

## Strategic Learning

Strategic Learning inspires and guides future direction from the failed attempts and successful outcomes of past efforts.

Social innovation within complex systems, such as child welfare and housing, demands a difficult balance between trial and error and responsiveness to those impacted by the service. As new innovative approaches are implemented into our practice and services, we are offered seemingly endless learning opportunities from which we can make quality improvements to the content, delivery and outcomes. However, due to the fast pace and often limited resources of these systems, formal structures, processes and tools to support strategic learning are missing or underutilized.

Consequently, trial and error becomes a zero-sum game in which “pilots” become long-term implementation of a service with macro-level data analysis. While this process may yield learning as to whether or not the service was effective, it often loses the learning that provides insights and lessons as to how and why the service was or wasn’t effective. The use of a strategic learning process supports an organizational culture committed to continuous quality improvement and collective growth and knowledge. Ultimately, Strategic Learning is about deliberately gathering lessons learned in near real time to inform strategic decision making.

“ Learning is an outcome to the extent to which efforts uncover insights key to future progress.”

– Mark Cabaj, President, Here to There Consulting

### What does Strategic Learning mean to us?

Being a learning organization serves multiple purposes: **creating institutional memory**, supporting just-in-time **iteration**, and **clarifying our hypotheses about our work**. **Engaging every staff member** in these learning practices allows us to make our thinking visible to each other, strengthening our hypotheses and uncovering hidden assumptions. By keeping insights, assumptions, and hypotheses at the forefront of organizational consciousness, our learning practices ensure that the design of any future work is informed by the learning of prior endeavors<sup>1</sup>.

Upon initial proposal of a new project, we face many critical decisions and learning opportunities that can lead to a deeper understanding of what works, what does not, and how to purposefully leverage that knowledge to improve future iterations and projects. Through the use of a strategic learning process and set of tools, team members and organizations identify strengths, unexpected challenges, unintended outcomes, and opportunities for improvement throughout the implementation of their project. This creates an environment in which failure is simply a starting place for new ideas and opportunities to improve. Such an environment encourages meaningful conversations about why something failed, what could be done differently, and how to plan to avoid similar failure in the future.

### How the ICFW is using Strategic Learning

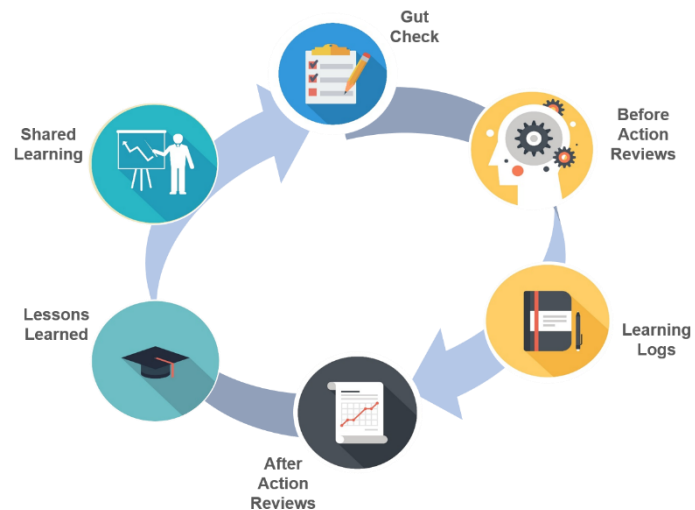
As the ICFW serves as a translational organization, it is essential that our decision-making, planning, learning and dissemination function fluidly and efficiently. While there is no shortage of

new innovative approaches to improve child and family well-being, our team must be strategic in identifying, selecting, implementing and testing in order to be effective in each phase of this process within our organizational capacity.

Beginning in early 2019, we implemented the formal use of our Strategic Learning process:

1. Gut Check
2. Before Action Review
3. Learning Logs
4. After Action Review
5. Lessons Learned
6. Shared Learning

The **Gut Check** serves as a strategic decision-making tool that helps us align project proposals with our mission, values and growth priorities; frame clearly why, how and what; define the correct starting point; and determine if we have the capacity and/or plan to implement and sustain the project. Upon completing the Gut Check, the team member(s) present it to the team, answer questions and provide needed clarification and/or justification, and then receive confirmation of acceptance or denial.



