP Group Outline

Session 1: Readiness for Strategic Learning

Session 2: Roadmap of our Strategies

**Session 3: Intended Results vs. Actual Results**

Session 4: Turning Understanding Into Action



# Check In

- Your name, organization
- What is your current action hypothesis?
- Brief reflection on your experiences:
  - Hypotheses
  - Roadmap



# Reflections from Coaching

## Nested Hypotheses

- Can you do the “If ...”?
  - If not, you may need a preliminary hypothesis:  
If << we take these preliminary steps >>,  
then << we can do it >>
- Can you measure the “... then ...” in a reasonable time frame?
  - If not, you may need an intermediate metric, providing you with a signpost that encourages you that you are on the way.

# Group Discussion

- Comments or questions?
- Commonalities?
- Learning from each other



# Strategic Learning Frameworks

Strategic Learning frameworks share the common elements:

- Action for a purpose
- Active data collection
- Shared interpretation of data
- Actions are revised with new understanding
- Cyclical approach



# Active Data Collection

- Planned by looking ahead (not back)
- Conscientiously attended to
- Shared and discussed





# Shared Interpretation of Data

- Multiple perspectives
- Enhances learning - you learn better together than as an individual
  - “If you want to go fast, go alone;  
if you want to go far, go together.”
    - African proverb

# Finding the Right Data

## *Part 1:*

If << I do these things >> ,

- Fidelity to intended actions
- Monitoring and record keeping

## *Part 2:*

then << I expect these results >>

- Indicators of success
- Establish a baseline
- Collective interpretation



# Finding the Right Data

If << I do these things >> ,

- Fidelity to intended actions
  - Are you doing what you said?
  - If not, why not?
- Monitoring and record keeping
  - Are you consistent across places?
  - Are you consistent across time?

This is monitoring your *outputs*.

# Data for Outputs

- Take a couple minutes to talk with a partner about how your organization monitors the activities or events.
- Do you do what you say you do?
- Is your organization consistent in implementing programs or plans?
  - Across places?
  - Across time?



# Finding the Right Data

then << I expect these results >>

- Indicators of success (metrics)
  - Feasible
  - Valid
- Establish a baseline
  - Where are you now?
- Collective interpretation
  - Include widest reasonable range
  - Helps strategies be more robust

This is measuring your *outcomes*.



# Data for Outcomes

- Take 5-10 minutes to talk with a partner about how your organization measures outcomes of the work they do.
- Is the plan for measurement of outcomes effective for your organization?
  - Feasible
  - Valid
- Is there discussion and shared interpretation of data?



# Before Action Review (BAR)

A BAR is a learning tool that helps you tap the right people and find the right data.

- Begins with intentions of strategy
- Promotes tangible outcomes
- Uses your history
- Anticipates challenges
- Reminds you of the cycle of learning

# Before Action Review

What are our intended results?

- This is about the overall intent of the strategy - made visible.
- Some people refer to these intended results as the desired *impact* of the strategy.





# Before Action Review

What will success look like?

- This encourages people to visualize success in a way that is easier to measure.
- Some people refer to these measurable results as the desired *outcomes* of the strategy.

# Before Action Review

What challenges might we encounter?

- Uses your experience and knowledge about things you've done in the past.
- Uses your understanding of the people you will be working with.



# Before Action Review

What have we learned from similar situations?

- Asks participants to be explicit about what they have learned.
- Recording this keeps a record for future comparisons.

# Before Action Review

What will make us successful this time?

- Asks participants to be thoughtful about the ingredients for success.
- Turns learning into *different actions*.

# Before Action Review

When will we do an After Action Review?

- Completes the cycle of learning!
- Next session will include After Action Review questions.



# BAR Case Study

- Think about an upcoming event or meeting.
- Would it be helpful to do a Before Action Review?
- Do you want to try this morning?

# More about BARs

- Developed by Fourth Quadrant Partners as part of their Emergent Learning Platform™
- They always pronounce the three letters - B - A - R - instead of saying “bar.”
- Can be used to focus on intent in any kind of event or activity, not just strategies.

# Coaching Follow Up

We will discuss the monitoring and measurement that should accompany your strategy.

- What are the outputs – how do you know you do what you say you do?
- What are the anticipated outcomes?
- Use of the BAR





# Preparing for Next Month

Try a BAR, either in the context of your strategy or elsewhere.

- How does this work for you?
- How did it help?
- What was hard about doing it?

