

3-2019

## Building Principle-Based Strategic Learning: Insights From Practice

Kelci M. Price

*Colorado Health Foundation*

Chera Reid

*Kresge Foundation*

Suzanne Kennedy Leahy

*Episcopal Health Foundation*

Follow this and additional works at: <https://scholarworks.gvsu.edu/tfr>

Part of the [Nonprofit Administration and Management Commons](#), [Public Administration Commons](#), [Public Affairs Commons](#), and the [Public Policy Commons](#)

---

### Recommended Citation

Price, Kelci M.; Reid, Chera; and Leahy, Suzanne Kennedy () "Building Principle-Based Strategic Learning: Insights From Practice," *The Foundation Review*: Vol. 11: Iss. 1, Article 12.

<https://doi.org/10.9707/1944-5660.1457>

Available at: <https://scholarworks.gvsu.edu/tfr/vol11/iss1/12>

This Open Access is brought to you for free and open access by ScholarWorks@GVSU. It has been accepted for inclusion in The Foundation Review by an authorized editor of ScholarWorks@GVSU. For more information, please contact [scholarworks@gvsu.edu](mailto:scholarworks@gvsu.edu).

# Building Principle-Based Strategic Learning: Insights From Practice

Kelci M. Price, Ph.D., Colorado Health Foundation; Chera Reid, Ph.D., Kresge Foundation; and Suzanne Kennedy Leahy, Ph.D., Episcopal Health Foundation

**Keywords:** Strategic learning, foundation evaluation, evaluation, learning practice, strategic philanthropy

## Introduction

Strategic learning enables greater impact and improved outcomes in mission-driven organizations. At its core, strategic learning is simply the process of building evidence and reflection into the strategy process in meaningful ways, so that decisions can be improved (e.g., Coffman & Beer, 2011). In recent years, learning has emerged as central to conversations about the intersection of evaluation and strategy (Preskill, 2017). Yet, foundations have struggled to create practices and behaviors that effectively support organizational learning, including learning about strategy. With a growing cadre of foundation staff with responsibilities that cut across strategy, evaluation, and learning, the topic of strategic learning is ripe for strengthening.

Many foundations have positioned themselves as engaging in strategic philanthropy, in which the foundation has specific conditions in the world it is seeking to change and so takes intentional actions to help these changes occur (Bolduc, Buteau, Laughlin, Ragin, & Ross, 2007). Given this intent, foundation staff need effective ways of testing and adapting their strategies. Strategic learning is a key mechanism through which foundations can strengthen the ability to adapt as they seek social change. Patrizi, Heid Thompson, Coffman, & Beer pointed out that for complex environments and complex problems, “learning is strategy” (2013, p. 50). Strategic learning supports deeper inquiry into the thinking that guides a foundation’s strategies, identifies what evidence needs to be gathered about the results those strategies are generating, allows the foundation to make sense of that evidence, and supports application of that new knowledge to decisions about strategy

## Key Points

- Strategic learning is a powerful tool for foundations to achieve greater impact, yet foundations have struggled to create practices and behaviors that effectively support them in learning about strategy. Given that many foundations are engaged in strategic philanthropy, where they have specific conditions in the world they are trying to change, it is critical that they have the capacity to effectively learn about and improve their strategies.
- This article offers three principles for strategic learning, informed by the field of strategic learning and insights from practice across three foundations. Each principle is explored in terms of what it means and why it is important, along with examples from how it could look in practice.
- By taking a principle-focused approach to strategic learning, this article offers a base from which to build a rigorous practice of strategic learning in any organization and to tailor the specifics of that practice to the organization’s unique context and culture.

in a way that improves impact. Despite the central role strategic learning plays in increasing a foundation’s likelihood of success, many of them struggle to develop a strong practice that advances their mission.

## Three Principles for Strategic Learning Practice

Reflecting on practice, we sought to write an article that would have accelerated our own early

*While organizational context and culture must be considered, we have found that certain principles hold across our respective practices. By grounding in principles, we seek to illuminate approaches that can be applied across contexts to advance strategic learning practice.*

efforts. Each of us has had numerous conversations with peers to compare notes on how to build a strategic learning practice in our organizations. While organizational context and culture must be considered, we have found that certain principles hold across our respective practices. By grounding in principles, we seek to illuminate approaches that can be applied across contexts to advance strategic learning practice. This discussion offers three principles for strategic learning that support greater impact and improved outcomes, each informed by insights from practice.<sup>1</sup> For each principle, we describe what it means and why it is important, and provide examples of how we have taken action. The article has two primary audiences: philanthropic and nonprofit staff who are building a new strategic learning practice, and those who may have an existing practice of evaluation or learning and want to position it more strongly within the realm of strategic learning. The principles offered here are intentionally not exhaustive, as they are offered as a starting point from which practitioners can build within their particular contexts. For additional considerations, we suggest reviewing related literature (e.g., Patrizi, 2010).

