



# Engaging in Strategic Learning: A Brief for Board Members and Trustees

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Foundations play a critical role in addressing some of the most pressing social problems. As our world has become increasingly interconnected and unpredictable, it is more important than ever for foundations to learn from their work and adapt for greater impact. *Strategic learning* can help foundations do this by identifying what's working well and what adjustments are needed to move the work forward.

You and your fellow board members or trustees, as stewards of your organization's vision and resources, are influential in determining the direction of your organization. This brief is designed to help you better understand what strategic learning is, why it is important, and what you can do to support continuous learning in your organization.

## How You Can Support Strategic Learning

Strategic learning is the use of data and insights from a variety of information-gathering approaches—including evaluation, research, and performance metrics—to inform decision-making about strategy. It is fundamentally about sense-making, reality checking, assumption testing, and answering questions—all of which increase your ability to understand your organization's progress, influence, and impact from its activities and investments.<sup>1</sup>

We have identified six things you can do to better understand, value, and support strategic learning within your organization, as well as potential questions to ask yourself and fellow board members or trustees:

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<sup>1</sup>Coffman, J., & Beer, T. (2011). Evaluation to support strategic learning: principles and practices. Center for Evaluation Innovation.

1. **Understand the necessity of and advocate for strategic learning:** Support the organization’s commitment to learning from data and experiences about what works, what doesn’t, and why. Help provide human and financial resources to collect and use data for decision-making and continuous learning.

**Ask:** As a board, how do we learn about what is going well and what needs to be changed regarding our organization’s strategy, grants, and role in the field? Are there new or different ways we want to learn about our work?

2. **Develop and use strategic learning questions to guide your decisions and actions:** Strategic learning questions highlight important information; they guide the organization’s strategy as it evolves, and they stimulate the collection of information to guide that process. Strategic learning questions are typically grounded in a program or organization’s theory of change<sup>2</sup> and can be used to enhance understanding of context, examine assumptions, collect feedback on effectiveness of initiative design or implementation, and assess progress toward interim outcomes and/or ultimate impact.

**Ask:** What do we need to know about our work in order to better understand our progress? What are the questions we as a board keep asking ourselves about the effects, influence, and impact of the work?

3. **Value and consume different kinds, levels, and presentations of data:** While dashboards, scorecards, and other quantitative metrics may provide a glimpse into your organization’s work, there are serious limitations when relying on numbers alone. Be open to reviews of grantee and/or beneficiary experiences, interview quotes, photographs, videos, or other qualitative data that may afford a more nuanced picture of a strategy’s progress, outcomes, and impact.

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<sup>2</sup>A “theory of change” is often a visual depiction of how your work leads to the changes you seek, and it serves as a great tool for boards and trustees to reflect on, react to, and identify questions it raises for measuring progress and impact.

**Ask:** What kinds of information, and from whom, do we as a board find most useful to our discussions and decision-making processes (e.g., metrics, stories, quotes, examples, site visits)? Are there other kinds of information that we do not currently use, but that could present a different or more insightful picture of our work?

4. **Value and build in time for reflection and dialogue in pursuit of strategic learning during board/trustee meetings:** While board members have limited time together, it is important to carve out time for collective sense-making using data provided by programs as well as others in the organization or the field. Consider adding time for strategic learning conversations to the next committee meeting or board retreat to reflect on questions, new data, and their implications.

**Ask:** How could we change the ways we spend our time together to create more opportunities to develop deeper understanding about the progress, effects, influence, and impact of our work?

5. **Understand the importance of, and be explicit about, integrating an equity focus into the organization's work:** Deepen your understanding of who is most significantly affected by issues your organization aims to address, what historical context and underlying causes may be particularly relevant, and the inherent power dynamics that are present. Engage in ongoing conversations about how to integrate a focus on equity into your organization's work.

**Ask:** To what extent and in what ways is our organization committed to a more equitable future? How can we better understand the cultural and historical context of our work? How can we be more accountable to the communities we serve? What roles might learning and evaluation play in the organization?

6. **Understand the nature of systems change and complexity and how this relates to the organization's work:** Most social impact work aims to change long-standing and entrenched problems held in place by social, political, and economic systems. To effectively steer the organization, you need a common understanding of the nature of systems change (e.g., relationships and connections, resource flows, policy, mental models, power, and practice).<sup>3</sup>

**Ask:** To what extent is the work we are supporting complex? In what ways are various systems involved in addressing the problem, and what are the implications for how we do our work and understand its impact?

## How You Can Support Strategic Learning

Engaging in strategic learning is essential to addressing today's social challenges. Your organization's senior leaders and evaluation and learning staff can provide guidance and thought partnership as you learn more about strategic learning and begin to consider how learning from data and experiences can be integrated into your work.

*This brief was adapted from a larger toolkit developed by FSG and Grantmakers for Effective Organizations (GEO) for foundation senior leaders and evaluation and learning directors, [Engaging Boards and Trustees in Strategic Learning: A Toolkit](#).*

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<sup>3</sup>Social problems can be understood as simple, complicated, and complex. Simple and complicated problems are predictable and repeatable, while complex problems are not. They are nonlinear, dynamic, and the result of a multitude of variables that influence each other in ever-evolving ways. Kania, J., Kramer, M., & Russell, P. (2014). Strategic philanthropy for a complex world. *Stanford Social Innovation Review*, 12(3), 26–33. Learning in this context requires approaches that are adaptive, flexible, and iterative. Preskill, H., Gopal, S., Mack, K., & Cook, J. (2014). *Evaluating complexity: Propositions for improving practice*. FSG.