



REIMAGINING SOCIAL CHANGE

Learning How to Learn: Embedding Intentional Group Learning into Your Foundation

FSG WEBINAR | FEBRUARY 23, 2017

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Introductions



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“Learning is the process that enhances knowledge, which is the capacity for effective action.” – Peter Senge

“A commitment to learning **requires time, effort, and resources**. That is, to support ongoing learning, whether it is in an organization, in long-term partnerships, or in learning communities, people need time to come together, with a **clear purpose** for learning, with **adequate planning** and preparation, and with **skilled facilitators**.”

--Facilitating Intentional Group Learning, FSG (2017)

Structures and places for learning

Weekly, Bi-weekly, or Monthly Meetings

- Staff meetings
- Advisory committee/advisory group meetings
- Working group meetings
- Communities of practice
- Task force meetings
- Project meetings
- Company/organization-wide meetings
- Steering committee meetings
- Professional (internal or external) affinity groups

Bi-Monthly, Quarterly, Semi-annual, or Annual Meetings

- Annual staff or team retreats
- Board meetings
- Annual learning retreats

Special Topic Meetings

- Brown bag lunches
- Grantee and partner convenings
- Expert talks
- Site visits
- Community forums and town halls
- Fundraising events

Goals of group learning activities

- 1** To individually and collectively increase our understanding and develop new perspectives
- 2** To generate new ideas and/or solutions
- 3** To make important decisions

Learning activities we will be discussing today

ACTIVITY	PEOPLE	TIME	GOALS			OTHER CRITERIA	
	Ideal number of participants	Approximate time needed	Promote greater awareness & understanding	Generate new ideas and/or solutions	Make a decision	Involves the use of quantitative and/or qualitative data	Can be used when participants are in different locations
Sample Activities							
Trend Mapping	5-15					OPTIONAL	YES
Data Gallery	10-100					YES	NO
What? So What? Now What?	8-100					OPTIONAL	YES
Appreciative Inquiry	20-100					NO	NO
World Café	20-100					NO	NO
Chalk Talk	5-10					OPTIONAL	NO