## **Principle No. 1: Position Learning and Evaluation in Service of Strategy**

This first principle recognizes the intersection of strategy, learning, and evaluation, and the importance of ensuring that a foundation's practices around learning and evaluation (L&E) are strongly aligned with its strategic work. A significant barrier to quality strategic learning is the lack of integration among the functions of strategy, evaluation, and learning. Positioning L&E in service of strategy requires that the foundation create ways in which L&E staff are actively engaged with strategy processes, and that L&E activities are intentionally embedded throughout decision processes and strategy workflows. These considerations apply across the strategy life cycle, including developing new strategy, implementing and adapting existing strategy, and making decisions about exiting or refreshing strategy.

In making the transition to more effectively integrate strategy, learning, and evaluation, we offer two practical considerations: 1) Strategy must be made visible and testable, and 2) L&E questions must be crafted such that they effectively inform strategic decisions.

### *Focus on Making Strategy Visible and Testable*

A necessary step in strategic learning is being able to describe the actual strategy that is being enacted. This description of strategy then becomes the central element with which L&E can be aligned. At the most basic level, strategy is simply "a set of logical hypotheses about how to achieve a goal" (Buchanan & Patrizi, 2016, para. 10). Strategy names an organization or team's mental models about how change happens, rather than merely describing what actions are being taken or what outcomes are supposed to occur. Being able to clearly describe the thinking that guides strategy is key to being able to test and learn about the results of this thinking.

To be successful in this, we need tools that support work in complex, adaptive systems. Many

<sup>1</sup> Many thanks to the Center for Evaluation Innovation and The Evaluation Roundtable for conversations at the September 2017 convening, where they offered ideas about the capacities and habits of effective learning, which sparked the conversations on which this article is based.

of us have stumbled when we tried to use traditional tools, such as theories of change and logic models, to describe actions and desired changes that are not linear and that have many unknowns. However, at its core, theory of change is an important idea. An actionable theory of change process should “increase awareness of the system of actors, conditions, and dynamics” (Patrizi et al., 2013, p. 53).<sup>2</sup> We found that making foundation strategy visible required us to reconsider assumptions and adjust our tools and practices to reflect different understandings of what foundation strategy is and how it functions. The Colorado Health Foundation (CHF) and the Kresge Foundation have experimented with ways to adapt standard evaluation tools (e.g., logic models, causal loop diagrams) in ways that help us describe the thinking behind the strategy, how this links to the foundation’s proposed actions, and what is expected to happen because of those actions. Assumptions and beliefs are surfaced, discussed, and documented so their validity can be assessed and reflected on.

In our work, we explicitly talk about theories of change as representations of the foundation’s current thinking about how to create change, not as plans of action or representations of the “right answer” about how to achieve impact. This positions them as tools for strategic learning; they contain hypotheses that can be tested and informed by a range of evidence, and they are documents we return to regularly as we assess what we are learning and refine our strategies.

### *Emerging and Shifting Strategy*

Strategic learning is still powerful for foundations where strategy is not yet fully formulated or when foundations are still exploring how they think about strategy. Within philanthropy, there remains some debate about whether strategy is a role that foundations should assume (Brest, 2015), but even the choice to not have an explicit strategy is in fact a strategy for how the foundation can effectively do its work. Strategic learning activities can play an important role in making strategic beliefs and assumptions visible in these circumstances.

*In our work, we explicitly talk about theories of change as representations of the foundation’s current thinking about how to create change, not as plans of action or representations of the “right answer” about how to achieve impact. This positions them as tools for strategic learning...*

In 2014, CHF chose to move from broad strategies to more defined strategic approaches. L&E staff saw an opportunity to help the organization integrate learnings from past work into the new strategy planning. But since the foundation hadn’t had clear outcomes or strategies in the past, the team needed a different way of distilling learnings. They capitalized on Mintzberg’s (2007) thinking around strategies as patterns of behaviors. This allowed them to analyze past grantmaking and policy work by looking for what patterns had emerged, how they connected, and what impact that work had. Staff discussions generated insights into what had been effective in helping move the foundation toward its intended results. Learnings that surfaced from this process were integrated into the design of the new strategies.

