Overview of the Presentation

1. Why Learning Matters
2. Why Doesn’t Evaluation Directly Lead to Learning?
3. The Ideal Strategic Learning Process

Leadership Matters

Leadership is the key to:

- Sustainability
- Lifecycle Advancement
- Effectiveness
There’s More to Leadership…

- Advancing effective communication of mission and vision to internal and external stakeholders
- Engaging internal and external stakeholders in planning
- Taking decisive action when faced with challenges
- Making decisions anchored in cost-effectiveness
-Demanding accountability that includes demonstrated success with those being served/targeted

Only one in four nonprofit organizations are well led…

And, The Key to Leading Is Learning

The following set of organizational learning behaviors are significantly and singly the biggest predictor of organizational leadership:

- Creating sophisticated financial, operational, programmatic and environmental data-gathering and learning processes
- Spending time leveraging evaluation data for making meaning, decision making and planning, not primarily for accountability or validation
- Infusing learning into ALL planning, anchored in program success
- Taking immediate and decisive action, particularly at a human resource level, as indicated by evaluation findings

Only one in four nonprofit organizations are effective learners…

Why Doesn’t Evaluation Lead to Learning?
A Field Recognized Definition for Evaluation

“The systematic collection of information about the activities, characteristics and outcomes of program use by specific people through what intentional learning process… to reduce uncertainties, improve effectiveness and make decisions with regard to what those programs are doing and affecting.”

Michael Quinn Patton
"Evaluation Essentials for Small Private Foundations"

Or, a method for finding out what happened, how & why…

Seven Steps in Evaluation

1. Identifying and organizing the decision-makers
2. Determining who will conduct, participate in, and be the audience for the evaluation
3. Developing a logic model
4. Stating the evaluation questions and indicators
5. Developing the evaluation workplan, including the evaluation design, methods, tools, and tasks
6. Gathering, analyzing, and interpreting the data
7. Using the evaluation findings

Evaluation: Using the Wrong Model

Resources | Strategies | Short-Term Outcomes | Long-Term Outcomes | Community / Social Impact
**Evaluative Learning: Changing the Model**

- Resources
- Strategies
- Achievable Outcomes
- Research says...
- Community / Social Impact

**Shifting Evaluation to Learning**

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<th>Accountability Focused:</th>
<th>Accountable-based evaluation: evaluation efforts that answer one or more of the following questions:</th>
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<tr>
<td>Did it Work?</td>
<td>- Did our program achieve the ultimate outcomes for the clients we serve?</td>
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<td>- Did we implement the whole program as designed?</td>
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<td>- Was the whole program effective enough to justify the cost in terms of money and level of effort?</td>
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<tr>
<th>Learning Focused:</th>
<th>Evaluative learning: evaluation efforts that answer the following questions:</th>
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<tr>
<td>What Worked?</td>
<td>- What level of attainable client outcomes were achieved and how did specific groups of clients differ with respect to their level of outcome achievement?</td>
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<td>- What specific program practices were most important to achieving the attainable outcomes, how do these program “best practices” differ for specific client groups, and why?</td>
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<td>- Which specific program practices were so effective that when funding levels change they should be the last to go or the first to grow?</td>
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**The Ideal Learning Process**
Learning: What It Is & Isn’t

Learning Is Not...
- Evaluating
- Assessing
- Managing Knowledge

Learning Is...
- Making Meaning
- Explaining
- Challenging and Changing Assumptions

The Prerequisite for Leading is Learning!

Definition of a Learning Organization

A learning organization is one in which
“people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.”

Definition of a Learning Organization

Typical Learning Model

Typical Learning Model
Data-Driven Learning: A New Paradigm

CCAT says, “When learning looks like this, organizations are significantly and markedly better led, sustainable and effective. Yet, only 9% of all nonprofits are Strategic Learners.”

Steps for Learning

First, Uncover the “Real” Outcomes

- It's all about the path to behavior change:
  - Awareness
  - Knowledge
  - Attitude
  - Motivation
  - Skills
  - Opportunity
  - Behavior
Identify the Achievable Outcomes

1. What’s the big impact your program/effort/initiative is trying to create? (discussion)

Example: Parent Involvement Program in their Child’s Education (in the school)

- Kids finish High School

2. What does research say as to the behaviors [of individuals and/or groups] that relate to your program that precede, predict and/or are prerequisites for achieving the big impact? (research, literature review, asking experts)

Example: Parent Involvement Program in their Child's Education (in the school)

- Parental oversight and assistance with homework
- Parental communication and engagement with teachers

Identify the Achievable Outcomes (cont.)

