Coaching for Strategic Learning:

Lessons for Nonprofits and Their Funders

Presented

by

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In the summer of 2013, the Spark Policy Institute and The Colorado Trust (TCT) asked us to conduct an external review of the TCT initiative known as, "Building Public Will for Access to Health." This innovative grantmaking strategy, launched in 2010, had engaged Spark Policy in serving as strategic learning coaches to both TCT and its grantees. Now, at the close of the three-year grant period, both Spark and TCT sought an independent assessment of the value and effects of the strategic learning coaching.

Our investigation relied primarily on an extensive document review and set of structured interviews.

- The Spark Policy Institute shared a wealth of both internal and external materials which proved invaluable to understanding this complex endeavor. These included the set of original grant applications; multiple iterations of both the overall and the site-level theories of change; data collection tools; and the grantees' "Learning Reports." In particular, Spark Policy's meticulous coaching logs, internal documentation of progress for each site, and meeting notes from their Strategic Debriefs shed light on both the trajectory and the outcomes of the coaching effort.
- Our in-depth structured interviews were conducted shortly after the project's close, providing participants with a ripe opportunity for deep reflection. We spoke with a total of 13 informants representing The Colorado Trust, individual grantee sites, the Spark Policy Institute, and Spitfire Strategies.

Our independent review and final report were always intended for an internal audience. However, in 2014, TCT generously agreed to share out the attached "key findings" section of our report as part of our AEA presentation. The full report includes case narratives of selected grantee sites and a documentation of our methodology.

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COACHING FOR STRATEGIC LEARNING

KEY FINDINGS

INSIGHTS FROM THE EXPERIENCES

OF

BUILDING PUBLIC WILL FOR ACCESS TO HEALTH

PREPARED FOR

THE COLORADO TRUST AND THE SPARK POLICY INSTITUTE

BY

CAROLYN COHEN

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COACHING FOR STRATEGIC LEARNING

Background

This independent review was tasked with examining the strategic learning (SL) coaching experiences of The Colorado Trust and two of its grantees, Together Colorado and the San Luis Valley Regional Medical Center. Representatives from these organizations were asked to reflect on the strategic learning experience as a whole; in what ways, if any, the coaching made a difference in meeting their grant objectives; and which elements of the process, if any, they found useful or challenging.

The results are presented in three sections. Section 1 describes key overall findings and highlights the perspectives expressed by interviewees from the Trust and Spitfire Strategies. Sections 2 and 3 provide rich insights into the strategic learning coaching experiences of the two grantee sites. This package of narrative and analysis is intended as an internal document for use by The Colorado Trust and Spark Policy Institute. Findings should contribute to better understanding the benefits, challenges, and utility of strategic learning coaching in optimizing grantee effectiveness and achieving funding objectives. That said, it is important to consider that interview scope and time was limited. These findings should be considered in light of the full experience over the three years of the project.

KEY FINDINGS

The strategies that we are moving forward with deal with messy topics, things that were not linear...I really see strategic learning as almost essential to those types of strategies. (TCT)

Section 1 uncovers key findings and considerations that may be useful in informing future strategic learning coaching efforts. This section first identifies three unique elements of the strategic learning approach and provides participant insights on how these factors supported an adaptive learning process. Next, feedback on specific elements of the coaching, and how the coaching experience fostered an ethic of intentionality, are summarized under the heading, "The Intentional Feedback Loop." Finally, an array of ideas and suggestions that surfaced during the investigation is noted under, "Moving Forward."

Unique Elements of the Approach

Spark was asking our team questions that might challenge our assumptions or some of our rationale. It challenged some of the things we would have kept doing just because we had planned to do them. ... It prompted us to have to do what we were asking the grantee partners to do. (TCT)

Trust interviewees clearly felt that a strategic learning orientation was the right match for their Public Will Building (PWB) initiative. Even so, investing in coaching grantees to collect and use real-time data was an untested means of achieving project outcomes. Three unique elements of this approach surfaced in the interviews.

<u>Supporting Adaptation over Accountability to Pre-Identified Plans</u>
Grantee and Trust interviewees alike believed that the strong signal from TCT that it was funding grantees to learn and adapt, rather than sticking to and reporting on pre-identified plans, was "a new way of doing business." One TCT interviewee said, "Working in a dynamic evolving environment, and needing to be able to adjust your approach in a real-time manner is pretty different than how a lot of foundations work— including the Trust." Grantees expressed appreciation for being encouraged to iteratively adapt from real-time learnings, rather than being required to stick with plans agreed on in proposals. One interviewee said that his "aha moment" was hearing Spark staff explain that the Theory of Change is meant to support adaptability and that it is best to think of being "wedded to the outcomes, not necessarily how you get there."