As a new foundation, the Episcopal Health Foundation (EHF) first focused on operational considerations of grantmaking (e.g., how to conduct due diligence, dealing with the required volume of grants). Strategy was not yet something considered or understood as core to the working of the foundation. Through their study of the field, L&E staff, in contrast, became laser-focused on identifying the underlying and unspoken strategy that guided decision-making at the

<sup>2</sup> Also see this reference for considerations of common pitfalls around how theory of change is often used.

*At first it can be difficult for staff to articulate what questions need to be answered to inform upcoming strategic decisions. But every foundation has natural cycles of decisions (e.g., grant cycles, initiative renewal decisions, getting board approval), and these can be used as starting points around which to build evidence gathering and strategic learning moments.*

foundation: What did our grant investments point to in terms of directional changes pursued? How did we recognize a good opportunity for other types of programmatic investment? And, now that the underlying assumptions guiding our behavior were more visible, how might we now articulate our thinking as testable hypotheses? Though simple, these were critical strategic conversations which, three years later, helped set the stage for a new outcome-focused strategic plan that provided greater clarity about desired results and the pathways the organization was testing to reach them.

### *Focus Evaluation and Learning on Strategic Decisions*

If the goal of strategic learning is to help organizations make better decisions about strategy — including what paths to pursue, how to implement, and when to exit or scale — then L&E needs to be directly positioned to address those questions. Making strategy visible, as discussed above, creates the groundwork to identify what L&E activities will be most useful to support strategic decisions.

Aligning L&E activities with the strategy process entails making sure the collection of evidence is useful to strategic decisions. Alignment requires L&E staff to ask and answer questions that will inform decision-makers. It also means that evaluative evidence must be available at the right time to be integrated into decision-making processes. Strategic decisions take into account many considerations beyond evaluative information: organizational values, identity, risk tolerance, others funders in the space, etc. The role of evaluative evidence is to help decision-makers distinguish among potential strategic choices, and provide information about those that are more likely to result in success.

When first starting its strategic learning practice, CHF's L&E team struggled to discern what, out of all possible evaluation questions, would be most useful to program staff. So they began asking: "What's the next strategic decision you need to make?" By identifying specific strategic decisions, the L&E team was able to assess what evaluative questions should be asked, what evidence would best inform the decision, when evidence needed to arrive, and when to schedule formal learning sessions about that evidence. This foundational concept has been so effective that CHF continues to integrate it into all of its L&E work.

At first it can be difficult for staff to articulate what questions need to be answered to inform upcoming strategic decisions. But every foundation has natural cycles of decisions (e.g., grant cycles, initiative renewal decisions, getting board approval), and these can be used as starting points around which to build evidence gathering and strategic learning moments.

### **Principle No. 2: Systematically Gather Evidence to Answer Questions About Strategy**

Gathering and reflecting on relevant evidence is central to strategic learning in every phase of the strategy process. A foundation's ability to engage in robust strategic learning is directly tied to its ability to generate, make sense of, and apply a variety of evidence to strategic decisions. Though this may sound expensive and dependent upon

special expertise, any size organization with any size budget can create a rigorous practice of learning from its evidence. Evidence is not just about investing in evaluation studies, though indeed these may be necessary to answer certain questions. Foundations have access to plenty of evidence from their own experiences in grantmaking, engagement with community, conversations with partners and grantees, understanding of political context, etc. Strategic learning should effectively leverage existing evidence as well as create whatever new evidence is needed to answer key strategic questions.

High-quality evidence relevant to strategy does not need to involve extensive, sophisticated evaluation. It does, however, require a disciplined focus on what evidence needs to be gathered to answer your questions. EHF began with just a few questions to answer for the board of trustees, e.g., What types of investments did the foundation make and where? Evaluation staff collected a small, standardized data set from each program area to answer these questions and validated these data with the teams on a regular cycle. This evidence then was available to support inquiry across program areas. For example, the data were used to discover which programs were reaching rural areas. In turn, this more descriptive inquiry prompted strategic questions: Why weren't programs reaching rural areas equally? What constituted sufficient reach in rural areas? What programmatic structures could be adjusted to improve reach when desired?

We choose carefully what we evaluate. At the foundations featured here, evaluation is an important tool for generating evidence about how our strategies are playing out. The priority for evaluation is at the strategy and initiative levels, and addresses questions about the ways in which the foundation's strategies are playing out. We prioritize evaluation studies around strategies where social change is complex, unknown, or risky; where the hypothesis for how change happens is more tentative; or the scale of investment raises the stakes for the foundation and its constituents.

