

Strategic Learning: Pacesetting Practices

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EPISCOPAL HEALTH
FOUNDATION



The Colorado Health Foundation™

embedded

learning

formative adaptive

developmental emergent

evaluation

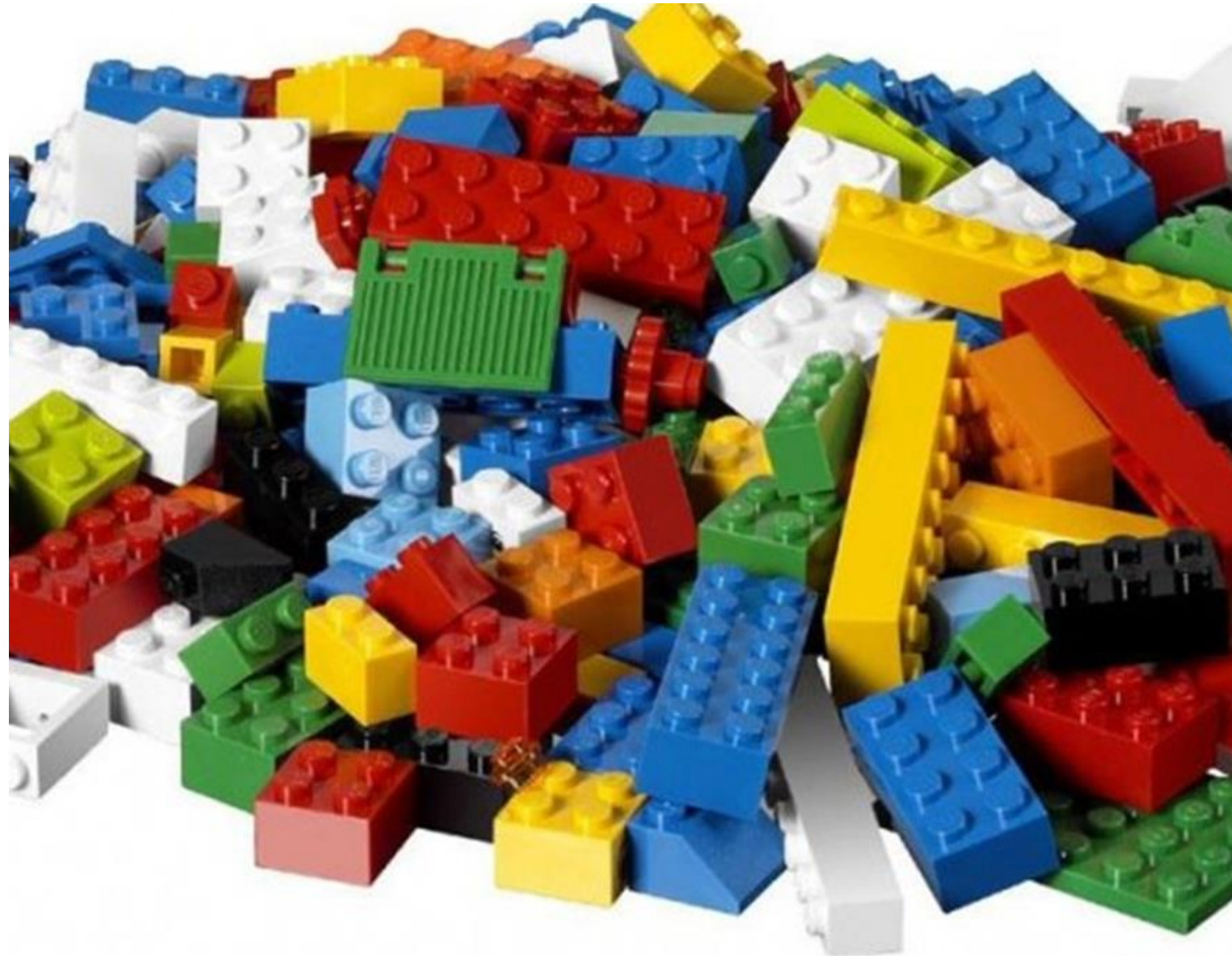
organizational

strategic

system

The Philanthropic Context for Evaluation

- Growing investments
 - ✓ Foundation Evaluation Benchmarking Study
- Rethinking the role of evaluation in philanthropy
 - ✓ FSG's Strategic Learning and Evaluation Framework



Strategy is generally understood to be about where an organization is headed and *how it intends to get there.*

Patton & Patrizi

New Directions for Evaluation

2010

Strategic learning



Using data and opportunities to learn and adapt strategies in response to changing environments or new information

Spark Policy Institute

What have pace-setting foundations learned about what works in evaluation and learning, particularly strategic learning?



Learning & Evaluation Interview Participants



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Key Interview Findings

#1. Increasingly, philanthropy is resourcing learning, but foundations are still figuring out how to institutionalize learning effectively

Learning & Evaluation in Philanthropy Continued Evolution

40% of foundations with **evaluation units** are new or have changed names in the last two years.

Trends in Titles



Source: Benchmarking Evaluation in Foundations (CEI/CEP)
The Evaluation Roundtable, February 2016



Tackling Philanthropy's Overwhelm: Strategic Learning in the Flow

“Learning how to learn is more important for us,” as compared to learning how to evaluate.