3. Which of these behaviors (outcomes) are your program(s) most directly trying to achieve/change? (these are your direct behavioral outcomes; discussion & reflection on research)

Example: Parent Involvement Program in their Child's Education (in the school)

- Parental communication and engagement with teachers

4. What outcome steps are your programs/efforts directly affecting along the path to the desired behavior change? (discussion & reflection on research)

- Awareness & Knowledge Change
- Attitude & Motivation Change
- Skills Change
- Opportunities Change

Example: Parent Involvement Program in their Child's Education (in the school)

- Parent awareness and knowledge of how to navigate the school & teacher engagement process
- Changing motivation of parents to make time to be in the school
- Skills and confidence of parents to serve as advocates for their child’s educational needs

AKAMSOB Exercise...
1. What do the field, research, and experts conclude about the qualities/best practices, target audience background "readiness factors" and resources that matter and/or must be in place if the program/effort is to succeed? (research, literature review, talk to experts & discussion)

Example: Parent Involvement Program in their Child's Education (in the school)
- Quality training on the school context (how it operates and the role of administrators and teachers)
- Quality 1:1 support from other parents who are alumni of the program
- Quality learning exchanges with teachers, through the program, where parents feel safe asking the tough questions
- Parents coming with committed time to devote to being in their child's school
- Schools that make administrator and teacher time available (opportunity) to parents, on a frequent and regular basis

2. What do you all (program/effort stakeholders) conclude about the qualities/best practices, target audience background "readiness factors" and resources that matter and/or must be in place if the program/effort is to succeed? (research, literature review, talk to experts & discussion)

Program Quality Exercise...

Develop a Logic Model
Gather Data

Don’t get hung up on research design and methods; just follow these principles:

1. Choose methods (qualitative & quantitative) that can be feasibly & efficiently carried out.
2. Identify data collection tools that have already been created by others. If all agree that they accurately, truthfully and consistently measure what we want measured; if no tools exist, develop them.
3. Use and/or develop data collection tools that do a good job of being tough (unearthing if nothing changed & what didn’t work) rather than laudatory (tell me how great this was & that you are changed forever).
4. All tools need to be broken into four SEPARATE sections: a) what changed for you? (outcomes); b) what program qualities/elements, and how much did you experience about the program? (program quality); c) tell us about you (background traits that might matter); and d) what were you already doing and/or have before you came to us that helped you achieve the desired change, if anything (readiness).

Gather Data (cont.)

Don’t get hung up on research design and methods; just follow these principles:

5. Gather information from the audience, not the implementers.
6. Gather enough voices that program stakeholders would agree that, “this size and make-up of group of people represents the range of background factors and program experiences we see day-to-day.”
7. Ask audiences very specific questions (e.g., how much would you agree with the statement that [a very particular] best practice was provided), not abstract ones (e.g., were you satisfied or happy?).
8. Don’t ever ask people to draw their own cause-and-effect conclusions at the time of collecting the data (i.e., what made a difference for you?).
9. Time data gathering with enough headway to use for planning.

Group Sharing on Experience w/Principles
**Analyze Data**

Hold one or more meetings and go through the following process:

1. Determine and/or come to agreement on who (among the audience on which you have data) represent the top 25% to 33% with respect to achieving the achievable/desired outcomes.

2. Ask of this sorted data the following questions:
   - What program qualities/ingredients appear to distinguish/differentiate the top outcome group from the rest?
   - What background characteristics (if any) distinguish/differentiate the top outcome group from the rest?
   - What readiness factors/outcomes (i.e., awareness, knowledge, attitude, motivation, skills and/or opportunities) were already in place for the top group that were not there for the others?

3. Finalize conclusions about what worked, for whom and why.

**Make Meaning**

Hold one or more meetings to discuss the following:

1. What do the conclusions tell us about how we should improve the program in terms of strengthening what worked and creating new and innovative solutions to what didn’t work?

2. What do the conclusions about what worked tell us about how we should resource our efforts differently? What resources do we need more, the same and/or less of?

3. What do these resources cost?

**Make Meaning (cont.)**

Hold one or more meetings to discuss the following:

4. What do the conclusions tell us about how we should manage our program/strategy resources better?

5. What do the conclusions tell us about the case we need to make to investors, donors, funders and the community?

6. What do these conclusions tell us about further learning we need?

7. What conclusions do we disagree with, and why?
Hold one or more meetings to decide the following:

Modify and/or develop a plan of improvement
- Goals
- Garnering resources
- Strategies & Tactics
- Roles & Responsibilities
- Managing resources
- Strengthening strategy implementation
- Improving & leveraging the learning

Question & Answers