

Building Capacity to Learn



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American Evaluation Association 2019



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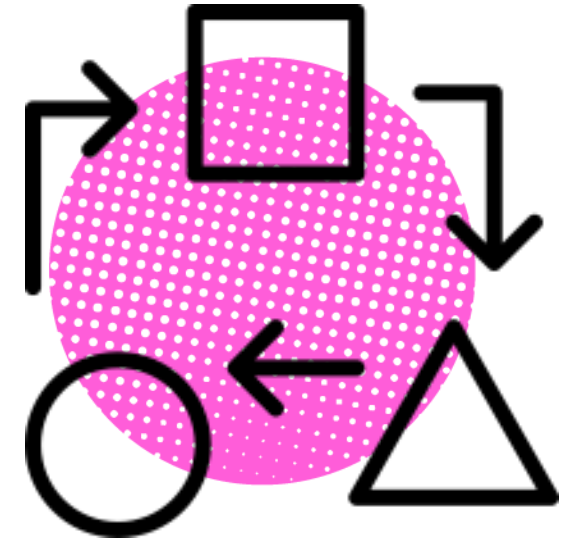
Tanya Beer

FRAMING

While we talk a lot about learning,
we lack clarity on what it means and takes,
which ultimately risks it meaning nothing.

You will learn:

- How to identify and influence **factors that shape our ability to learn**
- Practical strategies and tips for how to build **learning cultures that stick**
- How to cultivate **strong learning relationships.**



We jump too quickly to tactics and tools for supporting learning.

Let's get clarity first on what we are aiming for, and our rationale for getting there.

You don't plan a strategy, you learn a strategy.

Henry Mintzberg



The capacity to learn and adapt is of greater value than any specific “lesson learned.”

Marilyn Darling, Fourth Quadrant Partners



Being strategic about supporting learning requires:

1. Clarifying the results you want—What are you aiming for with your learning work?
2. Diagnosing the systemic factors that are getting in the way of learning or helping to support it.
3. Getting tactical about what you can do to address the roadblocks and support the facilitating factors.

What are we aiming for?

Strategic learning is
a way of working—
*a set of developed
capacities and
regularly-practiced habits.*

We propose five habits will improve
our strategic learning.

behaviors
practiced
day-to-day in
how we interact

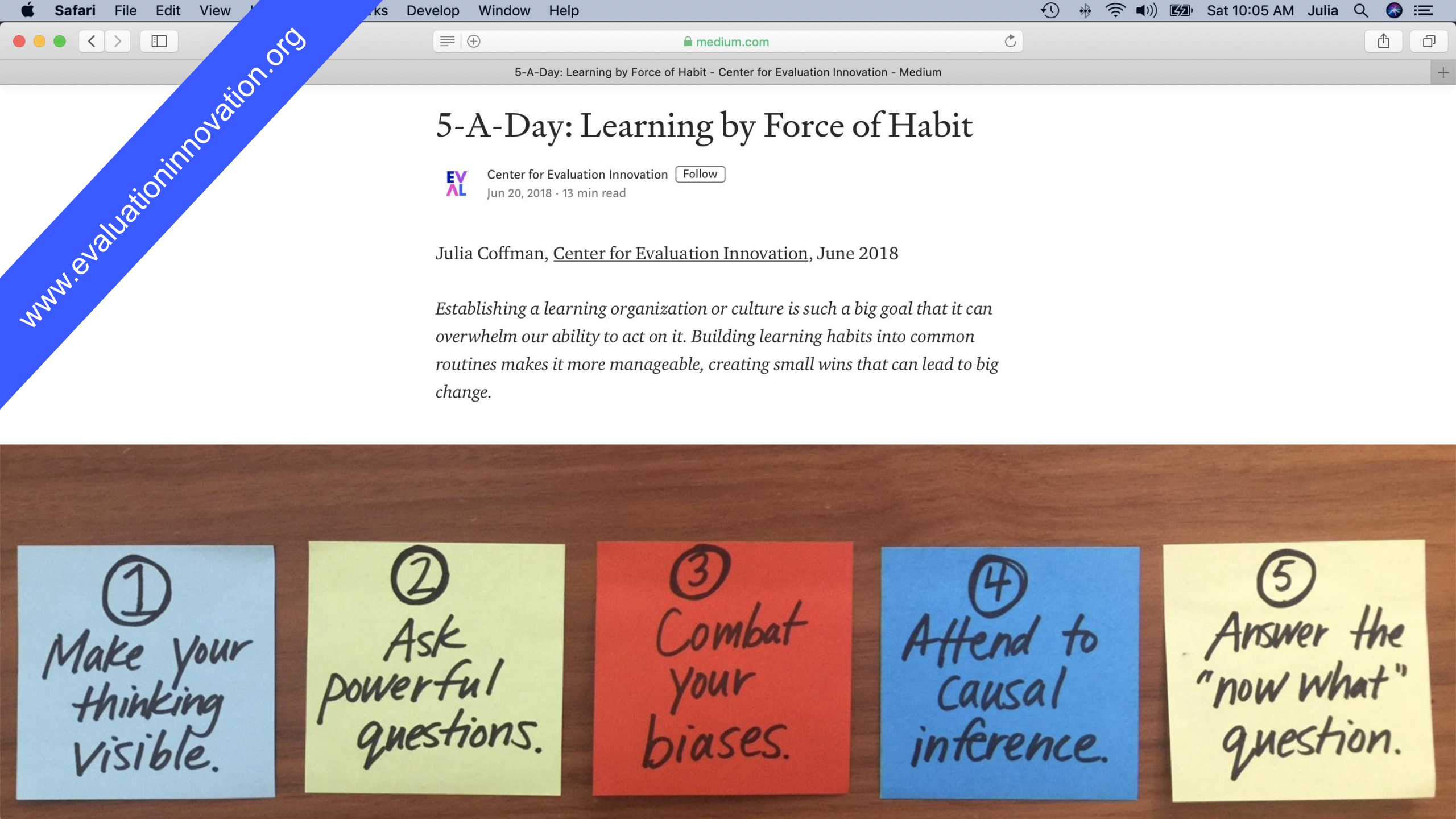
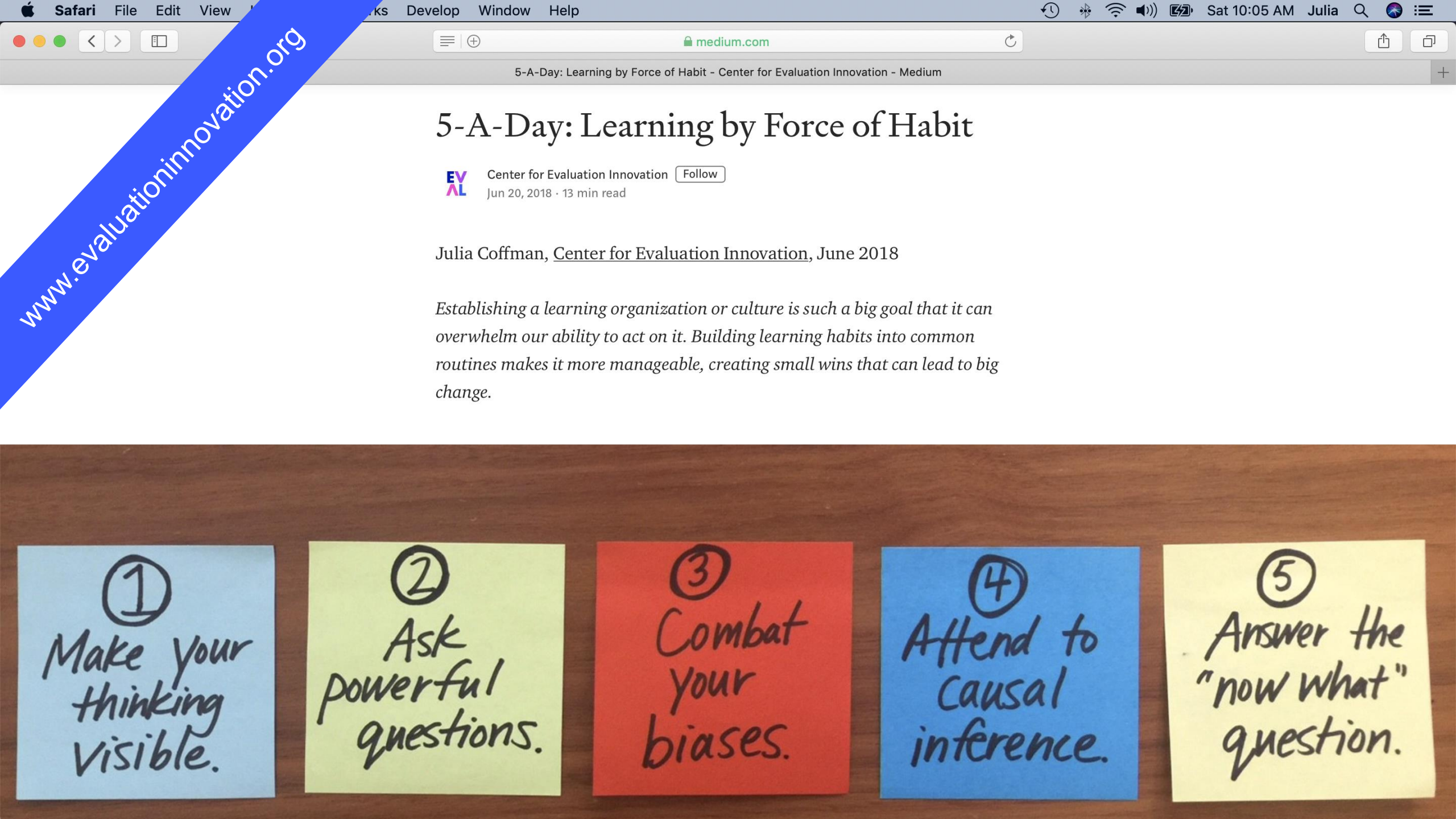
Making thinking visible