*We prioritize evaluation studies around strategies where social change is complex, unknown, or risky; where the hypothesis for how change happens is more tentative; or the scale of investment raises the stakes for the foundation and its constituents.*

#### *What Counts as Credible Evidence?*

High-quality strategic learning involves deliberately and rigorously incorporating a variety of evidence sources into the strategy process. Though evaluation practice has traditionally grounded definitions of rigorous evidence in experimental methods (e.g., Nutley, Powell, & Davies, 2013), recent conceptualizations have challenged the evaluation field to adopt more inclusive thinking about what constitutes credible evidence (e.g., Schorr, 2012). This includes a challenge to evaluators to recognize the ways in which current conceptualizations of evidence reflect and reinforce dominant paradigms that contribute to inequity and oppression (e.g., Luminare Group, Center for Evaluation Innovation, & Dorothy A. Johnson Center for Philanthropy, 2017). Such thinking has been deeply impactful on our own practices around L&E, and is discussed in the later section on equity.

In 2018, CHF's L&E team wanted to develop the foundation's practice around incorporating multiple forms of evidence into strategic learning. They partnered with the Center for the Study of Social Policy (CSSP) to craft a definition of evidence for the foundation, and to describe what characteristics of evidence make it rigorous (see, e.g., Schorr & Gopal, 2016; Schorr, 2003). The L&E team used this framework to engage with program staff to help them recognize evidence

*An effective way to approach learning work is by seeking out and reshaping existing processes that provide opportunities to reflect or apply new thinking. This approach capitalizes on what staff already have built into their workload, but makes how that time is used more powerful.*

they were surfacing through their work in communities, and to build their skills around collecting, making sense of, and integrating this evidence with other sources to apply to their strategies.

#### *Using Evidence*

It is useful to remember that no matter how much evidence we gather — whether through evaluation or other means — this evidence will never be completely comprehensive, answer all possible questions, or clearly lay out which strategic path a foundation should take. Teles and Schmitt (2011) offer the useful metaphor of an intelligence analyst. The authors point out that although evidence only ever provides a partial understanding of the world and our work in it, it is entirely possible to take a variety of imperfect sets of evidence, apply critical thinking to assess its quality and value, and engage in sense-making that will provide a clear enough understanding of the world to inform our strategic actions.

An important learning from our own work was that high-quality evidence has the power to

inform thinking and raise new questions about strategy at any point in the strategy life cycle. During planning, foundations should gather evidence to understand the nature of the problem itself, potential solutions, what's been tried before and what happened, how communities are thinking and feeling about both the problem and solutions, etc. During implementation, foundations need evidence that allows them to compare what they intended to accomplish with the actual results they are experiencing, including the response to their strategy from various groups of constituents, interactions of the strategy with the context it's being enacted within, unintended consequences, and changes in outcomes.<sup>3</sup> High-quality evidence about both the context and results of strategy is necessary for effective strategic learning.

#### **Principle No. 3: Embed Strategic Learning Into Everyday Work**

A major challenge when introducing strategic learning practices can be the perception that it will create more work. This fear is legitimate, as any change can mean new and different work. An effective way to approach learning work is by seeking out and reshaping existing processes that provide opportunities to reflect or apply new thinking. This approach capitalizes on what staff already have built into their workload, but makes how that time is used more powerful.<sup>4</sup> Adding new structures should only happen when they have a clear and tangible benefit that could not be achieved through what already exists.

#### *Integrating Into Existing Structures*

Begin with transforming meetings and activities already on your calendar. When Kresge created its learning and evaluation practice, grantmaking staff had the existing structure of a monthly two-hour meeting called Program Forum with rotating topics related to strategic and grantmaking interests. This meeting was identified by L&E staff as a rich opportunity

<sup>3</sup>These categories are deeply informed by the work done by CHF in partnership with CSSP around defining credible evidence.

<sup>4</sup>This is rooted in a concept from "emergent learning" (see <http://www.4qpartners.com/>). The fourth quadrant of an emergent learning table asks people to think about opportunities that are already on their calendars and to consider how to put their new thinking into practice during these already planned events, rather than creating a new "to do" list that will add to the work they already have planned.

for strategic learning. They reformatted the meeting to move away from topical lectures and toward interactive staff learning. L&E staff were clear upfront with other staff about what they were trying to accomplish, and invited staff into the experiment by explicitly naming that they wanted to try something a little different together. Some of the everyday practices Kresge has incorporated into the forum include case consultation (Heifetz, Linsky & Grashow, 2009), which allowed colleagues to present a question or challenge they are experiencing in real time and gain insight from peers, and trend mapping (Preskill, Gutiérrez, & Mack, 2017; Parkhurst & Reid, 2016) across grantmaking strategies for staff to consider how to bring a racial equity lens into their efforts.