<u>The Trust as a Learning Partner</u>
Representatives from both the Trust and grantees commended the Trust for modeling its own engagement with strategic learning. Trust interviewees said that they gained insights into grantee experiences, including what it was like to "learn on the fly," reflect on mistakes, and find themselves in "an uncomfortable zone." Both the Trust and grantees commented that when the Trust acknowledged "missing the mark" at convenings it fostered a sense of partnership. Grantees said this reassured them that the Trust staff meant it when they said that the project was about "learning as you go."

<u>Messaging + Measurement</u>
The PWB strategy, with its emphasis on a common message framework, required a unique collaboration in evaluating messaging efforts with Spitfire Strategies as the message trainer, and Spark Policy as the strategic learning coach. One Trust interviewee noted, "What was most helpful was having that really intensive technical assistance and support from Spitfire and from Spark. They were able to help each grantee group find a right way for it to stay true to the project that the Trust was funding them to do in a way that was comfortable, and a fit for their organization." Spitfire Strategies reported that the concept of measuring individual grantee alignment with messaging was a new experience, and that while it posed some challenges, it "became useful and workable." Additional insights on the Spitfire/Spark intersection are noted in "Moving Forward: Issues for Further Consideration" below.

The Intentional Feedback Loop: Inquiry ⇔Reflection⇔ Adaptation
I don't think the learnings would have been possible without the intensive expertise and feedback loop.
(TCT)

The queries around the effectiveness and the effects of the SL coaching surfaced language time and again around how the process fostered "intentionality." Across the interviews, the feedback detailed the ways that the coaching encouraged intentionality: in defining outcomes; choosing what data to collect; and raising questions about outcomes and their implications. This intentionality was described in multiple ways. One of the Trust interviewees spoke of how the coaching process facilitated thoughtfully "connecting the dots." He also identified the value of convening "checkpoints" where either on their own, or facilitated by Spark, the team reviewed data and asked questions that challenged their assumptions. In fact, a key characteristic of these comments— from grantees, TCT, and Spitfire – centered on the value of having Spark ask, and model asking, tough questions. As one grantee said, "The transformation for me had to do with the kind of questions we were bringing to the data." Collective findings on what worked and what was challenging in the process are highlighted below.

The Theory of Change as a North Star. The Theory of Change (ToC) was valued as both a process and an ongoing guide. Interviewees said they gained a new understanding of how to define an outcome, used the ToC to orient new staff, and referred to it for checking on direction throughout the project.

Encouragement to Value both Formal and Informal Data. Both TCT and grantee interviewees referred to how the strategic learning coaching validated their use of informal data, while at the same time guiding them in implementing more formal data collection procedures. Encouragement to value both informal and formal data seemed to honor their depth of experience and intuition about their work, while also supporting them in honing new evaluative skills.

Institutionalizing Reflection Time. The value of institutionalizing time for reflection, especially via the Debriefs, was mentioned multiple times and was often coupled with language around how these sessions fostered intentionality about the work. These comments were often expressed hand-in-hand with appreciation for how the coaching posed—or modeled how to surface—challenging questions. As noted above, one or more interviewees at each of the case sites commended Spark's ability to pose tough and useful questions.

The value of formal team reflection time was consistently noted. The challenge of carving out time for reflection was uniformly noted as well. There were some comments about "learning fatigue" and suggestions to experiment with making the Debrief sessions shorter. A caution was raised to keep in mind that not all reflection can be saved for the Debriefs, as one interviewee said, "I would say that the Debriefs were really important, but I would also say that I don't think the Debriefs would have been as effective without ongoing informal interactions along the way." (TCT)

Progressing from Findings to Action Steps. The informants observed that while institutionalized reflection is vital, the proof is in the pudding—as one of the Trust interviewees noted, time needs to be allocated to acting on findings as well as discussing them. One said, "Processes need to be in place to be able to listen to those lessons."