The Kresge Foundation's Experience

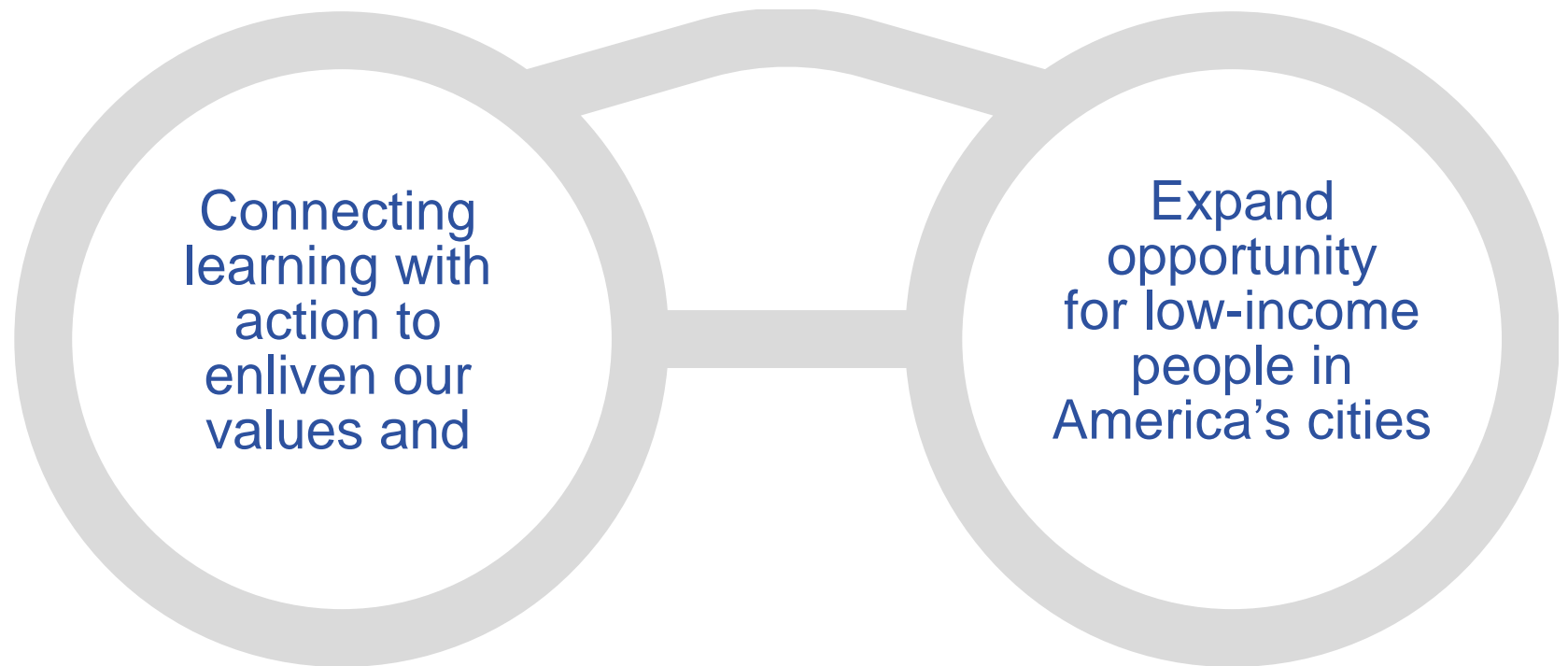


Chera Reid

Director of Strategic Learning,
Research and Evaluation

February 23, 2017

Vision for Strategic Learning and Evaluation



What is the goal of learning together?

To individually and collectively increase our awareness and understanding and to develop new perspectives. Groups engage in learning together to better understand an experience, situation, system, issue, or opportunity, as well as understand different, and potentially competing, perspectives.

From: *Facilitating Intentional Group Learning, FSG*

Kresge context

- Gain a better understanding of systems thinking
- Practice systems thinking together

Setting the Context

Context	Description
Setting	Monthly Program Forum
Time	90 minutes
Participants	About 30 staff across levels from the Program, Social Investments, Communications, and Program Operations department
Resources	GEO Systems Grantmaking Resource Guide, FSG Systems Tool Matrix, FSG Facilitating Intentional Group Learning

Practicing Systems Thinking: Trend Mapping

Trend map: A visual depiction of relevant trends influencing the system around a given topic. It is developed using the collective knowledge and experience of a group of people familiar with a given system and its context.



Trends can be increasing or decreasing; Supporting or impeding



We are thinking about trends broadly (political, economic, social, demographic, media).



We will also take a look at relationships between trend and energy in the system around these trends.

