



INVITING CLIENTS INTO “OUR TENT”: HOW TO PREPARE AND LEAD A STRATEGIC LEARNING DEBRIEF DEMONSTRATION SESSION #671

BACKGROUND

The Comprehensive Health Education Foundation (C.H.E.F) is based in Seattle, Washington. Its mission is to create enduring health equity and to ensure that all people have equal opportunity to lead healthy, whole lives through uniting community wisdom, emergent practice and effective policy. C.H.E.F. has recently transitioned its focus to community-based health solutions. In developing its new work, C.H.E.F. contracted with Cohen Research & Evaluation, LLC, to facilitate an ongoing strategic learning process and to conduct external evaluation activities. Quarterly Evaluation and Strategy Learning Circles are included in both the contractual agreement and evaluation plan.

EVALUATION AND STRATEGY LEARNING CIRCLES PURPOSE

We view the Learning Circle (LC) as an integral part of C.H.E.F.’s strategic learning approach. It provides iterative opportunities for the organization’s leadership, project staff, and participants to examine real-time data; reflect on the strategic implications of findings, and identify action steps.

SETTING THE STAGE: WHAT HAPPENS IN THE PROCESS PRIOR TO LAUNCHING LEARNING CIRCLES

Start with Appreciative Inquiry. A success based approach honors all voices and establishes the trust needed when working in a dynamic change environment.

Articulate Underlying Assumptions. This forges group agreement about the nature, meaning, and expectations of the work.

Develop a Theory of Change. The ToC must be seen as a dynamic document, but at the same time lays an agreed on foundation for discussing project outcomes.

WHAT HAPPENS IN ADVANCE OF EACH LEARNING CIRCLE SESSION

Identify one salient strategic question. Client and evaluator collaborate to identify the most pressing need to address.

Data collection. Data are collected by both evaluator and project staff. Evaluator prepares advance memo and PowerPoint presentation on findings.

State participant expectations. An advance agenda clarifies participant roles for each session.

THE LEARNING CIRCLE FORMAT

The Learning Circles are convened quarterly, for two-hour sessions. Each session follows the same format.

Set the stage for reflection. Facilitator reviews purpose and expectations of LC, and may use a short video or quotes to illustrate. A clear written agenda underscores direction and purpose.

Note progress towards outcomes. Selected participants share stories of progress towards outcomes; these are posted on the Theory of Change graphic.

Frame strategic question. The team leadership and facilitator review why this issue demands attention.

Review new data. Both project staff and facilitator share new findings relevant to the question at hand.

Identify action steps. Most of the agenda is dedicated to discussing implications of findings, strategic considerations, and potential action steps.

WHAT HAPPENS AFTER THE LEARNING CIRCLE

The LC supports C.H.E.F. in moving toward action steps. Staff record progress towards outcomes in an Excel Sheet, and document the discussion. The evaluator sends a follow-up memo to attendees. At the internal level, results are incorporated into an array of strategic decisions and follow-up action items.

Project Director follows up with team. Action items are incorporated into weekly supervision with project coordinator, other staff, and project participants.

Applying data to strategy. The LC discussion informs ongoing decisions about what aspects of the project to continue and what to cut; uncovers new areas for project development; identifies needs for training opportunities; and surfaces areas where further clarity and new thinking is needed relating to the scope of work and overall project direction.

Kathy Burgoyne, PhD., leads C.H.E.F.'s efforts to create equal opportunity for health by collaborating with key organizations to provide innovative and effective health education and prevention programs for people who are most affected by health inequities. kathyb@chef.org

Carolyn Cohen, M.Ed., is the owner of Cohen Research & Evaluation, LLC, based in Seattle, WA. She works collaboratively with clients, using strategies such as Evaluation Learning Circles and Appreciative Inquiry to build evaluation capacity, facilitate the use of results for strategic learning, and effect social change. cohenevaluation@seanet.com