At both Kresge and CHF, L&E staff leveraged existing meetings where program teams were taking stock, planning, and budgeting for the next year. These meetings were powerful opportunities to increase strategic learning because they were natural inflection points where program teams were engaging in strategic planning and making strategic decisions. L&E staff worked with the meeting owners to structure (and sometimes facilitate) opportunities for the program teams to discuss their theory of change, consider evidence about the intended and actual results for their strategies, and explore which of their strategic approaches were gaining traction and which were stagnating. The discussion also surfaced strategic questions that were top of mind for the program teams, which the L&E team could then feed back into their plans for future learning.

These two examples highlight major organizational practices — but don't underestimate the power of tweaking day-to-day activities that will allow you to have more effective strategic conversations. These opportunities are easy to overlook, but contain great potential for change. This might include weekly team meetings, check-ins with the CEO or board, lunch-and-learns for staff, conversations about grantee progress reports, site visits to grant applicants, etc. Existing opportunities abound and provide

rich forums to more effectively use the time we already have in a way that improves strategic learning.

### *Spanning Boundaries*

We limit ourselves when we stay within siloes of expertise and job function. At its best, strategic learning is shared across the organization because all staff have a common understanding of what change the foundation is seeking, and how their efforts contribute to mission. If L&E is to be effectively embedded into work across the organization, foundation staff need to be better at spanning boundaries and sharing ownership (see, e.g., Yip, Ernst, & Campbell, 2016).

This may come through organizational structures, decision authority, or simply cultural norms and behaviors. At CHF, strategy is overseen by a team made up of representatives from functions across the organization (including program, policy, and communications). L&E staff have always been included as a full part of this team, which provides them with direct connections to strategy and decision processes. This structure has provided a way for L&E staff to incorporate strategic learning nudges into strategy processes, including influencing strategy planning templates to include a theory of change, suggesting learning moments when the team could reflect on evidence about their strategy and plan next steps, co-leading staff reflection to build capacity around equity practices, and participating in designing and implementing organizational capacity building related to strategic learning (e.g., systems thinking, use of evidence).

Based on the desire to share ownership, Kresge has created a strategic learning champions group that includes a grantmaker from each of its program areas. This became possible because the L&E team gained the support of program managing directors to nominate a team member to serve for 18 months, and gained executive sponsorship and a budget to support learning needs. Champions help steward everyday discussion about what their teams are learning as they enact their strategies, often using the “What? So What? Now What?” experiential-learning cycle

*Recent thinking about equity in both foundation strategy and evaluation has invigorated conversations among L&E staff about how equity shows up in the work. Equity is not just something to measure about what changes "out there" in the world; it is a core value that should inform the way foundations think about their work, how they do their work, and how they assess their work.*

framework to guide more powerful discussions (Borton, 1970; Jasper, 2003). The group uses tools like before-and-after action reviews (Darling, Guber, Smith, & Stiles, 2016) to strengthen their team's view to a shared objective and assess the actions they are taking to reach the desired outcomes.

### **Equity and Community Engagement as Cornerstones of the Work**

Each of our foundations is committed to improving equity in the communities we serve, and our L&E teams are focused on figuring out how we improve equity in our own practices. The philanthropic learning and evaluation field is at an inflection point. Recent thinking about equity in both foundation strategy and evaluation has invigorated conversations among L&E staff about how equity shows up in the work. Equity is not just something to measure about what changes "out there" in the world; it is a core value that should inform the way foundations think about their work, how they do their work, and how they assess their work. This mindset is

causing some foundation L&E departments to deeply reflect on their own beliefs and practices, creating an important opportunity for greater alignment with commitments to equity and justice. This is the time for us all to have courageous conversations about the history of evaluation, the taken-for-granted paradigms and beliefs which guide our practice, and the ways in which the practice of evaluation can serve to perpetuate the very inequities foundations are often dedicated to improving. Those engaged in L&E need to consider how they reflect equity in the work, and how they use evaluation to illuminate and disrupt the systemic injustices that promote oppression. Each of us, in our respective foundations, has been deeply influenced by longtime thinking on issues of data collection, measurement, equity, and evaluation (e.g., Philanthropic Initiative for Racial Equity, 2008), as well as the more recent Equitable Evaluation Initiative.<sup>5</sup>