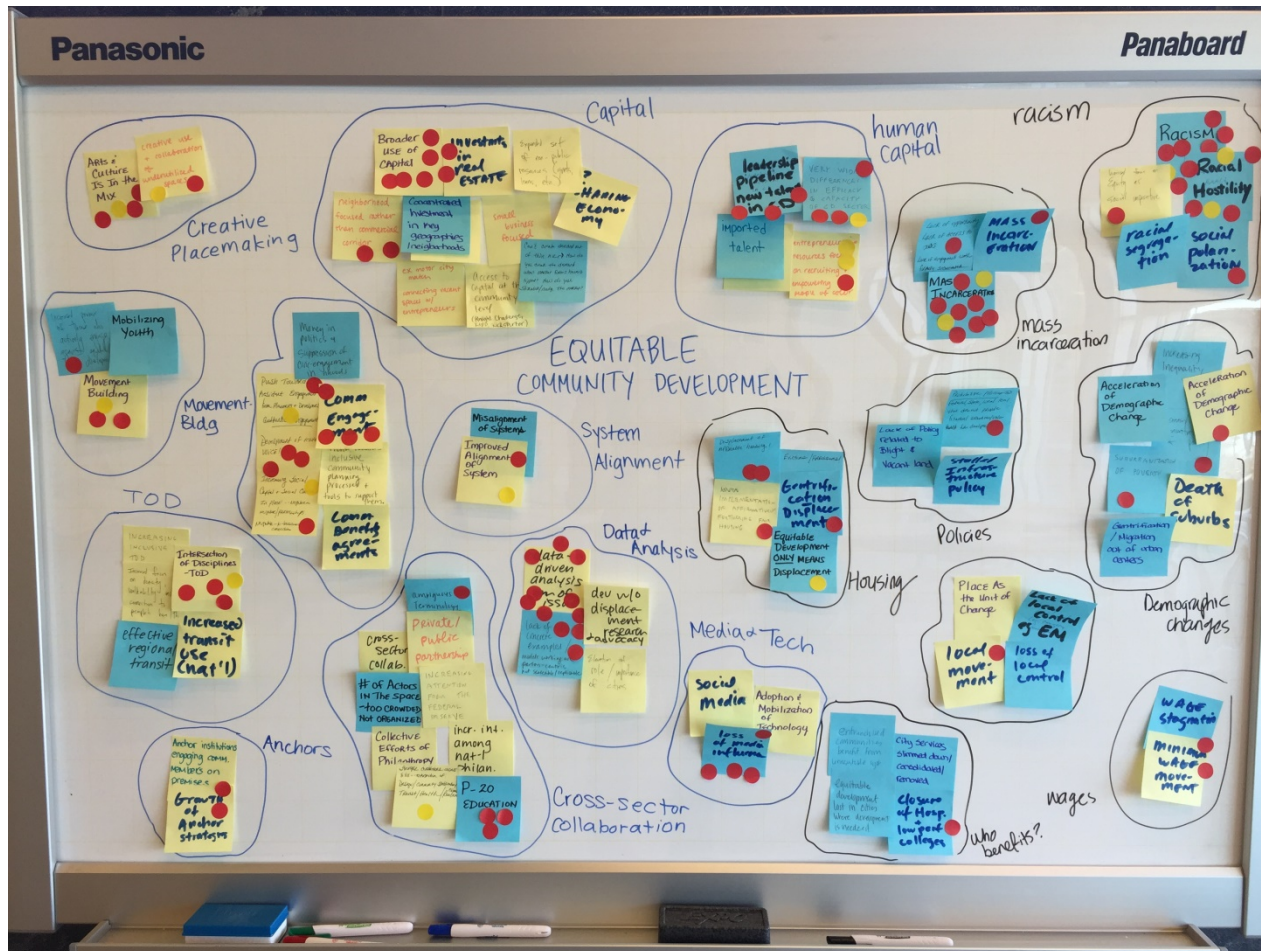


The value of the map depends on you. We all need to share our knowledge and experiences.





What are the major trends?





Our Journey to Creating a Learning Culture

Measurement and Evaluation for Learning and Outcomes (MELO)

Pamela Schwartz, MPH
Senior Director for Community Health Impact and Learning
Community Benefit, Kaiser Permanente

February 23, 2017



Why this? Why now?

Why: Increased urgency to more systematically measure our efforts



Purpose: Be more intentional about how measurement & evaluation can strengthen our strategy to achieve desired outcomes



Process & Products: Develop a shared understanding of our strategies w/

Theories of Change

Learning Questions

Indicators & Outcomes

Learning Plans



We developed some products, but now what?