David Fukuzawa, Managing Director of Health, the Kresge Foundation (2015 Interviews on Strategic Learning)

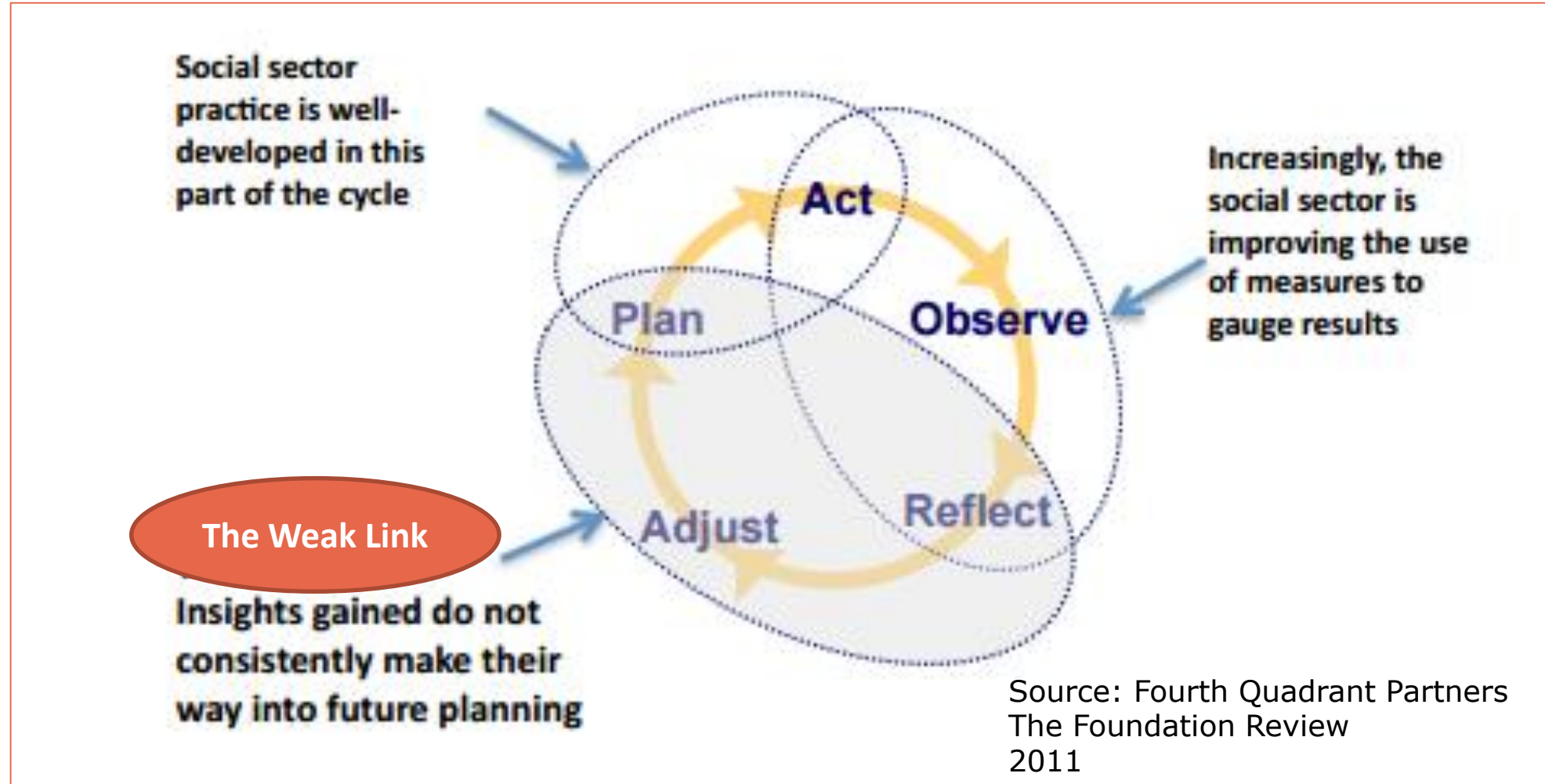


Harvard Business Review Photo (DeLong, 2015)

Key Interview Findings

#2. Pacesetting Foundations are investing specifically in learning practices (e.g. emergent learning)

Growing Investments in Learning Practices



GROWING INVESTMENTS IN LEARNING PRACTICES

Good Learning Questions
Cultural Fit **Embedded**
Just in Time



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Image Courtesy of artur84 at
FreeDigitalPhotos.net