A key consideration around equity in both foundation strategy and L&E practice is rooted in engagement with community. Our discussion has focused on how a foundation can establish strategic learning about its own strategy. After all, foundations are not just bankrolling change — they are active decision agents and actors within the very systems they seek to support or disrupt. To become continuously better at this work, it is necessary that they engage in high-quality strategic learning. But foundations are ultimately institutions that enact their strategies in partnership with others (e.g., nonprofits, government entities, policymakers, businesses, resident groups) who are actually on the front lines of social change, every day. If foundations are to embed L&E effectively into their strategic thinking, it must reflect and integrate the expertise and experience of these partners. This means foundations need to improve both their will and skill around listening and partnering with community as part of their strategic learning processes, including strategy design, implementation, and adaptation. At our foundations, we are consciously improving our practice around community engagement, knowing we have not yet fully achieved our vision. This has included

<sup>5</sup> See [www.equitableeval.org](http://www.equitableeval.org)

such steps as including community in the process of evaluation (including design, analysis, interpretation), constructing learning designed to benefit both the foundation and its partners, sharing control over evaluation resources and decisions, and providing direct technical assistance around learning and evaluation to grantee partners as they make strategic decisions for their own organizations.

## Conclusion

The concept of strategic philanthropy is relatively popular among foundations seeking social change, and positions the foundation as an active participant in crafting social change rather than simply a funder of others who are interested in change. This role for foundations necessitates that they continuously, and effectively, improve the way they engage in strategy. Having a robust practice of strategic learning provides foundations a mechanism through which to continually improve their strategies and practices, so they can enhance the likelihood they will achieve the outcomes they are seeking.

Creating a really effective practice of strategic learning is no easy feat for any organization, as it necessitates an integration of strategy, evaluation, and learning. Our own experiences in crafting strategic learning have led us to believe that the three principles shared here are necessary for an effective practice of strategic learning: 1) position learning and evaluation in service of strategy, 2) systematically gather evidence to answer questions about strategy, and 3) embed strategic learning into everyday work.

Building an organization's capacity to do strategic learning brings with it considerations about how this might be affected by an organization's existing culture. An excellent first step is to intentionally assess the culture of your organization. Consider what attributes may support or detract from strategic learning, and design learning to take these into account. It's also helpful to understand: Why do we aspire to integrate strategic learning into our work? What's behind this intention? What do we hope to gain from this? Doing so helps create a full, and more visible, picture of why your foundation aspires to

*Our own experiences in crafting strategic learning have led us to believe that the three principles shared here are necessary for an effective practice of strategic learning: 1) position learning and evaluation in service of strategy, 2) systematically gather evidence to answer questions about strategy, and 3) embed strategic learning into everyday work.*

integrate strategic learning and what it will take to get there. Some components of culture might need to change to support the vision for strategic learning, which can necessitate broader organizational changes beyond those over which L&E staff have direct influence. Yet, in our experience, a substantial amount can be accomplished without taking on wholesale organizational change, and changes created by smaller shifts will often trigger larger shifts that couldn't otherwise have been accomplished.

We started within our spheres of influence in our own foundations. We discovered that we were indeed able to influence our contexts in important ways, although our practice was also shaped by the context and culture of our organizations. It can be beneficial to bring an organizational-change mindset when designing strategic learning — that is, the ability to design and lead a nonlinear, adaptive process that drives toward a particular vision for change. There is a wealth of literature that we encourage you to explore around organizational culture and organizational change, as it provides valuable insights for considering how to approach building and

*The core principles discussed here serve as stepping stones for those interested in using learning and evaluation to improve strategy, regardless of whether they are just starting out or working to improve their current practices.*

improving strategic learning practices (e.g., Coffman & Beer, 2016).

### Action Steps

We offer here a few additional thoughts for those considering how to strengthen strategic learning in their foundation.

*Start small.* It can be daunting to think about where to start with strategic learning. An effective approach can be to start with gaining clarity about what successful strategic learning would look like for your organization, and then seek out small opportunities to move the organization in that direction. Good starting points can be with staff who take a keen interest in learning or would be open to integrating it into their work differently, or places where there is an imminent decision that could be informed by evidence or facilitated learning activities. Don't aim for wholesale change from the start; instead, focus on small changes that provide opportunities to test what will be effective and really resonate within your organization. Over time, increase the use of learning approaches that are effective and let go of those that are not working as well.

*Learn deliberately.* The best learning takes some planning and prioritization. Starting with current opportunities is effective, but over time it's important to start building practices that allow for learning and evidence gathering to be planned ahead of time. Crafting longer-term plans to support learning around a strategy helps

integrate the collection of evidence, appropriate moments for reflecting and learning from the evidence, and application to strategic decisions. Achieving more deliberate learning involves identifying the key decisions and timeline for a body of work, and engaging with program staff and leadership to clearly understand what strategic questions need to be answered to inform key decision moments. This can be a space where L&E staff need to consider enacting new practices or templates to document plans for evaluation and learning across the life cycle of a strategy.

