The Tools and Skills for Success: Designing a Learning Program to Strengthen Outcomes

April 3-4 2017
Portland, Oregon
Executive Summary: The Tools and Skills for Success: Designing a Learning Program to Strengthen Outcomes

The Futures Development Team -- representatives from 6 CAP agencies in three states, The Prosperity Agenda and Global Learning Partners met April 3-4 to conceptualize a design for a learning program that will be piloted as part of the Futures project. The pilot will be used to test the learning program and to test out how the Futures indicators can support agencies to tell a collective story about their impact.

The learning program will be piloted in the six agencies, and will build skills and habits for more consistent exploration and use of outcome data within agencies for their own ongoing learning and program improvement. At the same time, it will create the opportunity for sharing between agencies to support telling a collective story about their impact.

Over the two days, the team examined the organizational context, the key people involved the agency, and confirmed a broad purpose for this work. Then the team conceptualized key aspects of the learning program.

The Agency Context
This work will focus on the “human system” – how the people interact with the data and with each other around the data. It will not focus on how they interact with technology.

A few key insights about the “human system” emerged during the first day and they became fundamental to our thinking about the learning design:

- Agencies spend a lot of time and effort collecting a lot of data. Much of it is for external audiences (funders). Data is used more for compliance with requirements and less for learning. “If it isn’t required, it might not happen.”
- The tendency is for data to flow in one direction. (feedback loops are rare).
- Silos get in the way of seeing outcomes. And silos operate beyond the agencies amongst funders too. “They sit right across the hall from each other. Why can’t they walk across the hall to get that information?”
- Opportunities for cross program and cross-functional exploration around data, and clarity about what outcomes we are pursuing, are powerful for using data for ongoing learning and improvement.

“Data is a like a dark room. Where you point the light is what you see. We need to know where to point the light.”

1 Because of an injury, one agency representative was unable to attend.
Three Critical Roles
The learning program will focus on three principle data stewards within the agency with unique needs, and responsibilities related to outcomes data; caseworkers (data entry staff); middle managers; directors. TPA developed three personae, Carol the Casework, Meghan, the Manager and Dina the Director. (The complete personae are in the Appendix). The group used these personae to suss out learning needs and resources of the people in the agencies and their unique roles as data stewards:

Our reflections centered on the interconnections between these key staff groups and the opportunity to support learning in multiple directions. What can frontline staff teach top management about the story behind the data? What can top management teach frontline staff about what the data are saying about the big picture outcomes?

Giving a Shape to the Learning Design
Given the aggressive timeline, the goal for piloting something now that can be scaled to other CAP agencies, and the stated goal of using this work to support agencies to use the Futures Dimensions of Poverty as the framework for their exploration, we reviewed and refined design criteria:

The Learning Process will be Successful to the Extent that it ...
- Is scalable and modular (could be offered with multiple agencies, or for individual agencies).
- Uses data that is already being collected, related to the Futures indicators (rather than aims to increase data collection).
- Adapts to different agencies working in different programs and using different data systems
- Offers choice to agencies about where, and with whom to focus (Cafeteria)
- Primarily about intra-agency learning and decision-making AND contributes skills and opportunity for inter-agency learning (peer learning)
- Uses real work as the principle mechanism for learning (learning by doing).
- Is simple and powerful – the smallest thing that would make the biggest difference

Next Steps
- Revisit the timeline and map out development steps and check points with design team.
- Develop a proposed learning approach based on the thinking that came out of this meeting.
- Set up contracting conversations with agency leaders to present proposed approach, solicit input and confirm internal expectations of the project. Agree on how we will work with each agency individually.
- Share outputs of these meetings with design team.
Attendees

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* Charles and Jeanette both sustained an injury on Friday and were not able to join us for this two-day gathering.
### The Agenda

| MONDAY 8:30-12:00 | Welcome and overview  
| | Warm-up: My Favorite Tool  
| | Our Hopes, Expectations, a Few Guidelines  
| | The Summit – our vision of success  
| | A Look at the Findings  
| | Mapping the Human System  
| 12:00-1:00 | **LUNCH**  
| | The 8 Steps of Design  
| | The People and Their Situation -- Three Personas  
| | Core Principles for Strengthening Learning Outcomes  
| | Our Design Criteria  
| | Looking Backward, Looking Forward  
| 5:00 | *Closing*  
| TUESDAY 8:30-12:00 | Welcome back and Check in  
| | Overview of our day and Plan for this work  
| | Actions -- Beginning with end in mind  
| | Tools and skills  
| 12:00-1:00 | **LUNCH**  
| | Measures of our Success  
| | Next steps  
| 4:00 | *Closing*  

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Exploring stories about going from data to informed action
CAP agencies have experiences of learning from their data and using it to improve outcomes. We examined a story and exchanged our own stories to identify the conditions that support this kind of learning and change. Our work should aim to strengthen these conditions.