Key Interview Findings

#3. Foundations seek deeper learning partnerships with partners and communities

Opportunities: Seeding & Growing Partner Voices



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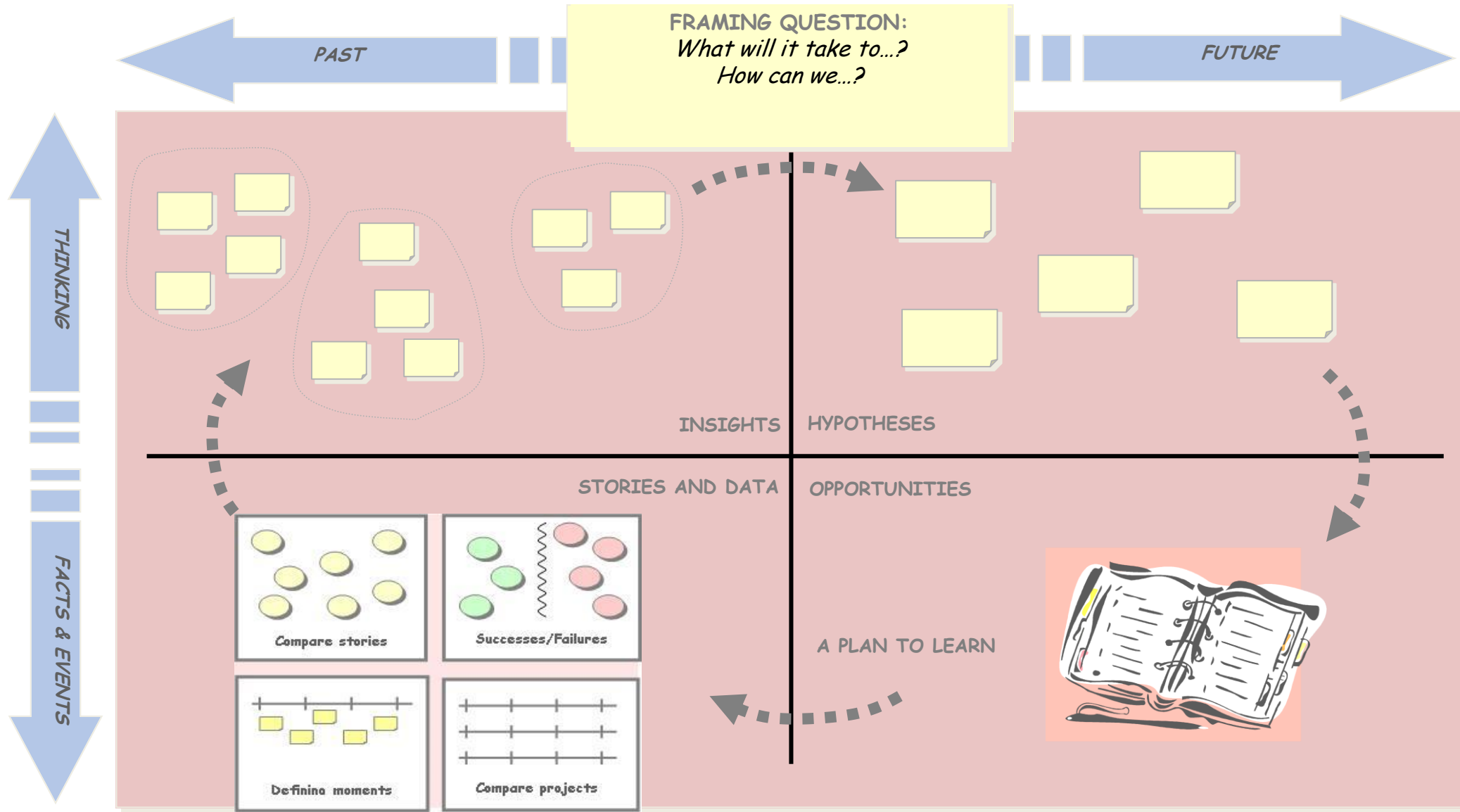
Learning at the Colorado Health Foundation

We believe....