Asking powerful questions

Combating your biases

Attending to causal inference

Answering the “now what” question.



5-A-Day: Learning by Force of Habit



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Julia Coffman, [Center for Evaluation Innovation](#), June 2018

Establishing a learning organization or culture is such a big goal that it can overwhelm our ability to act on it. Building learning habits into common routines makes it more manageable, creating small wins that can lead to big change.

①

Make your
thinking
visible.

②

Ask
powerful
questions.

③

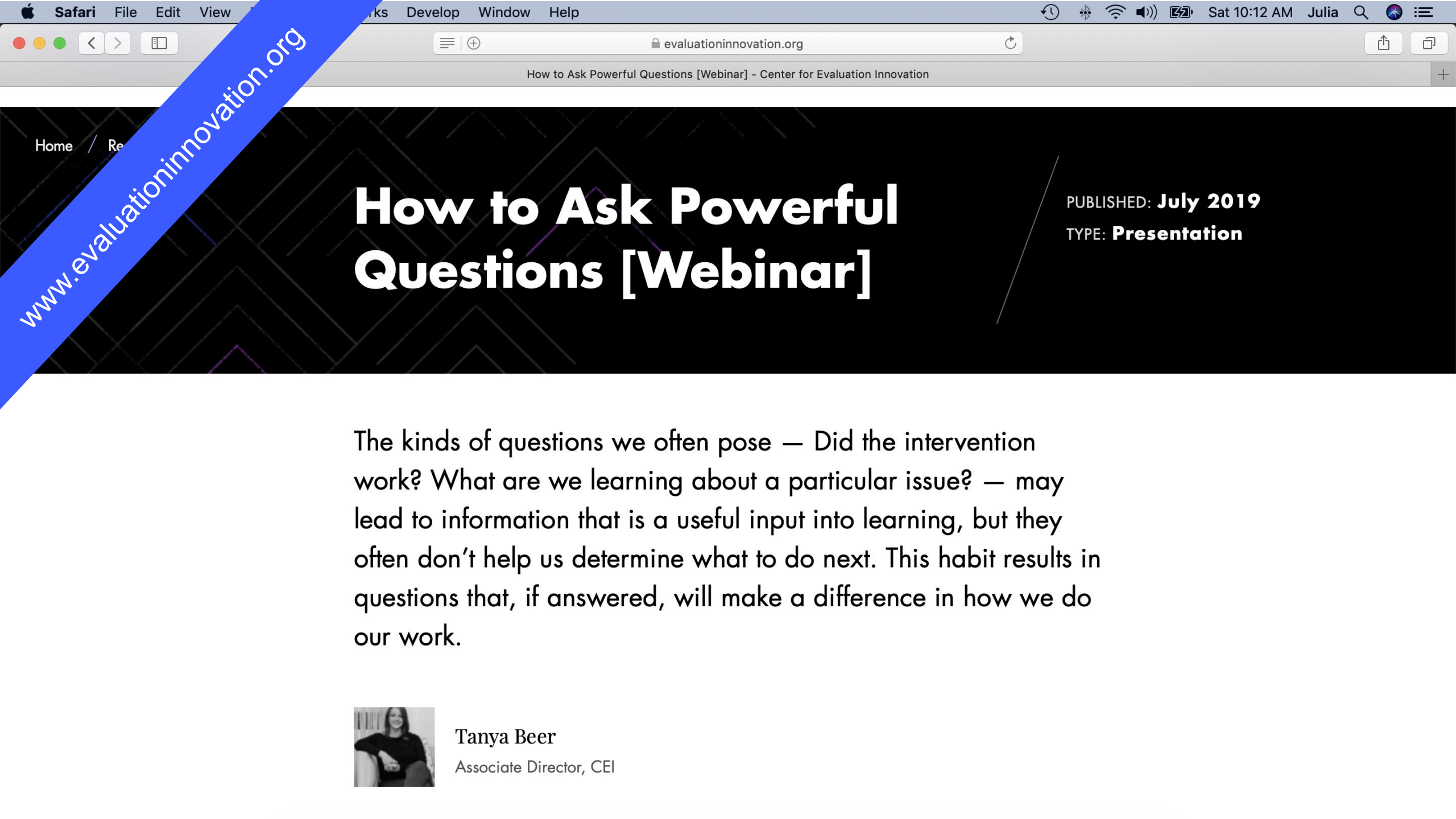
Combat
your
biases.