The **Before Action Review** is conducted prior to an activity or event to help clarify desired results; plan for anticipated challenges; set clear goals and action steps; and define roles.

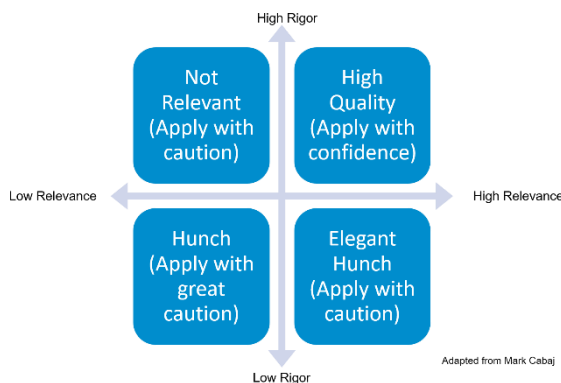
**Learning Logs** are our platform where we share insights and reflections on work that we're doing—from the clinic to meetings to thoughts that arise in the course of writing, reading, or meeting new people. The log serves a **knowledge management function**, and allows us to track how our thinking and work with others and within our systems evolve over time.

The **After-Action Review (AAR)** is conducted after an activity or event to help reflect on what actually occurred versus what was intended; identify potential ways to improve the next time; and share what we have learned. By contrasting our intended results with our actual results, we can begin to surface important insights and lessons learned. These, ultimately, inform how we proceed – what we sustain and what we seek to improve in another iteration. The AAR and its lessons learned then contribute to dissemination and to a new cycle in which our lessons are further tested. We use the After Action Review throughout the implementation of an activity or project as it can identify opportunities for learning at both a micro- and macro-level.

**Lessons Learned** are developed through the review of Learning Logs and After Action Reviews, and then are validated by others that have been involved in the learning process. Through the validation process, we survey those involved in the learning process to determine the rigor and depth of the lesson while also gauging the relevance of the lesson in their practice.

The matrix (see diagram) provides guidance as to which lessons have greater impact and how that determination may lead to future direction and learning.

We conduct **Shared Learning** upon completing the Lessons Learned process, through which we disseminate our initial successes, challenges, and opportunities for improvement and future learning.



### What have we learned from our Strategic Learning process?

Our early experience with the ICFW Strategic Learning process has yielded the following:

- Through the use of the **Gut Check**, we have facilitated our project proposal and approval process by developing boundaries around our audience, growth and learning potential, timelines and deliverables. This process has led to difficult decisions that resulted in more targeted proposals and avoiding missteps that we had made in the past.
- Nearly 400 **Learning Logs** completed and shared by a team of 10 members in our first year of conducting them. The content of the Learning Logs has served as a consultative space for the team, a catalyst for deeper, more targeted conversations in supervision, and the development of a virtual “learning resource center” on Basecamp, an online project management platform, that our team can refer to for future use.
- We have developed Focused **Learning Logs** that have a specific topic that is currently relevant in our practice, which will lead to a robust toolkit for fellow practitioners and families that may benefit from the collective knowledge.
- We have completed nearly 40 **After Action Reviews** that have led to a foundation of qualitative evidence that enables reflective evaluation of change efforts through **Outcome Harvesting**, while also informing updates to our strategic direction on our Clinical Services Integration project.

If you’re interested in learning more about Strategic Learning, please explore these resources:

- The ICFW first learned about the Gut Check at the **Tamarack Institute’s** 2018 Community Change Festival from George Aye, an expert in social innovation and co-founder of **Greater Good Studio**.
- IDEO’s **“Field Guide to Human-Centered Design”**, a tool that we use frequently to support our innovation efforts, has its own version of a Gut Check.
- **Mark Cabaj** is an expert in systems change evaluation, and a strong ally of ICFW’s exploration and implementation of strategic learning processes and tools.
- The AAR was developed by the United States Government, and is used by **USAID**.

### Citations

Cabaj, Mark (2019). Developing Lessons Learned. Available online: <http://here2there.ca/wp-content/uploads/2019/01/Developing-Lessons-Learned-2.0-final-2.pdf>

Center for Community Investment <https://centerforcommunityinvestment.org/>

Quinn Patton, Michael (2011). Developmental Evaluation: Applying Complexity Concepts to Enhance Innovation and Use

<sup>1</sup> <https://centerforcommunityinvestment.org/blog/what-does-it-look-be-learning-organization>