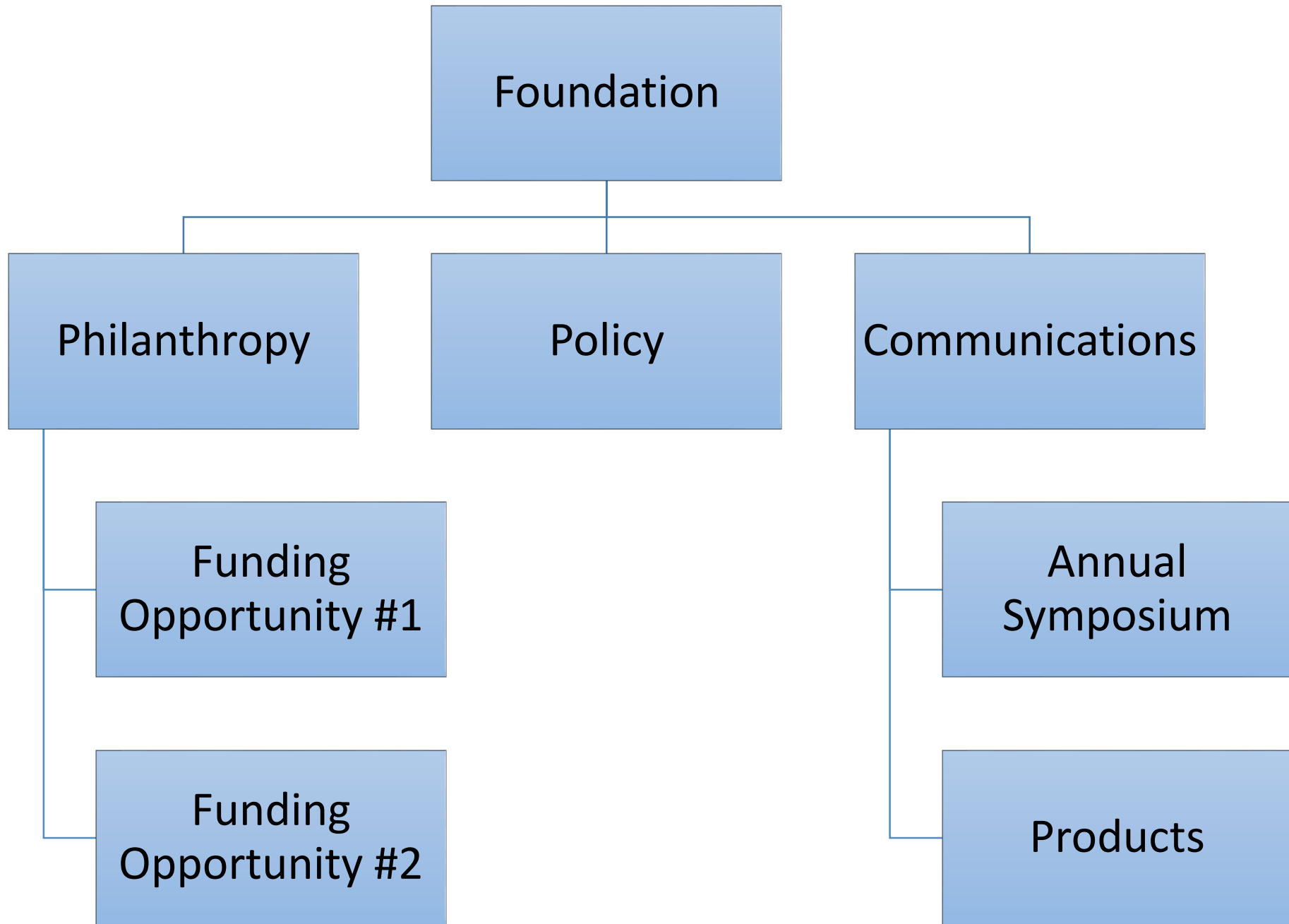
- ❖ Learning and evaluation are essential parts of strategy.
- ❖ Learning deliberately is at the core.
- ❖ Learning results in visible change.

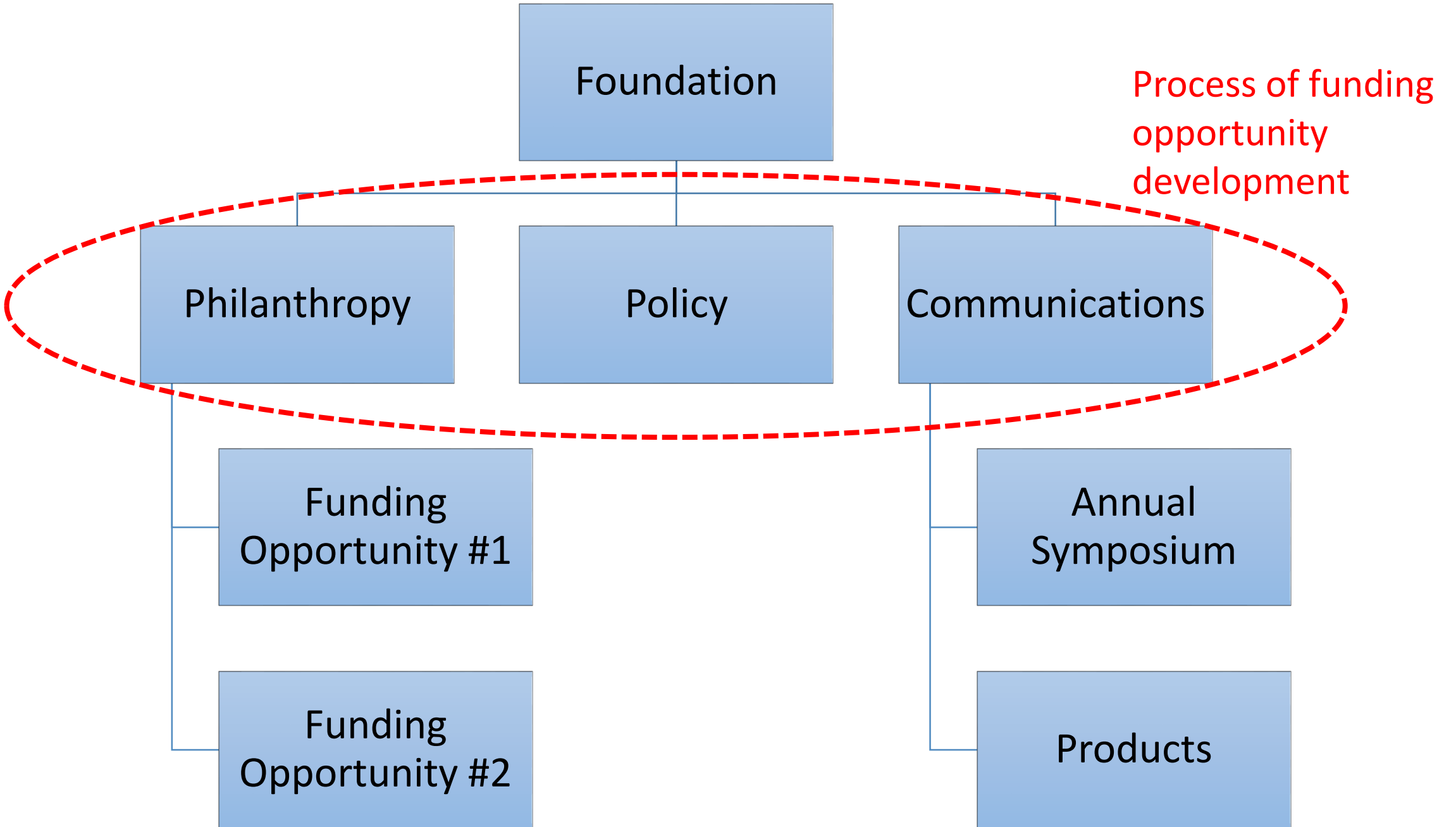
We really wanted to be a
learning organization...