④

Attend to
causal
inference.

⑤

Answer the
"now what"
question.



www.evaluationinnovation.org

How to Ask Powerful Questions [Webinar]

PUBLISHED: **July 2019**

TYPE: **Presentation**

The kinds of questions we often pose — Did the intervention work? What are we learning about a particular issue? — may lead to information that is a useful input into learning, but they often don't help us determine what to do next. This habit results in questions that, if answered, will make a difference in how we do our work.



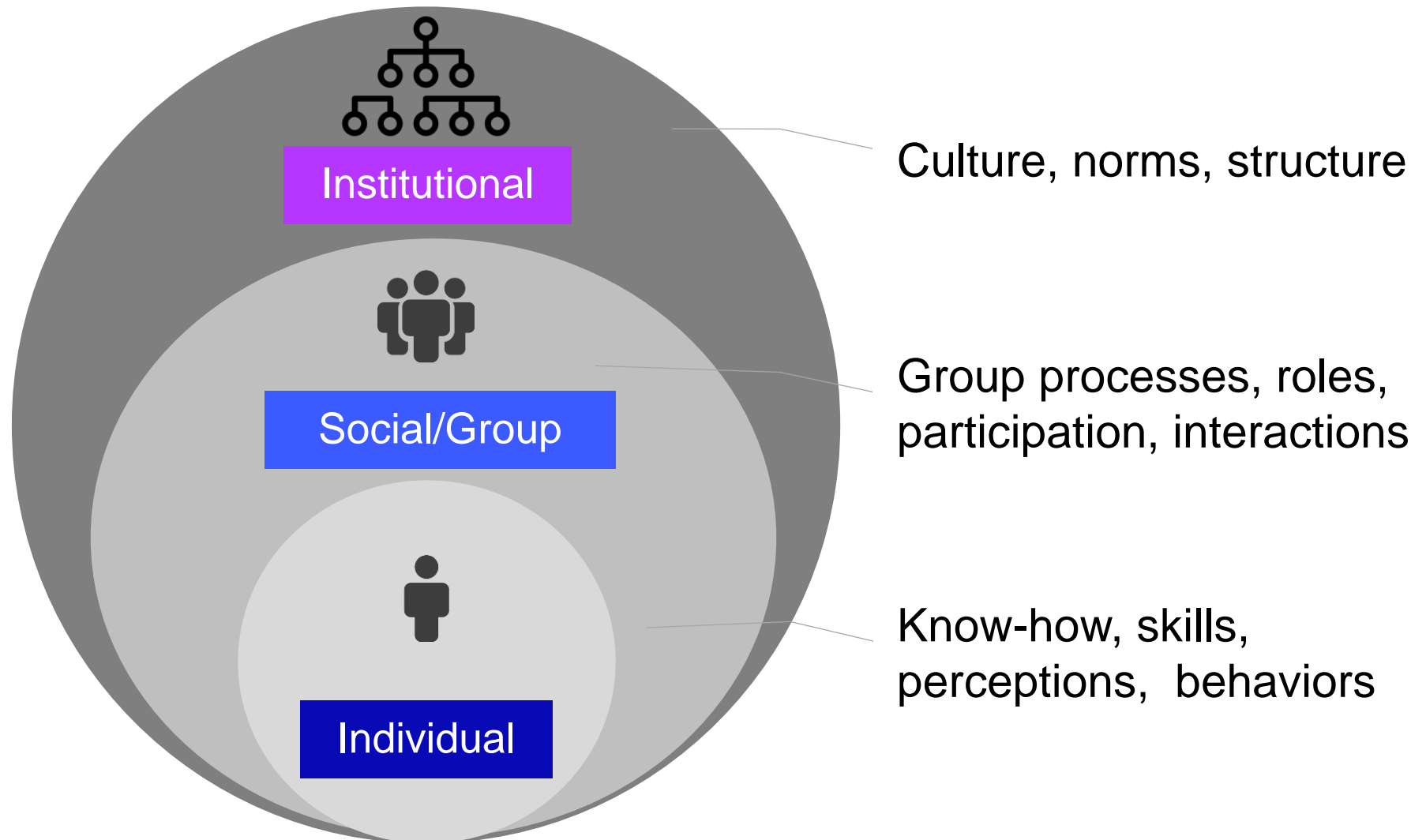
Tanya Beer

Associate Director, CEI

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Different types of factors affect our ability to develop and practice learning habits.



1. INDIVIDUAL: Personal motivation

Social stressors trigger a "threat response" that impedes learning habits:

- ✓ Insecurity about **status**
- ✓ Anxiety about **uncertainty**
- ✓ Fear of losing **autonomy**
- ✓ Not feeling part of a **social group**
- ✓ Doubt that decisions are **fair**

Identify and address how individuals' threat responses are driving willingness to engage with data and learning.



2. INDIVIDUAL: Role identity

Our choices are impacted by our perception of our roles. We behave in ways that fit with our identity's stereotypes.

- Expert?
- Advocate?
- Strategist?
- Coordinator?
- Facilitator?

- Identify the "scripts" people are operating on—how they understand what it means to be good at their role.
- Help people to see that learning habits are part of their role identity.
- Reinforce that message.





Individual

Assessment

Role identity for program staff was to be an expert, leading to cultural norms around being “perfect” and staff feeling they needed to always have the answer.

Opportunity

New strategic approach in which staff were asked to be generalists and engage differently with communities.

Approach

Flipped the role script from “You need to find the right answer”...TO....”You are a critical thinker who gathers evidence, assesses it, makes a compelling case, and then puts that strategy into action in a way that we can learn and iterate to make it better.”

