Scenario: Making Way for Strategic Learning

Initiative Design:

A foundation ("the Foundation") with a multi-billion dollar endowment and international influence is evaluating the impact of its "Big Bet" investments to tackle income inequality in the United States. It has invested over $15 million in a consortium of nonprofit, for-profit, government, and academic institutions to design and implement three distinct approaches that address inequality within and across participating communities.

Evaluation Objectives:

In the RFP, the Foundation specified that it wanted to explore:
- Real-time lessons and learning to support course-correction on approaches used in the Initiative
- Impact evaluation to explore areas that include, as identified by the Foundation's Board and Leadership:
  - Impact of investments on promoting innovative and transformative practices on the ground
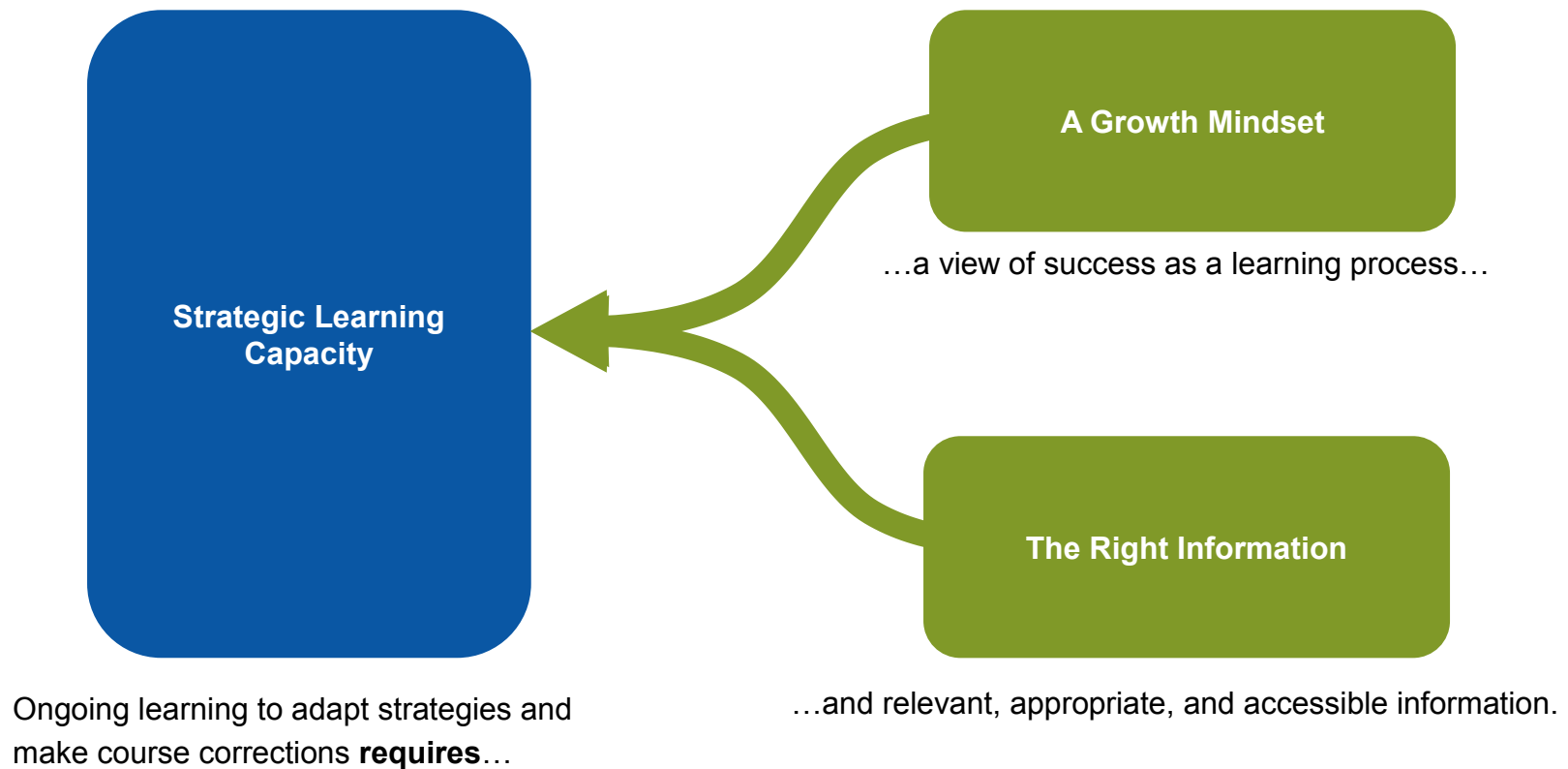 - Impact of investments on reducing income inequality within and between states

Key Players:

- **The Foundation's leadership and board:** Oversee the Initiative, are strongly invested in its success, and have interest in learning what is working to achieve and sustain long-term impact in the states where the Initiative is being implemented.

- **The Foundation's Evaluation Director:** Although the Foundation does not conduct its own evaluations, the Evaluation Director guides all evaluation activities and coordinates and communicates with external evaluators. S/he is responsible for submitting the final report to Foundation leadership and board.

- **Program staff at the Foundation:** Responsible for developing and implementing the grantmaking strategy for this Initiative as well as provide supports to further the work such as convenings, publications, and communications.

- **Initiative partners:** Agencies and groups involved in designing and implementing the evaluation. By design (from the Foundation) these partners' only pathway for input on the evaluation is through the Evaluation Director. They have no direct connection to the evaluation development or data collected or to the external evaluators (except when asked to complete interviews or focus groups). Partners are most interested in identifying ways to improve the processes, outputs, and immediate outcomes.

- **Community residents:** These individuals are impacted by the Initiative either through their direct participation, or indirectly from the Initiative's influence on local communities and states.

- **External evaluator:** The external evaluator is a firm with a history of examining small-scale community-based poverty alleviation and income maintenance programs and cross-sector collective impact initiatives in cities and counties, but has limited direct experience with Initiatives as large as this Foundation's.

Discussion Questions:

1. How does this project resonate with work you are doing?
2. In what ways is this project well-suited for a strategic learning framework?
3. In what ways can the Design, Objectives, and Key Players present challenges to strategic learning (e.g., influence on growth mindset and information)?

A Model for Understanding Strategic Learning Capacity

Strategic Learning Capacity

A Growth Mindset

…a view of success as a learning process…

The Right Information

Ongoing learning to adapt strategies and make course corrections **requires**…

…and relevant, appropriate, and accessible information.

INFORMING CHANGE