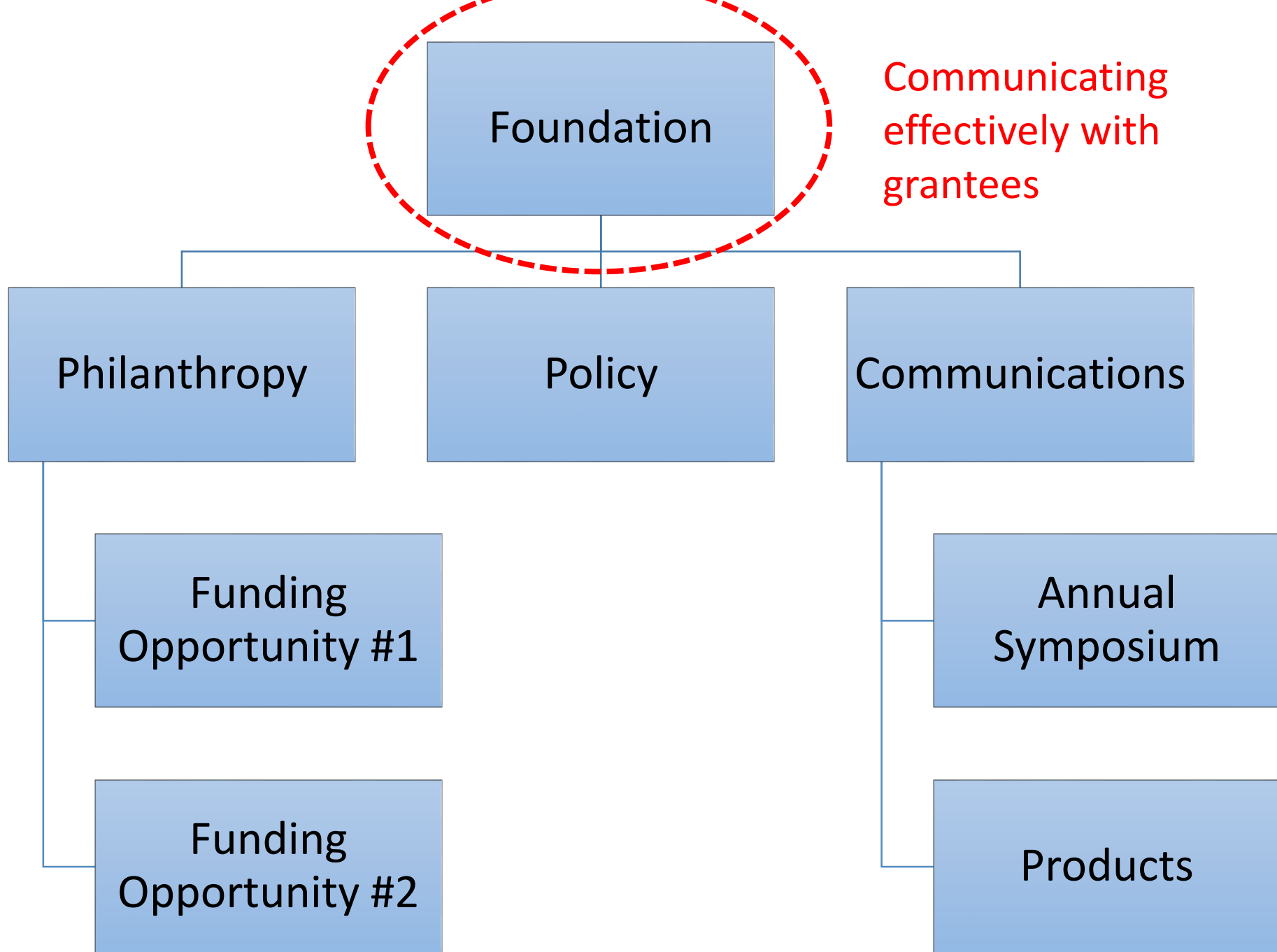
#1. Start small, where you are.