A Story to illustrate
“Our CAP organization notified local school districts that homeless children showing up late to school were not receiving breakfast and forced to go through the rest of the school day hungry. Breakfast had been stringently enforced... so after a certain time in the morning, the breakfast would be removed. After school districts heard this information, they changed their “breakfast serving” policy by leaving food out past the regularly scheduled time... so students arriving late could grab a snack and not go through the morning hungry. This information about homeless children from our CAP agency influenced system change with the local school system.”

From Data to Informed Action

The conditions in place that led to the change

- There was shared awareness about the data
- People had knowledge and choice
- It was communicated to the person/people who could take action
- There was some excitement around what we were learning
- There were resources to make the improvement
- The people were “bought in”
- We had a history and were able to see patterns and trends in the data
- We had a goal (knew where we were aiming) and we were able to adjust the goal.

Mapping the “Human System”

There is a wide diversity of data systems being used by CAP agencies – within the same agencies, across different agencies, and across all three states.

Our work will focus on the “Human System.” That is how the people within each agency work together to turn their data into learning and improved outcomes.

In Brent’s explorations at all six agencies, this picture of the “human system” emerged

In groups we redrew these maps and analyzed them, noting what facilitates, and what gets in the way of learning from our data to see and improve outcomes.

- Agencies spend a lot of time and effort collecting a lot of data. Much of it is for external audiences (funders). Data is used more for compliance with requirements and less for learning. “If it isn’t required, it might not happen.”
- The tendency is for data to flow in one direction (feedback loops are rare).
• Silos get in the way of seeing outcomes. Opportunities for cross program and cross functional exploration around data can be powerful.
• Agencies spend a lot of time and effort collecting a lot of data.
• Tendency for data to flow in one direction (feedback loops are rare).
• Data is collected, processed and reported mainly for external stakeholders -- funders. “If it isn’t required, it might not happen.”
• Cross-functional team structure at Common Ground has created a forum for collective analysis.
• Often more about outputs than outcomes.
• “Our data bases don’t talk to each other.” That dynamic also shows up in how people interact with data. “Not my place to interpret your numbers.”
• Within teams, there are not necessarily spaces to examine the outcome data we are collecting. I’m already thinking about what this means for how I interact with my own team.”

The Steps of Design: Building the Foundation of this Learning Program

The Anticipated Change: Our Summit

This project will support agencies in the three state community action network to use their data to see and track their clients’ progress in 13 dimensions of poverty in order to increase their impact on the lives of the people they serve.

As a result of this project, agencies will:

• Have a new level of interest in using data for themselves to make informed decisions and program refinement
• Consistently use select learning tools and processes
• Effectively analyze the data collectively to fill in the story and extract meaning for program improvement for their unique situation and agency
• Have a common language that allows them to “tell a shared story” of impact across the three state region.
From compliance to commitment: a reflection on ownership

We got stuck Tuesday morning on the “summit” statement, mostly around the topic of ownership – whose vision of success is this, and who are these indicators for?

The Futures work will either be “owned” by the agencies, or seen as yet another top down requirement they need to comply with. Our approach in this work will need to keep this question of ownership in mind. How do we generate internal demand for this program?

The Tuesday morning conversation was an excellent example of a culture of commitment, rather than compliance. Concerns were openly expressed. The dialogue focused on understanding, not fixing, the concerns. This set the stage for the group to chose when and how to return to the work at hand and to frame up the learning design with commitment.

The People and their Situation
TPA synthesized data collected in the visits to all six agencies by developing three personas. See appendix for the complete personas.

After reviewing the personas, we put ourselves into their shoes and imagined what they would tell us they wanted, needed, and didn’t want from this learning program.
Using Personas for Learning Design

Personas are research- or experience-based profiles of users -- in this case, learners. Much like marketing personas, they are helpful for customizing a learning program so that it so meets the needs, interests and unique situation of the learners. Used well, personas build empathy, which shines through in the learning program you create.

<table>
<thead>
<tr>
<th>Wants</th>
<th>Doesn’t want</th>
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</thead>
<tbody>
<tr>
<td>Efficient delivery, Free</td>
<td>To be vulnerable with funders if data are not what they want to see</td>
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<tr>
<td>Effective (internal) and Valuable (delivers a good product to the</td>
<td>(how can reporting be rich with explanations)</td>
</tr>
<tr>
<td>community)</td>
<td>Just hard numbers. Wants number and story</td>
</tr>
<tr>
<td>To provide professional development</td>
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**Needs**

- Communication with everyone
- Access to info
- Tool to share info
- Research for additional resources
- What data are the “right” data to collect?

