"Operationalizing Strategic Learning for Social Innovations: Opportunities and Challenges"
Case Study: Funder and External Evaluator as Learning Partners

Context

- The Comprehensive Health Education Foundation transitioned its long-standing focus to a new content area: community-based health solutions. Its signature piece of this work, the Community Health Advocate (CHA) project, is designed to improve a low-income community's health status by training and supporting public housing residents to reach out to their family, friends and neighbors. This social innovation has deep implications for system and policy change related to the Affordable Care Act.
- This work requires both real-time data to make strategic programmatic decisions, and outcome data for potential funders. An external evaluator was engaged as a strategic learning partner. A prior working relationship between the two parties created safety and a willingness to engage in evaluation activities.

Strategies

1. **Set the stage for strategic learning to inform social change**
    a. **Collaborative design**. The learning partners worked together to design the Theory of Change, data collection activities, learning opportunities, and reporting requirements. An Appreciative Inquiry process prefaced this work, building a norm of honoring all voices.
    b. **Convey Strategic Learning ethic to project participants**. Participatory evaluation strategies and onsite Learning Circles convey shared learning orientation.
    c. **Codify Strategic Learning orientation in contractual understanding**. Strategic Learning processes, including Learning Circles, are written into the organization's contract with the evaluator.

2. **Balance the expectation around evaluation products**
    a. **Data collection**. Both internal and external learning partners assume data collection responsibilities.
    b. The evaluator **synthesizes** information into a **concise, digestible format** for the project. Project staff incorporate this information into supervision and project activities.

3. **Knowing we are on track**
    a. **Ability to respond to rapidly changing context.** Tracking project responsiveness to policy changes (i.e., housing policies regarding smoking and methamphetamine use, Affordable Care Act).

b. **Convene quarterly Learning Circles**. Staff and evaluator choose a strategic focus for each session. Staff and evaluator take on data collection tasks in advance. Each session begins with a review of progress made toward outcomes identified in the Theory of Change.

c. **Knowledge, attitude and behavior changes** are tracked for both key stakeholders and project participants.

Reflection & Learning

1) Setting the Stage for Strategic Learning to Inform Social Change

- Developing a Theory of Change surfaces internal tensions and sets the stage for the evaluation.
- Learning Circles serve multiple functions including providing an opportunity for project staff to determine the real time focus of the evaluation, a way to orient new staff and CHAs, and a vehicle to develop project leadership. This creates a tension between the need to orient new people and still move forward.

2) Balancing the tensions between funder expectations for retrospective and impact evaluations with real-time learning practices

- The nature of the work and the project's need to respond to rapidly changing external factors have not lent themselves to capturing traditional outcome metrics.
- As we seek to expand the project, the tensions between funder expectations for retrospective and impact evaluations with real-time learning practices that guide ongoing decision-making expand.
- In terms of client-evaluator relations, it can be difficult for some members of the client team to view the SL evaluator as a learning partner. It is hard to overcome the perception that the evaluation is about learning and not about performance.

3) Awareness that we are "on track" in a strategic learning process.

- Social innovation work takes place in a rapidly shifting dynamic context. Decisions made through the SL process may suddenly become less salient as new and unexpected opportunities arise.
- Ongoing data collection and reflection on alignment between outcomes and ToC provide evidence of being "on-track."

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