*Get better at learning.* A key challenge of strategic learning is that few people in foundations, including L&E staff, have necessarily had any formal training in how to do it well. Many L&E staff come from backgrounds in research and evaluation, disciplines which are often disconnected from organizational strategy. To effectively support strategic learning, L&E staff may need to build their own skills in multiple areas, including evaluation, strategy, learning, facilitation (e.g., Coffman, 2016), and equity.

A robust commitment to strategic learning is a key to success for mission-driven organizations seeking social change. The core principles discussed here serve as stepping stones for those interested in using learning and evaluation to improve strategy, regardless of whether they are just starting out or working to improve their current practices.

## References

- BOLDUC, K., BUTEAU, E., LAUGHLIN, G., RAGIN, R., & ROSS, J. A. (2007). *Beyond the rhetoric: Foundation strategy*. Cambridge, MA: Center for Effective Philanthropy. Retrieved from <http://www.effectivephilanthropy.org/wp-content/uploads/2014/01/BeyondtheRhetoric.pdf>
- BORTON, T. (1970). *Reach touch and teach*. London, UK: Hutchinson.
- BREST, P. (2015, April 27). Strategic philanthropy and its discontents. *Stanford Social Innovation Review*. Retrieved from [https://ssir.org/up\\_for\\_debate/article/strategic\\_philanthropy\\_and\\_its\\_discontents#](https://ssir.org/up_for_debate/article/strategic_philanthropy_and_its_discontents#)
- BUCHANAN, P., & PATRIZI, P. (2016, October 4). Ditch strategic philanthropy — but don't throw out strategy with it. *Chronicle of Philanthropy*. Available online at <https://www.philanthropy.com/article/Opinion-Ditch-Strategic/237938>
- COFFMAN, J. (2016). *Oh for the love of sticky notes! The changing role of evaluators who work with foundations*. Retrieved from <https://medium.com/@jcoffman/oh-for-the-love-of-sticky-notes-the-changing-role-of-evaluators-who-work-with-foundations-66ec1ffed2e4>
- COFFMAN, J., & BEER, T. (2011). *Evaluation to support strategic learning: Principles and practices*. Washington, DC: Center for Evaluation Innovation. Retrieved from <https://www.evaluationinnovation.org/publication/evaluation-to-support-strategic-learning-principles-and-practices/>
- COFFMAN, J., & BEER, T. (2016). How do you measure up? Finding fit between foundations and their evaluation functions. *The Foundation Review*, 8(4), 27–43. <https://doi.org/10.9707/1944-5660.1325>
- DARLING, M., GUBER, H., SMITH, J., & STILES, J. (2016). Emergent learning: A framework for whole-system strategy, learning, and adaptation. *The Foundation Review*, 8(1), 59–73. <https://doi.org/10.9707/1944-5660.1284>
- HEIFETZ, R. A., LINSKY, M., & GRASHOW, A. (2009). *The practice of adaptive leadership: Tools and tactics for changing your organization and the world*. Cambridge, MA: Harvard Business Press.
- JASPER, M. (2003). *Beginning reflective practice*. Cheltenham, UK: Nelson Thorn.
- LUMINARE GROUP, CENTER FOR EVALUATION INNOVATION, & DOROTHY A. JOHNSON CENTER FOR PHILANTHROPY. (2017). *Equitable evaluation project framing paper*. Equitable Evaluation Initiative. Retrieved from <https://drive.google.com/file/d/1RBWoWVduMvh4S68qdmPLN3WPEyPWQwOS/view>
- MINTZBERG, H. (2007). *Tracking strategies: Towards a general theory of strategy*. New York City, NY: Oxford University Press.
- NUTLEY, S., POWELL, A., & DAVIES, H. (2013, February). *What counts as good evidence?* Retrieved from <https://www.alliance4usefulevidence.org/assets/What-Counts-as-Good-Evidence-WEB.pdf>
- PARKHURST, M., & REID, C. (2016, August 18). New systems thinking tool: Trend mapping [Web log post]. Retrieved from <https://www.fsg.org/blog/new-systems-thinking-tool-trend-mapping>
- PATRIZI, P. (2010). Strategy evaluation: Emerging processes and methods. *New Directions in Evaluation*, 10(28), 87–102.
- PATRIZI, P., HEID THOMPSON, E., COFFMAN, J., & BEER, T. (2013). Eyes wide open: Learning as strategy under conditions of complexity and uncertainty. *The Foundation Review*, 5(3), 50–65. <https://doi.org/10.9707/1944-5660.1170>
- PHILANTHROPIC INITIATIVE FOR RACIAL EQUITY. (2008). *Critical issues forum: Measuring what we value*. Washington, DC: Author. Retrieved from <https://web.archive.org/web/20170619084500/http://www.racialequity.org/docs/final%20layout.pdf>
- PRESKILL, H. (2017, November 27). What have we learned about learning in the past 10 years? [Web log post]. Retrieved from [https://fsg.org/blog/what-have-we-learned-about-learning-past-10-years?utm\\_source](https://fsg.org/blog/what-have-we-learned-about-learning-past-10-years?utm_source)
- PRESKILL, H., GUTIÉRREZ, E., & MACK, K. (2017). *Facilitating intentional group learning: A practical guide to 21 learning activities*. Boston, MA: FSG. Retrieved from <https://www.fsg.org/tools-and-resources/facilitating-intentional-group-learning>
- SCHORR, L. (2003). *Determining “what works” in social programs and social policies: Toward a more inclusive knowledge base*. Washington, DC: Brookings Institution. Retrieved from <https://www.brookings.edu/research/determining-what-works-in-social-programs-and-social-policies-toward-a-more-inclusive-knowledge-base/>
- SCHORR, L. (2012, Fall). Broader evidence for bigger impact. *Stanford Social Innovation Review*. Available online at [https://ssir.org/articles/entry/broader\\_evidence\\_for\\_bigger\\_impact](https://ssir.org/articles/entry/broader_evidence_for_bigger_impact)
- SCHORR, L., & GOPAL, S. (2016, August 3). Broadening the evidence base without “defining evidence down” [Web log comment]. *Stanford Social Innovation Review*. Retrieved from [https://ssir.org/articles/entry/broadening\\_the\\_evidence\\_base\\_without\\_defining\\_evidence\\_down#When:15:30:00Z](https://ssir.org/articles/entry/broadening_the_evidence_base_without_defining_evidence_down#When:15:30:00Z)
- TELES, S. & SCHMITT, M. (2011, Summer). The elusive craft of evaluating advocacy. *Stanford Social Innovation Review*. Retrieved from [https://ssir.org/articles/entry/the\\_elusive\\_craft\\_of\\_evaluating\\_advocacy](https://ssir.org/articles/entry/the_elusive_craft_of_evaluating_advocacy)