Assessing Our Readiness for Learning

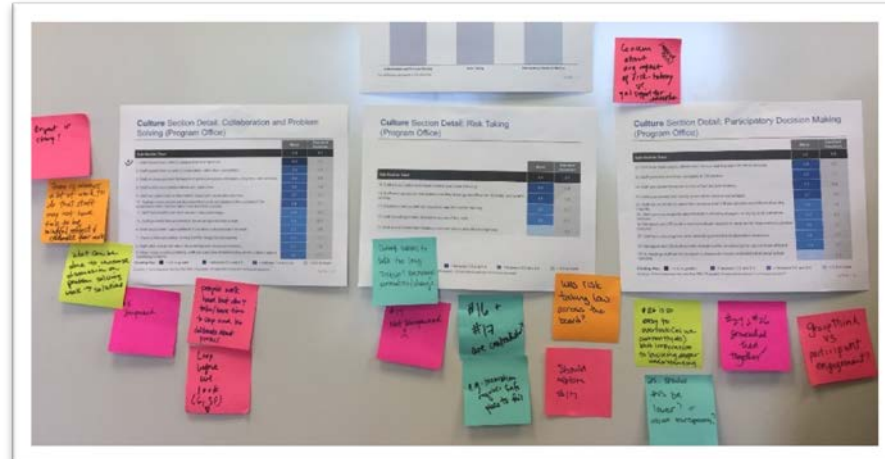
Goal: Use data and experiences to build a culture of evaluation and learning

Multi-pronged approach to reflecting on and using the findings

Learning Goal: To individually and collectively increase our awareness and understanding and to develop new perspectives

Data Gallery

What? So What?
Now What?



A Deeper Dive: Generating Solutions

Learning Goal: To generate new ideas and/or solutions

Appreciative Inquiry

World Café



Next Steps

Develop and deploy changes in response to ROLE survey results

Summary of ROLE survey recommendations

Risk Taking	• More deeply understand and address constraints on risk-taking and experimentation
Time	• Make space and time for intentional problem solving through stronger prioritization and changes to planning processes
Problem Solving and Decisionmaking Processes	• Provide stronger leadership expectations for problem solving
Accessibility & Relevance of Data	• Provide better access to useful data through knowledge management systems and staff resources • Ensure that CB produces the kinds of data staff need and can use
Red Tape	• Meet with groups of staff to identify specific aspects of CB/KP that are creating red tape; study those further to develop tactical solutions

ROLE survey finding: there is strong support among staff for incorporating more measurement, evaluation and learning into CB's work

Nearly 200 staff members have participated in developing and implementing MELO, including regional leads, workstream leaders and the membership of key COPs

"Measurement, Evaluation, and Learning" was the highest scoring section of the ROLE

See attached memo:

Readiness for Organizational Development and Evaluation Survey (ROLE) Responses from All Participants (n=83 from PO, CO, Peer Group, and CB Evaluators)		Mean	Standard Deviation
Section Total		4.2	0.6
Measurement, evaluation, and learning would help us provide better programs, processes, products and services.		4.6	0.5
The integration of more measurement, evaluation, and learning activities into our work would enhance the quality of decision-making.		4.5	0.7
It would be worthwhile to integrate measurement, evaluation, and learning activities into our daily work practices.		4.3	0.9
Managers and CB leaders would like us to measure, evaluate, and learn from our efforts.		4.3	0.7
Doing more measurement, evaluation, and learning would make it easier to convince managers of needed changes.		4.0	0.9
This would be a good time to renew or intensify efforts to support measurement, evaluation, and learning.		4.0	0.9
There would be support among staff if we tried to do more measurement, evaluation, and learning work.		3.9	1.0

Shading Key: ■ = 4.0 or greater ■ = between 3.5 and 3.9 ■ = between 3.0 and 3.4 ■ = 2.9 or lower
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Building a Culture/Structure for Learning

Take advantage of early adopters and “easy wins”