3. SOCIAL: Relationships and connections

How individuals relate on teams, across teams, and with partners can affect learning habits both positively and negatively.

- Comfort with tough discussions and revealing fears?
- Too polite and deferential to challenge each other?
- Distrusting of one another's motives?
- Too disconnected to even hear different perspectives?

Observe who has relationships with whom and their explicit or implicit rules of engagement.

Create opportunities to help people understand one another's intentions and competencies, or to create new types of linkages.



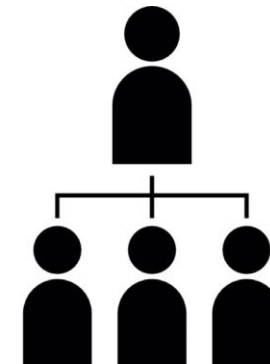
4. SOCIAL: Power dynamics and norms

Motivation and ability to learn is affected by formal control/ informal influence of:

- What the agenda is
- What options are on the table
- What data has value or is valid
- How information is interpreted
- Who blocks/enables information flow

Understand how power works formally and informally—who has it and how they use it.

- Reveal how power is shaping conclusions
- Recruit influential champions
- Bring in different perspectives.





Social

Assessment

Culture prioritized the preservation of relationships and avoidance of conflict. Teams showed deference to expertise, asking few hard questions of each other.

Opportunity

Need for revisions to strategy templates. Strong support and partnerships with leaders.

Approach

Developed new strategy templates with more powerful questions, evidence assessment, conversational practices.

Created learning champions at all levels of the organization.

5. INSTITUTIONAL: Rewards and incentives

Learning habits need to be reinforced.

Formal and material rewards:

- Performance reviews
- Promotions
- Grantmaking resources

Informal and psychological rewards:

- Engagement and praise
- Scrutiny and criticism

Examine how learning versus “non-learning” habits are rewarded.

Look for day-to-day opportunities to reinforce learning behaviors. Even basic recognition goes a long way.



6. INSTITUTIONAL: Workspace

Opportunities for interaction—physical and virtual—are key to learning.

- Who encounters whom?
- How and where do people connect?
- What mood do they experience when they do?

- Observe how physical and virtual space affects how and when people interact.
- Identify how to create more opportunities for people to “collide” in ways that can foster innovation or facilitate smaller group learning.





Institutional

Assessment

Had conflicting narratives. Said it was a learning organization, but didn't require the rigorous use of evidence or learning, making them vulnerable to confirmation bias.

Opportunity

Decisions about how to allocate evaluation resources.

New building.

Approach

Did not invest evaluation resources until thinking and assumptions were more visible.

Open and more collaborative space, accompanied by re-norming.

These are six (of many) variables that affect our ability to develop and practice learning habits.

1. Personal motivation

2. Role identity

3. Relationships and connections

4. Power dynamics and norms

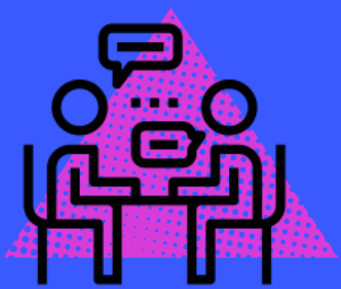
5. Rewards and incentives

6. Workspace

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graph LR; A[1. Personal motivation] --- B[2. Role identity]; B --- C[3. Relationships and connections]; C --- D[4. Power dynamics and norms]; D --- E[5. Rewards and incentives]; E --- F[6. Workspace]; B --- G[Learning habits]; C --- G; D --- G; E --- G; F --- G
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Learning habits

GROUP WORK



35 Minutes

1. First 5 minutes: On the stickies, write a brief description of what this factor looks like at your organization or in your work.
2. Next 20 minutes: Share your stickies and discuss how different 'expressions' of the factor might impede and/or support learning habits.
3. Final 10 minutes: Speed-generate intervention ideas to address your factor in ways that support learning.

Be ready to share 2 ideas your group discussed.

WRAP UP

Being strategic about supporting learning requires:

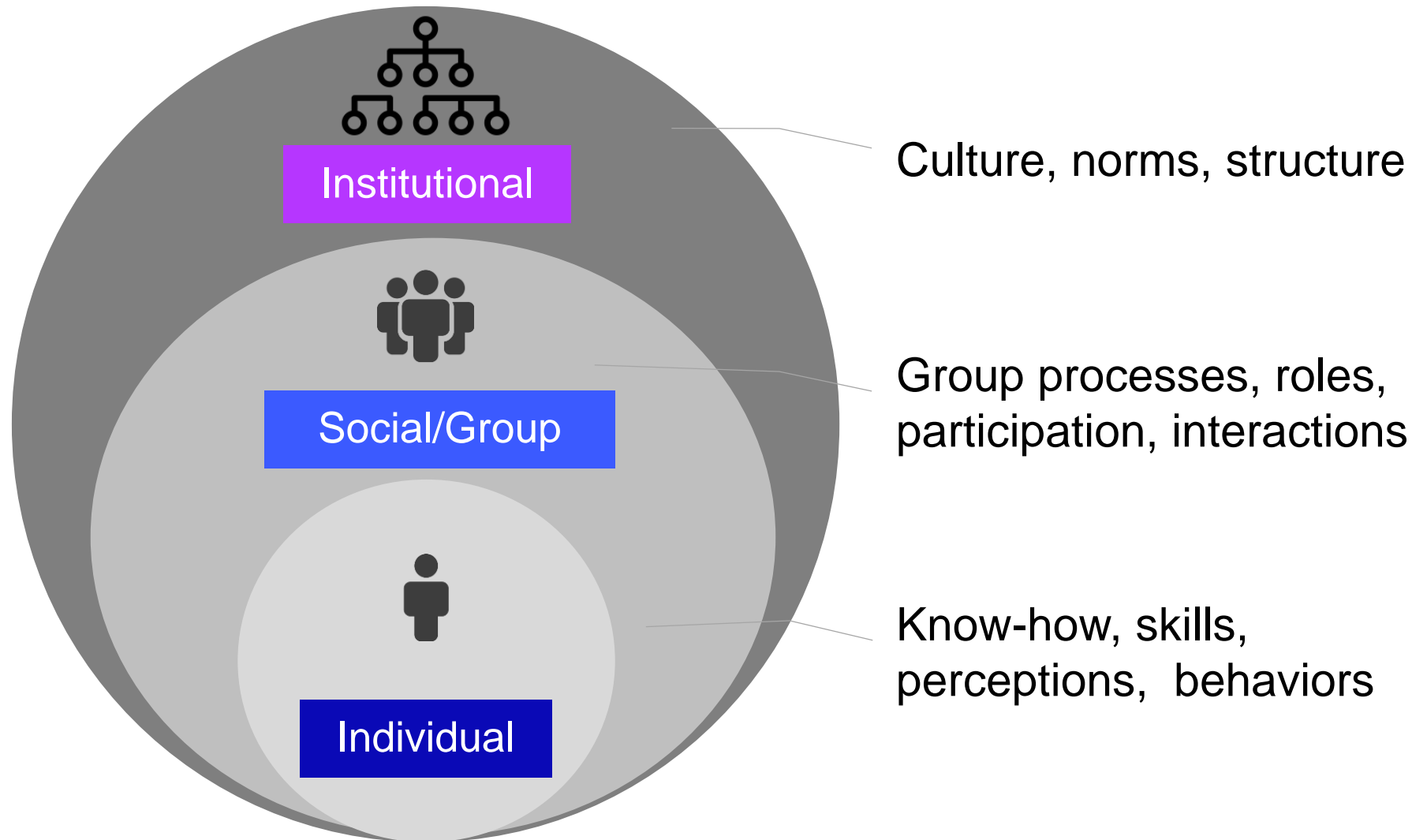
1. Clarifying the results you want—What are you aiming for with your learning work?
2. Diagnosing the systemic factors that are getting in the way of learning or helping to support it.
3. Getting tactical about what you can do to address the roadblocks and support the facilitating factors.