<table>
<thead>
<tr>
<th>Wants</th>
<th>Doesn’t want</th>
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<tbody>
<tr>
<td>To empower my staff to free up time to support leadership</td>
<td>Measuring progress in smaller steps</td>
</tr>
<tr>
<td>Input from the community</td>
<td>Better advocacy for our agency with funders to manage data collection better</td>
</tr>
<tr>
<td>Equipping my staff with information – so that they understand the</td>
<td>An easy way to share information</td>
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<tr>
<td>value of the data they collect</td>
<td>Tools for stress management</td>
</tr>
<tr>
<td>To change the relationship with the funder and the community</td>
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<tr>
<td>Short and long term goals</td>
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<table>
<thead>
<tr>
<th>Wants</th>
<th>Doesn’t want</th>
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<tbody>
<tr>
<td>To be valued</td>
<td>To see the impact of the program on the client</td>
</tr>
<tr>
<td>To see the purpose for the process</td>
<td>Return on investment (class training = client gain)</td>
</tr>
<tr>
<td>Easy to learn and reduces workload</td>
<td>To know the big picture (access)</td>
</tr>
<tr>
<td>Something that allows for better communication of client impact to</td>
<td>Doesn’t want:</td>
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<tr>
<td>mgmt.</td>
<td>- Her time to be wasted</td>
</tr>
<tr>
<td>Clear process for picking the kind of data that shows impact (no</td>
<td>- To burden her client or waste client’s time</td>
</tr>
<tr>
<td>more/no less)</td>
<td>- Data that marginalizes the client</td>
</tr>
<tr>
<td>Perspective of big picture should grow</td>
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"I know we have our successes. I know we need to improve. The question is how?"

"We don’t need to reinvent the wheel. We should start connecting the dots instead."

"People in need should be seen as human beings."
The Time and Timing; Place and Space
Pilot developed and tried out by June in six agencies in 3 states.

Opportunities to consider
- diversity of learning from pilot
- We may need to consider phases (something done by June)
- The possibility to “shine a light” in the same place in different agencies
- Opportunity for inter/intra agency learning
- New lines of communication

Constraints
- Agency size is very different. Will be scoped differently in different agencies
- Getting a coordinated effort going on such a short time frame is dicey
- We need time for other priorities. E.g. end of fiscal year.

Design criteria
The learning process will be successful to the extent that it is...
- Scalable and modular (could be offered with multiple agencies, or for individual agencies).
- Uses data that is already being collected, related to the Futures indicators (rather than aims to increase data collection)
- Adapts to different agencies working in different programs and using different data systems
- Offers choice to agencies (Cafeteria)
- Primarily support intra-agency learning and decision-making but contribute skills and opportunity for inter-agency learning (peer learning)
- Emphasis on learning by doing. Use real work as the principle mechanism for learning.
- Simple and powerful – the smallest thing that would make the biggest difference

Additional insights – important to us
- Influencing up! How can this program support agencies to advocate for the flexibility they need to serve people, while telling a “collective story”
- Silos are not just between programs. They are also between levels within a program (inside the agencies). Silos are also reinforced by funders. “They sit right across the hall from each other! Why can’t they walk across the hall to get that information?”
- How do clients define success for themselves? How do we honor that in our search for outcomes?
- This makes me feel like I am being invested in
• We want directors to be on board, bought in and supportive

What gets built?
• Time-bound learning process – piloted by end of June
• six agencies 3 states
• Process guide and select tools to support taking specific actions
• Plan for learning from pilot and carrying forward beyond pilot

Rolling up our sleeves.
The actions that the learning program will reinforce

How can the program create the opportunity to take these actions during the program (learning by doing)?

- Define and agree on outcomes
- Make outcomes data easily accessible consistently
- Create a structure/platform to sustain sharing
- Platform = tools, templates
- Structure = a plan or routine for sharing
- Staff are sharing info/asking questions and being confident enough to use the data to make adjustments and articulate impact
- Staff interpret data and use it to adjust service
- Staff asking what is missing? As they meet in pairs/teams
- More freedom, less judgement for staff that share their thoughts about data
- Refining data points being collected
- Discussions within staff about data
- Staff are actually collecting data that is qualitative, that enriches the numbers
- Staff are analyzing the data because they are curious about what the data are telling them
- Leadership is having the conversation with staff about the data/info/knowledge to design new fundraising campaigns.