Develop a plan to operationalize

- Build evaluation capacity
- Clarify roles & responsibilities

Set shared expectations with stakeholders

Keep exposing folks to learning and reflect/improve

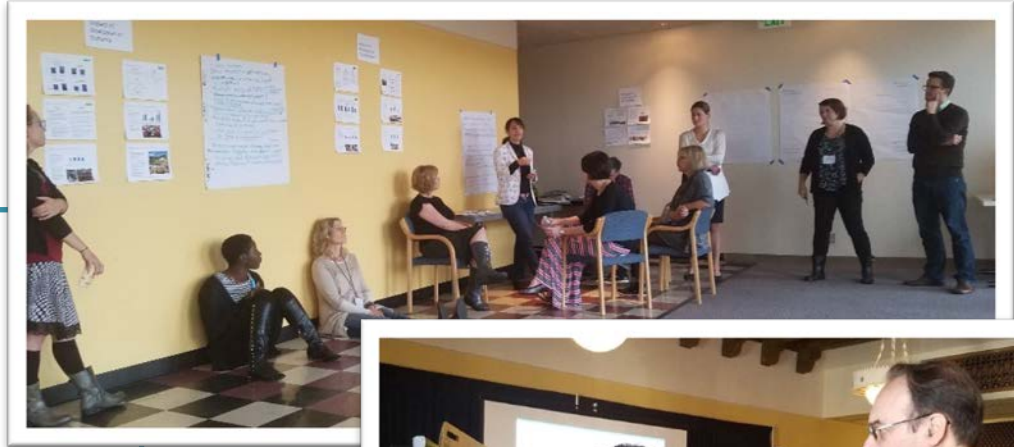
CB Strategy Learning Action Plan (12/28/16)

CB Learning Question	Activity	Data Inputs	Facilitation	Who	Lead	Date	
5. To what extent and in what ways are we evolving the CB program to meet the needs and expectations of key stakeholders (e.g. our communities, partners, regulators), communicating about the work effectively, and sustaining KP's leadership in the field? (includes election-related learning)	A	Develop awareness and understanding of the past and current alignment between CB investments and identified community needs; generate insights about what is helping or inhibiting alignment; and make decisions about how investments can shift in the future to create greater alignment	A chart showing CB's level of investment (and/or staff effort) dedicated to each community health need for each region over the last few years OR summary of the results from learning activities conducted at regional level	What? So What? Now What?	CB Peer Group	Pam	March CB Peer Group Meeting
	B	Develop awareness and understanding of the lifecycle of various aspects of the CB portfolio; decide what activities the program needs to stop doing to accommodate new approaches/activities as well as which activities will require greater attention	Eco-cycle Mapping (conducted at regional level with CCHE)		CB Peer Group	Pam	Sept or Dec CB Peer Group Meeting
6. To what extent and in what ways is CB contributing to the evolution of KP as a Total Health organization (e.g., leveraging non-CB assets to achieve our goals, contributing to the Total Health strategy)?	C	Understand how CB leaders around the nation are leveraging non-CB assets to achieve Total Health Goals; generate ideas for how to more effectively leverage non-CB assets to address community needs. (Potential questions: How is THNA showing up? How do we feel about that? What are you excited about? What will success look like? What's working or not?)	Inventory of leveraged assets for Total Health from each of the 42 CHNA regions and PO's IS reports, TH goals for each function	Data Placemats Or What? So What? Now What?	CB Peer Group	Pam	January CB Peer Group Meeting
	D	Develop understanding and awareness of how recent Total Health pilots are leveraging non-CB assets and generate ideas for how these pilots should influence practice	Profiles of three THNA pilots and activities	Collective Story Harvest (or Appreciative Inquiry)	Total Health Meeting	Pam	January 2017



Spreading a Learning Culture

Building a cadre of staff to spread a culture of evaluation & learning



Example: Exploring policy implications of a new administration



Q&A



Thank You to Our Panelists!



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Get Today's Resources on FSG.org

Download *Facilitating Intentional Group Learning* and today's slides:

<http://fsg.org/tools-and-resources/facilitating-intentional-group-learning>

The recording from today's event will be available shortly at that link!