“I’m trying to transfer the power for learning to others. Sometimes I do this using structure, sometimes process, and sometimes without people even knowing it’s happening.”

--Ted Chen, Margaret A. Cargill Philanthropies



You have different possible points of intervention.



And different types of tactics or levers.



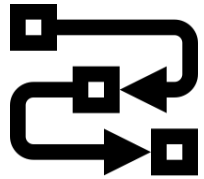
Tools

- Learning agendas
- Grants databases



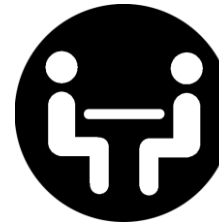
Infrastructure

- Technology
- Physical space



Processes

- Re-engineering
- Events



Training/Coaching

- Facilitation/meetings
- Data collection



Resourcing

- Embedded staff
- Consultants

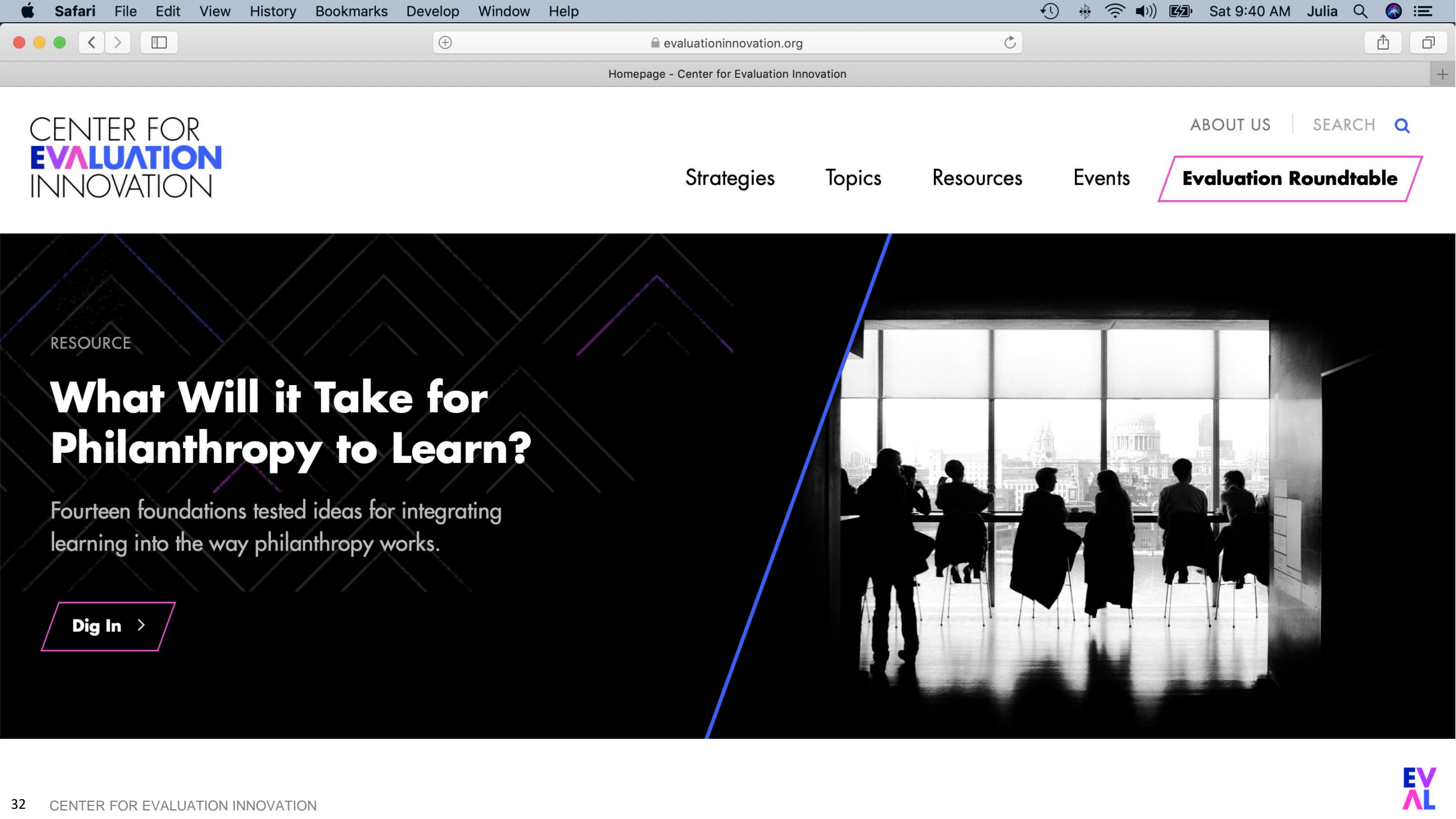


Rewards

- Recognition
- Financial incentives

As influential supporters of learning, we challenge you to:

1. **Pick a priority**—e.g., a team or group whose learning you want to support.
2. **Assess current practice** on how well they are currently practicing learning habits.
3. **Examine what is getting in the way** or encouraging their learning.
4. **Experiment with tactics** to either disrupt or further support those factors. Evaluate whether it is working!



RESOURCE

What Will it Take for Philanthropy to Learn?

Fourteen foundations tested ideas for integrating learning into the way philanthropy works.