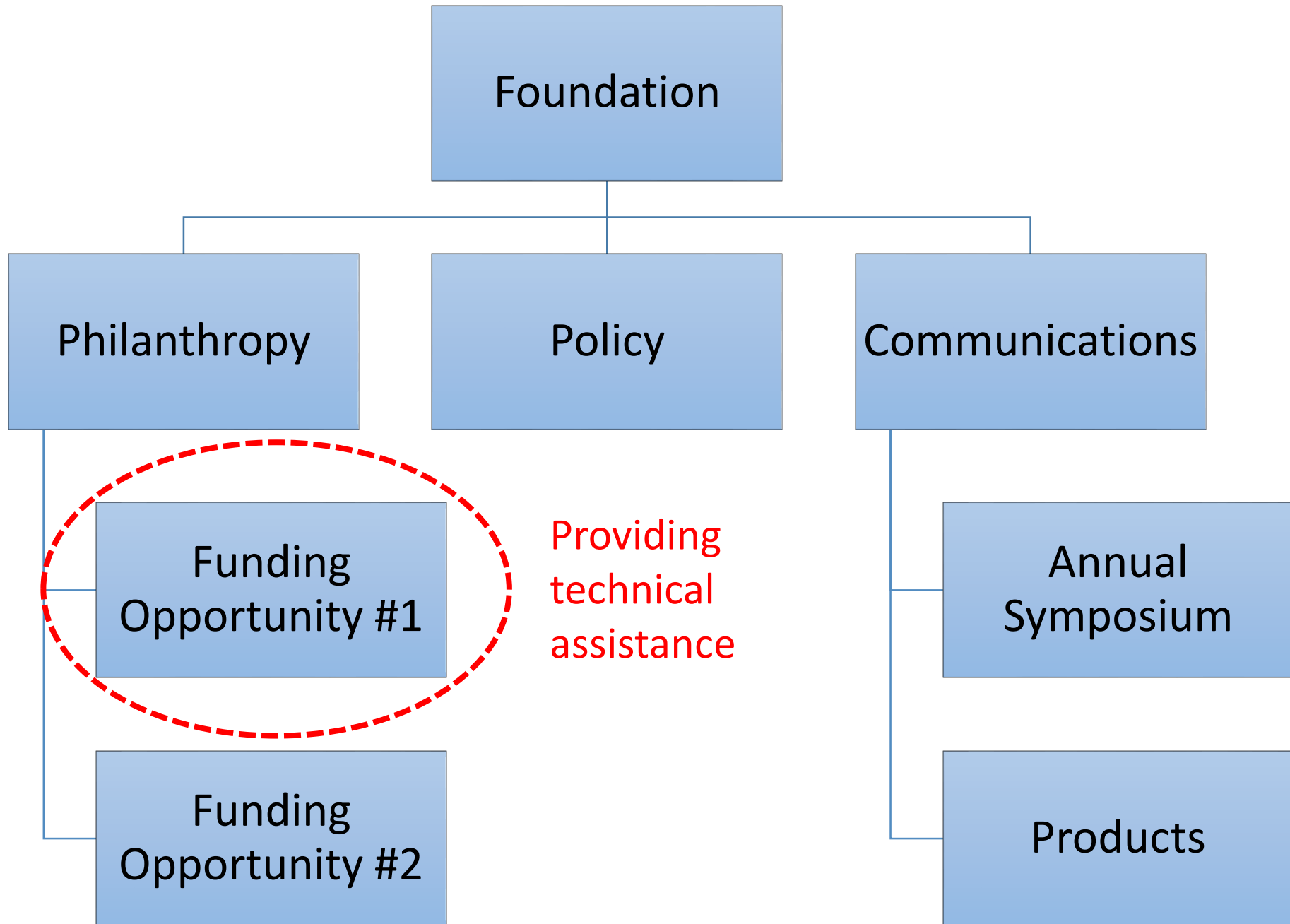
Go where the momentum is.