YIP, J., ERNST, C., & CAMPBELL, M. (2016). *Boundary spanning leadership: Mission critical perspectives from the executive suite*. San Diego, CA: Center for Creative Leadership. Retrieved from <https://www.ccl.org/wp-content/uploads/2015/04/BoundarySpanningLeadership.pdf>

**Kelci M. Price, Ph.D.**, is senior director for learning and evaluation at the Colorado Health Foundation. Correspondence concerning this article should be addressed to Kelci M. Price, Colorado Health Foundation, 1780 Pennsylvania Street, Denver, CO 80203 (email: [kprice@coloradohealth.org](mailto:kprice@coloradohealth.org))

**Chera Reid, Ph.D.**, is director of strategic learning, research, and evaluation at The Kresge Foundation.

**Suzanne Kennedy Leahy, Ph.D.**, is senior managing associate at Working Partner, a Houston-based strategic planning and evaluation consulting group, and former director of evaluation at the Episcopal Health Foundation.

## Working Contexts

**The Colorado Health Foundation** is the nation's third largest health-focused foundation, with annual giving in excess of \$100 million, a staff size of about 65, and a commitment to bringing health in reach for all Coloradans. The learning and evaluation team is made up of four dedicated staff, is separate from the program team, and is integrated into the foundation's strategy teams as a full partner.

**The Kresge Foundation**, with a focus on promoting human progress, fulfills its mission by building and strengthening pathways to opportunity for low-income people in America's cities, seeking to dismantle structural and systemic barriers to equality and justice. In 2017, Kresge awarded grants totaling \$144.2 million and made social investment commitments totaling \$51.7 million to organizations that expand opportunities in American cities for low-income people. The Strategic Learning, Research, and Evaluation practice sits within the executive office and has four team members. The team brings an equity lens to all of its efforts.

**The Episcopal Health Foundation** was launched in 2014 and is based in Houston, Texas. Its mission is to transform the community health of a 57-county region of southeast Texas. The foundation has several programs, applied health research, community and congregational engagement, and had grantmaking to health organizations in excess of \$30 million in 2017. Learning and evaluation had been closely coordinated during the first several years of the foundation's operation, but in 2017 organizational restructuring separated these functions, with evaluation falling under the research program and learning placed within the administrative arm of the president's office.