Dig In >



Building Capacity to Learn, Part 2: How to Cultivate Strong Learning Relationships

Andrew Taylor & Ben Liadsky



Why we're here

Project with the [Ontario Nonprofit Network](#) in 2015.

Evaluation not working as well as it should be.

Need to focus on the *why* before the *how to*.

Relationships are key.



Sharing perspectives = Better evaluation.



Agenda

1. What is a learning relationship and why is it important?
2. Case study
3. Simulation activity
4. Debrief & Takeaways

Learning relationships require:

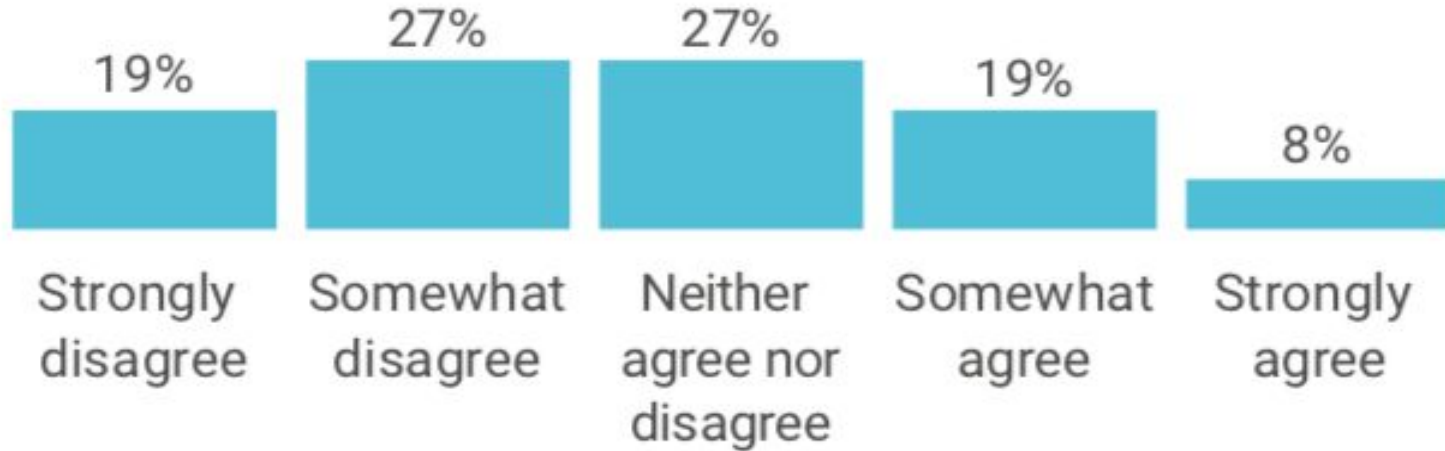
1. Interaction
2. Intentionality
3. Different skill sets



The power dynamics between funders and nonprofits



There is too much external pressure on our organization to measure and evaluate



Lasby, D. (2018) THE STATE OF EVALUATION: MEASUREMENT AND EVALUATION PRACTICES IN ONTARIO'S NONPROFIT SECTOR. Ontario Nonprofit Network.



40%

**of nonprofits surveyed
believed their processes
were effective for
encouraging learning
(2011).**



52%

**of grantmakers surveyed
believed their culture was
maximizing effectiveness
(2017).**



How will you evaluate this program? Because we have little funding for a formal process with an external evaluator, we will have Edward, our social work practicum student, design a self-report survey. At the beginning and end of the program, we'll administer the survey. We'll put in lots of numbers and percentages to make it look impressive. This is not very rigorous or valid, due to selection bias, self-report bias, confounding variables, and a host of other issues, but it should be enough to convince you that we have good evaluation data. Please send money so we can buy Edward a cake.

~Vu Le



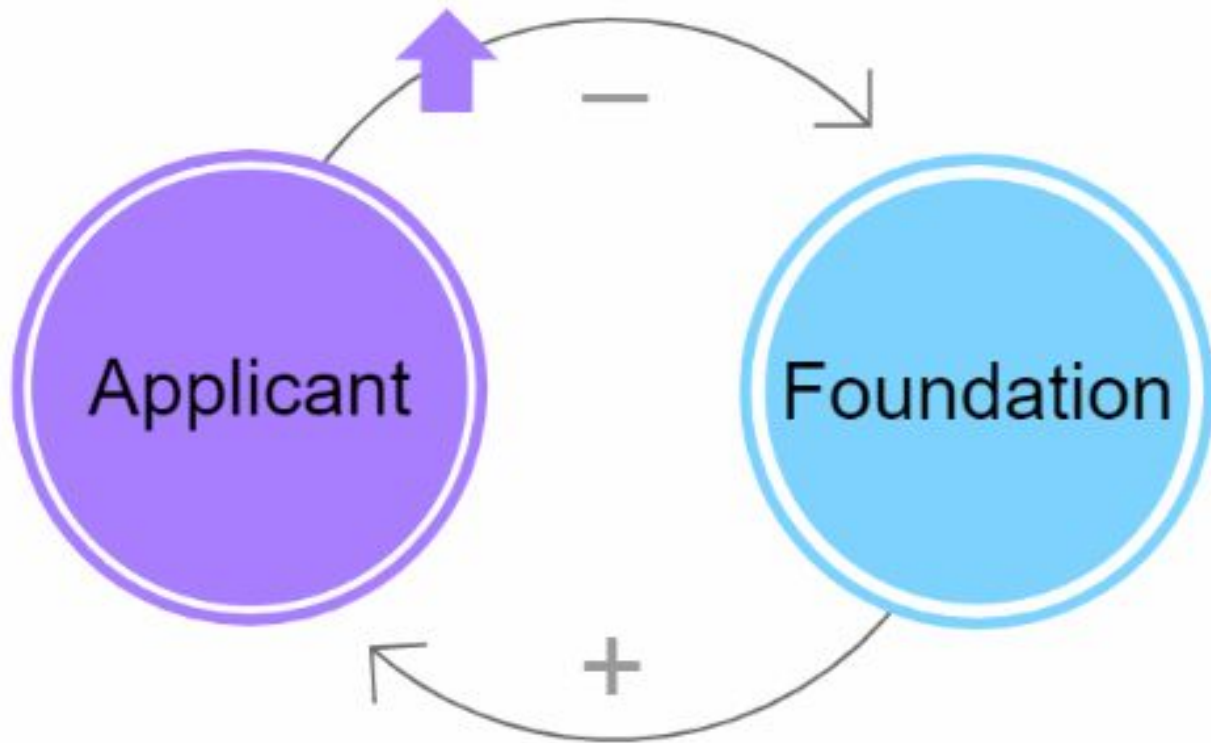
You know what you know based on the information people are willing to give you. I need a lot of information about something to feel informed. We get information from organizations and that is what we have to go on. I don't believe you can know what you need to know on paper. We do site visits and other things to help with this. I still don't feel like we know enough about these organizations. Even if you asked five people within our own organization about what they know about a grant recipient, you might get five different answers.