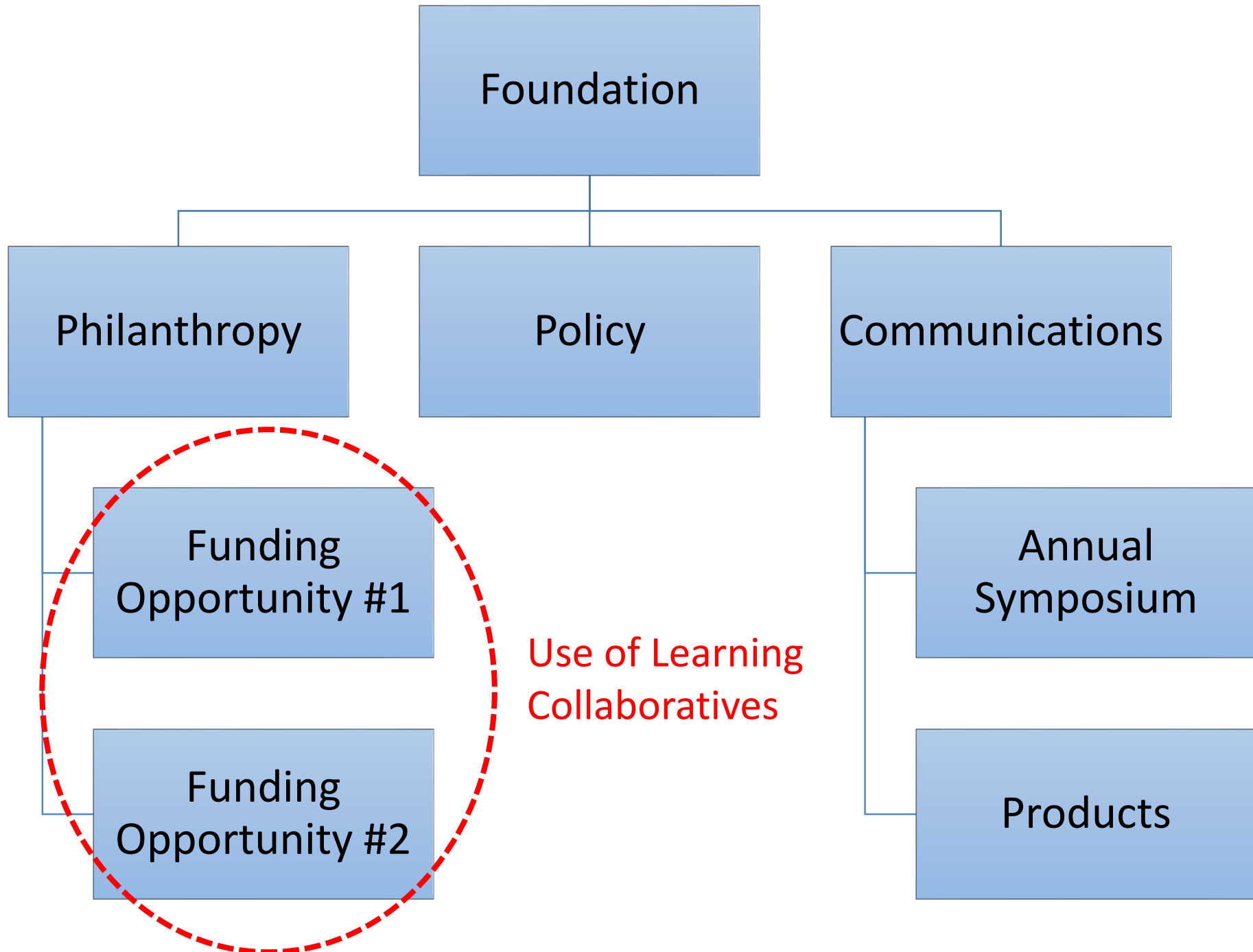


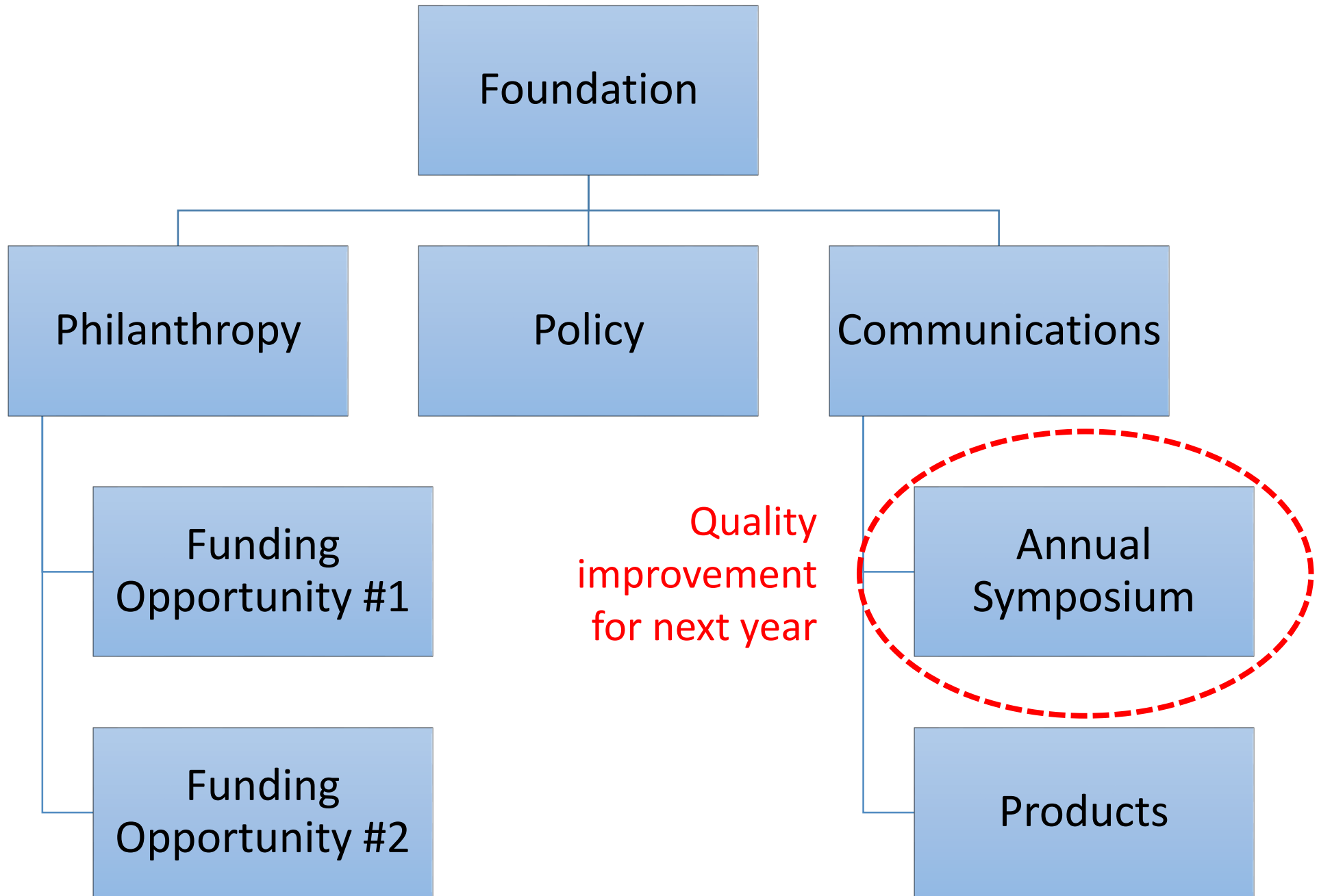


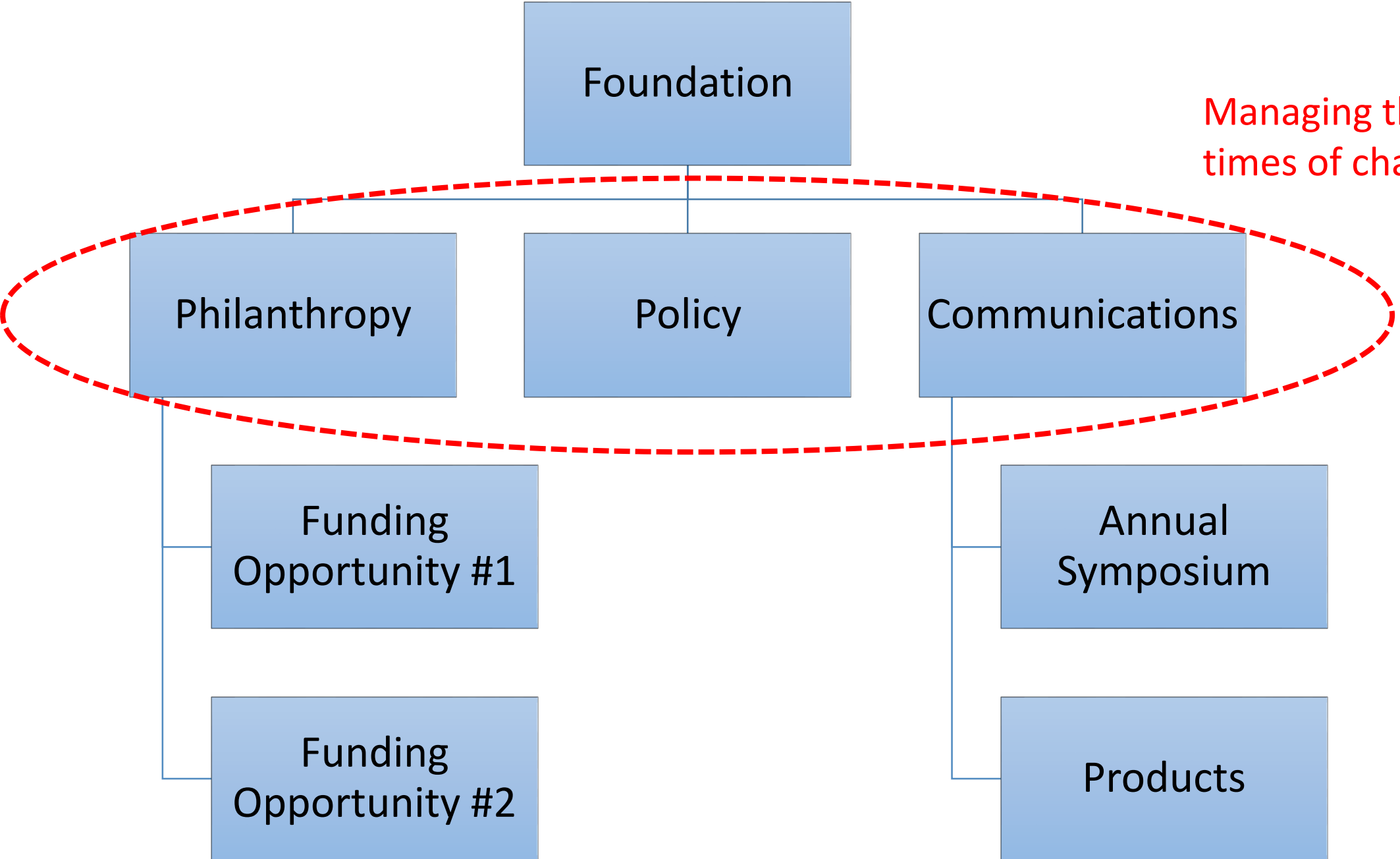


Communicating effectively with grantees









Managing through times of change

Be your own guinea pig.

#2. Learn deliberately.

Get clear.

Line learning up with decisions.

#3. Take learning up a level.

Learning in complexity.

Learning and knowledge
management across time.

Positioning learning at the
strategy level.

Highlighted Resources



Center for
Evaluation Innovation

<http://www.evaluationinnovation.org/>



<http://www.fsg.org/blog/benefits-aligning-strategy-evaluations-and-operations>



<http://www.4qpartners.com/>

Publications

[Learning through Grantmaking to Improve Impact \(2012\)](#)

[Eyes Wide Open: Learning as Strategy Under Conditions of Complexity and Uncertainty \(2013\)](#)



- More webinars on this topic?
- New topics you want to tackle or learn more about?
- Innovative work that you want to share?
- A question you want to pose to your colleagues?

Contact us at
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