Moving Forward: Issues for Future Consideration

I would commend TCT for taking this approach because many, many ... other organizations... either don't measure their effectiveness or do it a much less rigorous way. (Consultant)

As TCT continues to direct its attention towards addressing complex social issues, insights from these interviews may contribute to thinking on development of future grantmaking strategies. Some of the findings in this section are outside of direct feedback on the coaching, but may be useful in informing future endeavors.

1. Conveying the Strategic Learning Concept
In analyzing the interview findings, it appeared that there may not have been uniformly clear understandings about which part of the work was strategic learning and which was evaluation. Representatives from the Trust observed this challenge as well. One reflected that with both grantees and internally at TCT,
>   *People conflated the notion of strategic learning and evaluation. They saw strategic learning as accountability in the sense that it was punitive the way that a lot of people see evaluation,*

unfortunately, rather than being about learning and improvement and how data and other sources of information can support strategy level improvements....I am not quite sure, to be honest, if some grantees got it, even now. Or if they just saw it as another thing the Trust forced them to do.

In a related point, there were comments by grantees about being overwhelmed by new terms and jargon, as one interviewee said, "The growth curve of learning the language was really intense." Another fleshed out the problem and offered suggestions for the future:

It took us a long time to understand the language of strategic learning and the language of the Theory of Change....We have an organizing model that closely mirrors the ToC, but it took us a long time to understand that the Theory of Change was not any different than model we used, but more specified to building public will for access to health.... A vocabulary list would have been helpful. If we had a chance to present our model and then some negotiation about language, or to develop a glossary so (we saw that) the Trust wants to see champions and advocates built, (at our end) knowing that ... advocate equals "lay leader", that would have helped. If they had met us more where we were at it might have been easier for us in the beginning.

2. Communicating Expectations

   Strategic learning practices and coaching were a new experience for TCT as the funder, and the grantees as participants. There were several comments that time commitment and expectations should be made clearer at the outset. Grantees talked of being "confused and overwhelmed" at the beginning. Likely, the pilot experience will inform future communication efforts. Comments on this issue included the following:

   - *One of the downsides, we heard frequently, and it is on the Trust's responsibility, we didn't really set this up for them very well in terms of strategic learning piece. (TCT)*
   - *We didn't get how demanding it would be....It wasn't clear enough what was being built in. (As a result of not having a clear understanding) our top management needed to buy into this in a way I don't think they did....(Grantee)*

3. Moving Forward with Messaging +Measuring

The pilot experience of melding two sets of coaches, one focused on messaging (Spitfire) and one on real-time learning (Spark), yielded interesting insights and questions. The theme of intentionality came up repeatedly as informants talked about how real-time learning around their messaging efforts prompted them to think deliberately and iteratively about their work. Three lesson areas were identified:

   - First, consultants should be clear about each other's roles upfront and stay in close communication throughout the project. This is necessary in a case like PWB where grantees considered the consultants' roles somewhat interchangeable. As interviewees noted, the line of responsibility for message coaching was somewhat blurred, and in some cases, grantees called on one firm (Spark or Spitfire) when they should have called on the other. As a result, it became incumbent on the consultants to be in communication with each other. One consultant advised, "In future collaborations, I would recommend to communications consultants to work more closely with the evaluation team from the outset to reinforce each other in a mutual way and not think of our work as separate."

- Second, there are significant challenges to implementing consistent measurement practices across a diverse group of grantees. The PWB case may have been especially challenging due to the broad diversity among the grantee organizations as well as their use of different types of communication strategies. "It is tempting to throw up your hands and say everyone will do it their own way and as long as they are not doing something counterproductive, then we are okay. (However) in this case ... (the strategic learning) gave everyone an incentive to look carefully at what they were doing.... That discipline was helpful." (Consultant)

- The third issue, raised by an interviewee, is the need to assess in what cases this level of rigor around measurement and real-time data collection is most needed, and how to find "the sweet spot of just enough to tell you that you are on track". There were related suggestions for the project/consultants to determine and agree on which parts of the message are mandatory upfront, before the work gets off the ground, and then to clearly communicate to grantees how much leeway they have in customizing the message and what they are "being graded on".

And a final insight from Spitfire Strategies on the communication/strategic learning partnership:

Few projects...invest the resources in really rigorous quantitative analysis of the work that they do, so we had to put hard thought into what do we mean when we say people need to use this message box consistently. (That process) made Spark more knowledgeable when it comes to the tricky business of evaluating communications, and it made us smarter when it comes to thinking about what it means to be effective.