~Grantmaker

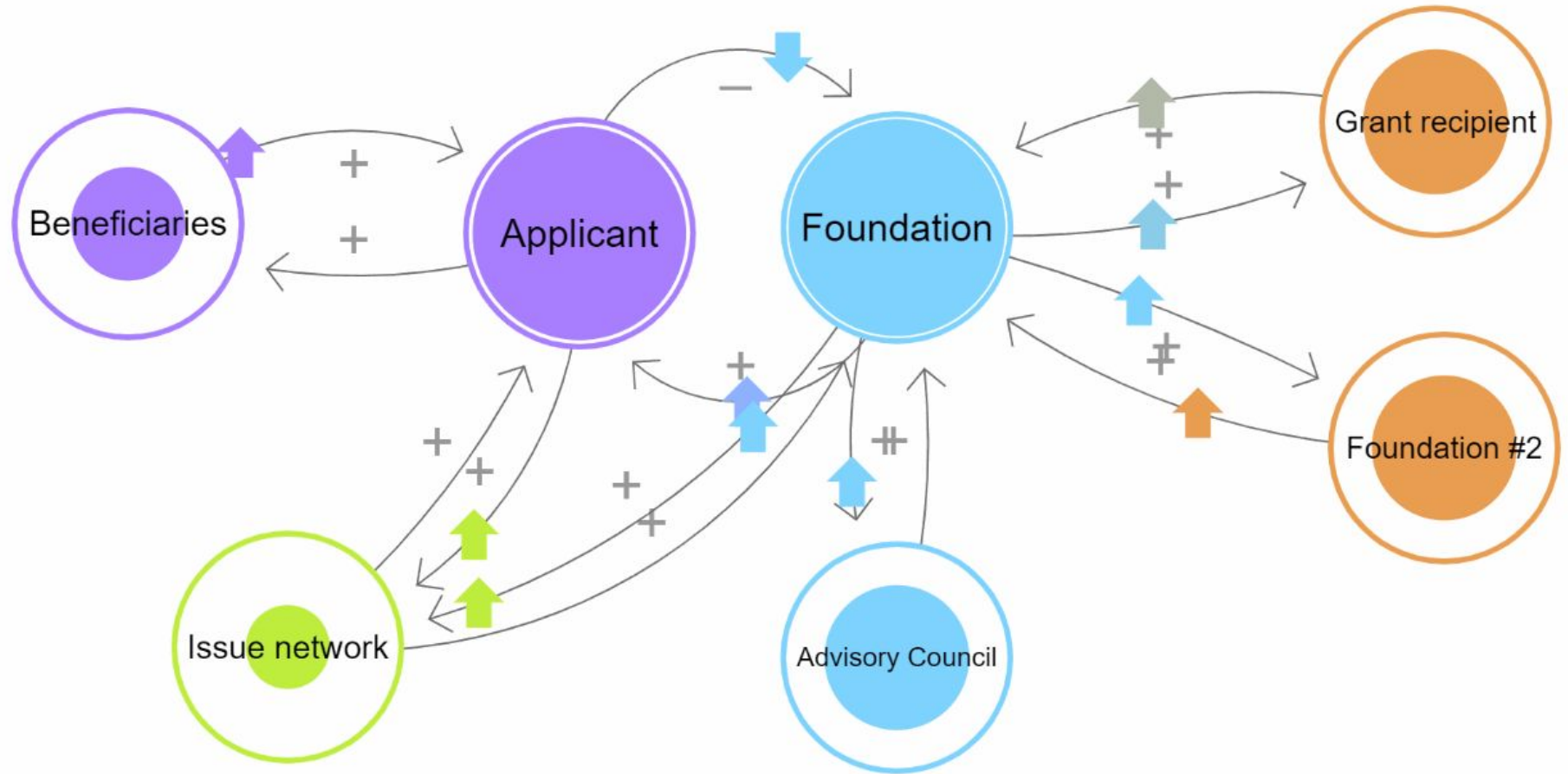
Learning happens in interaction

Organizations with strong learning cultures reach outside their own walls to listen and learn from partners.





Learning happens in INTERACTION



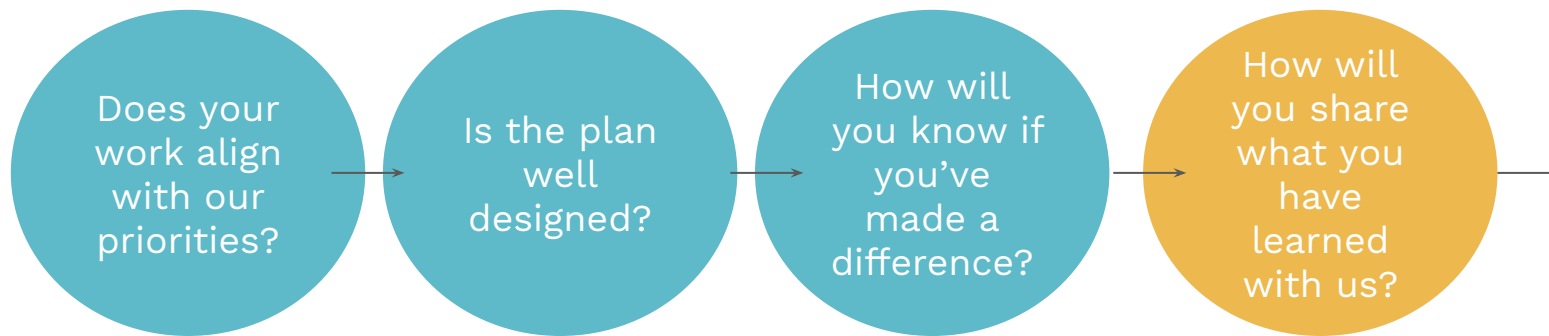
Learning relationships require intentionality

Setting up a relationship with another organization that is focused on learning can involve changing the content, format, and timing of your communication.

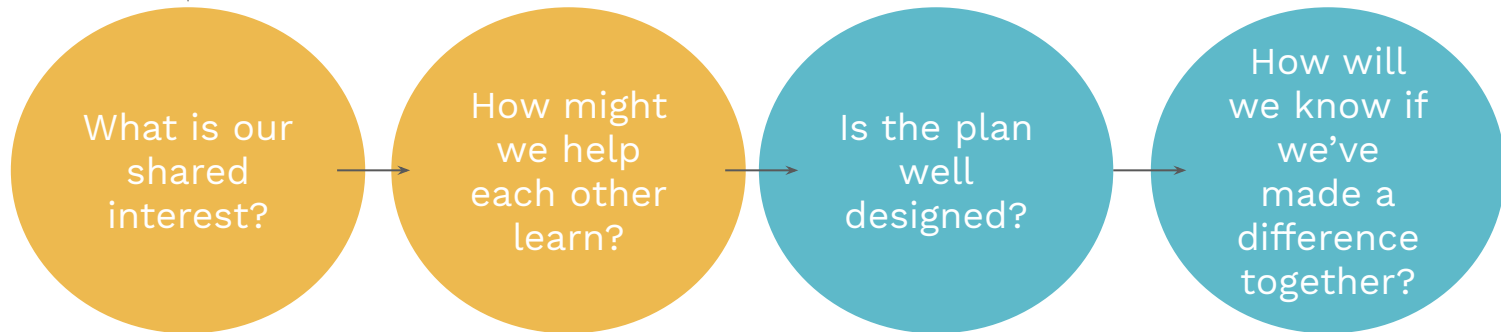


A learning focus requires rethinking how you work, **move learning to the beginning of the conversation**

Alignment & measurement conversation



Learning conversation



Challenges: Why this work isn't easy

Flexibility & accessibility vs. transparency & fairness.

Complex, rapidly changing environments — a layer removed from the changes happening on the ground.

Being responsive without being overbearing.

What are the skills you need?

Building a culture of learning takes time and skill. It may require different skills than building evaluation capacity.



Facilitation and listening skills



Sharing and learning from failure



Combining information of various kinds in order to identify new insights



Building a culture of learning also requires time and resources

II. Case study



Intro to case study

Two organizations to consider.

Our focus is on the **beginning** of the relationship. The beginning of the relationship can set the tone for how you interact/share with one another down the road.

Our intent is to think about ways that **different organizational learning cultures can influence how we work with and support one another.**

Awesome Organization

Hates meetings. Prefers short one-on-one “check-ins” on an ad hoc basis.

Staff regularly bump into each other as well as clients all day long.

Identity is built around a specific set of values (e.g., walking with our clients).

Loose, flexible approach to programming.

Stable & charismatic team of leaders.



Super Duper Organization

Meets regularly & uses meeting time really well.

Staff work in several different offices. Rarely meet face-to-face.

Identity is focused on a specific set of services.

More traditional hierarchy of roles, but is very clear & transparent about how it functions.

Recently went through a difficult, but positive leadership transition.



Discussion

Assuming the programs and theories of change being evaluated were the same, **how would you consider the differences in organizational culture if you were working with each organization?**

- What types of supports might you provide?
- What questions would you want to ask to learn more?

AWESOME ORGANIZATION	SUPER DUPER ORGANIZATION
Hates meetings. Prefers short one-on-one “check-ins” on an ad hoc basis	Meets regularly & uses meeting time really well
Staff regularly bump into each other as well as clients all day long	Staff work in several different offices. Rarely meet face-to-face
Identity is built around a specific set of values (e.g., walking with our clients)	Identity is focused on a specific set of services
Loose, flexible approach to programming	More traditional hierarchy of roles, but is very clear & transparent about how it functions
Stable & charismatic team of leaders	Recently went through a difficult, but positive leadership transition

Learning vs. measurement questions

LEARNING-ORIENTED QUESTIONS

Why are you proposing this project? What are some of your organization's learning goals?

Why do you see us as a good partner? How can we help each other learn?

What do you hope to learn? How will you make use of evidence when making decisions?

What do you expect to be the challenges? How will you know if you are on track? What would count as success?

How often do staff meet to talk or reflect on project/program progress? In what ways does your organization document and share information?

OUTCOMES & MEASUREMENT-ORIENTED QUESTIONS

What are your outcome objectives?

How do you align with our investment priorities?

What are your evaluation questions?

What are your benchmarks or targets?

What indicators and methods will you use?

III. Simulation activity



Starting a Conversation About Learning

ASK THESE QUESTIONS

How can we help each other learn?

Do you need help from others to accomplish your goals?
Why?

Where is our shared interest? Does it have to do with the outcomes we want to achieve? The populations we serve? The approaches we use? Our location?

What does accountability mean for each of us?

Scenario 1: The Funder Information Session

The Scene	An information session for potential grantees at which a funder has just presented a newly developed set of priority outcomes and reporting expectations
The Characters	<ul style="list-style-type: none">• A grant officer from a large, national foundation who has just made the presentation.• Applicant A: Experienced, with a long standing relationship to this funder, who thinks these new expectations are going to be a lot of work• Applicant B: Brand new and inexperienced. Knows very little about evaluation
The Problem	Applicants are feeling like funder expectations for evaluation are a bit unrealistic.
The Opening	Does anyone have any questions for the funder?

Our New Funding Model

- We are focusing on projects that make a measurable impact on youth transitioning successfully to work.
- All grantees will be using a standardized pre-post survey with 65 questions to be completed by all participants.
- Every six months grantees will report on how many youth got jobs.



The **Fantastic** Foundation

Scenario 2: The First Project Meeting

The Scene	A local funder and a new grantee are having their first meeting about evaluation plans for a new project focused on addressing homelessness
The Characters	<ul style="list-style-type: none">• A grant officer who is an experienced grantmaker, but new to homelessness issues• The leader of the grantee organization, an experienced and respected leader on homelessness with a history of being a thorn in the city's side• An evaluator hired by the funder to work with the grantee
The Problem	This is a high profile new grant for this funder, and it has high expectations for what it can show through the evaluation. The nonprofit isn't so sure these expectations can be met, and prefers to use very qualitative, participatory approaches
The Opening	What outcomes are we going to measure?

IV. Debrief & Takeaways



How Our Work Fits in with the Challenges Posed by Julia and Tanya

Pick a priority	Funders and grantees learning together
Assess current practice	Zooming in on how people interact and how organizational culture works
Examine what is getting in the way or encouraging learning.	Power differences. A strong focus on measurement. Waiting too long to start talking about learning. Misalignment of skill sets. Lack of intentionality.
Experiment with tactics to disrupt or support those factors.	Processes: meeting design Tools: self-assessment Training & Coaching

Key Takeaways

1. Learning happens in **interaction**. Go beyond your own team.
2. Learning requires **intentionality**. Keep learning as the focus and make it action-oriented.
3. Developing a learning relationship means developing **new skill sets**.



Achieving Greater Impact by Starting with Learning

How grantmakers can enable learning relationships at the grant application stage



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