Proposed content: Skills and tools that would support people to take those actions

<table>
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<tr>
<th>Skills</th>
<th>Tools</th>
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<tbody>
<tr>
<td>• Active reflection and listening</td>
<td>• Sample templates for data reports</td>
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<tr>
<td>• Data analysis and reporting techniques</td>
<td>(Excel)</td>
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<tr>
<td>• Facilitation skills (meetings with staff)</td>
<td>• Facilitated meeting guides</td>
</tr>
<tr>
<td>• Presentation skills for sharing the data</td>
<td>• Consistent data presentation method</td>
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<tr>
<td>• Awareness of how outcomes are created</td>
<td>• Defined priorities</td>
</tr>
<tr>
<td>• Data entry and analysis</td>
<td>• Driving questions</td>
</tr>
<tr>
<td>• Integrating data sharing and analysis with</td>
<td>• Rules of Engagement</td>
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<tr>
<td>the whole team</td>
<td>• Staff meeting guides</td>
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<tr>
<td>• Interpretation</td>
<td></td>
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<tr>
<td>• Modeling respect and empowering others to</td>
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<tr>
<td>act</td>
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Conceptualizing the learning program design

Taking all that into account we mapped out a learning program that would work for the learners and their unique situation, adapt to the time and place, support people to take those actions, by offering the skills and tools needed.
An Internal Mechanics View
A Potential “Container”

From Data to Informed Action – a learning approach

<table>
<thead>
<tr>
<th>Facilitated virtual learning, with on-the-job application</th>
<th>Inter-agency workshop: 1.5 day gathering of cohort. Practice</th>
<th>After Action Review: Final virtual gathering to share what we tried how it went and key decisions</th>
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</thead>
<tbody>
<tr>
<td>ACTIONS – week by week. Virtual learning program, Action, reflection over a set of weeks. Virtual space is collective. OTJ application within each agency by 3 person internal team. They choose who/how to engage the “human system” in exploration data relative to features and indicators.</td>
<td>Learners try it out in their own agencies, practice</td>
<td></td>
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Cohort: 3 data stewards per agency, 6 agencies

Tools created to support the process

Facilitator guide Feedback Tool

Technical Assistance

Observations about the potential container:

<table>
<thead>
<tr>
<th>What we like!</th>
<th>Not sure</th>
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<tbody>
<tr>
<td>- Virtual learning can be accessed repeatedly (recorded)</td>
<td>- We need guidance. Willing to do what it takes, but want to know where we go from here</td>
</tr>
<tr>
<td>- Facilitators guide that allows for adaptation in each agency (customization)</td>
<td>- Is there another “go to” when questions arise (besides the facilitator)</td>
</tr>
<tr>
<td>- Training skills are critical</td>
<td>- How the feedback loop will be set up and managed</td>
</tr>
<tr>
<td>- Approach to learning. Learn a bit, take action reflection which promotes a learning centered approach</td>
<td>- What communication protocols should be developed?</td>
</tr>
<tr>
<td>- Cohort and peer to peer support – to stay connected</td>
<td>- Logistics within one office program wide will be difficult start with one program but which one?</td>
</tr>
<tr>
<td>- Inter/intra cohort</td>
<td>- What does TA look like throughout the process?</td>
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- Frequency of contact level of support during contact
- How are we fitting Dina, Meghan, Carol into this process?
- How are we going to address the 13 indicators? Where do they fit?
Appendix: Personas

Dina the Director

About me:

- I am 49 years old and a proud mother of 3 high school aged girls.
- I grew up in Boise, Idaho.
- I studied psychology at Boise State University and received my master in public administration from the University of Idaho.
- I have been working in this position for 8 years and still feel we can always do better.
- I like worldly travel, scuba diving and holding dinner parties with my close friends.

“I know we have our successes. I know we need to improve. The question is how?”

I want:

- The “Big Picture” to be clear.
- Our local legislators and stakeholders to see a quick and easy way to understand an overview of our successes.
- Better tools to show the agency’s outcomes quickly and consistently.
- Effective data flow strategies and best practices to inform agency decisions.
- Impact on every level of the organization.
- Improved communication with funders and stakeholders and legislators.
- Assurance that we are addressing the changing needs of our community members.

Pain points:

- I wish I could see how all our programs are measuring up.
- I have trouble getting information and reports on short notice.
- I know we do great work, but I wish I could see the extent of it over certain periods of time.
- Sometimes I feel like our programs are too disconnected.
- I feel that it would be easier to have one central database to get the information instead of “vinery”.
- Unfortunately, my agency can’t do everything the community needs. There’s not enough resources.
Meghan the Manager

About me:

- I am 35 years old and a proud mother of 2 boys.
- I grew up in Manzanita, Oregon and live in Vancouver, Washington.
- I studied political science at Oregon State University and I am now working on my master in public administration.
- I have been working in this position for only 2 years and still feel there is much to learn.
- I love walking my labradoodle on the beach.

“I don’t need to reinvent the wheel. We should start connecting the dots instead.”

I want:

- A clear picture of how our programs are succeeding and where they need to improve.
- Training programs to help data input staff collect and enter clear and accurate data.
- Data quality tools to help determine outcomes from our outputs.
- A streamlined process that generates reports with simple and easy to understand outcomes.
- Community members to receive the resources they need.
- A transparent relationship with funders so they can understand the needs of our community.
- Improved communication throughout the organization, because quantifiable data should be recognized and understood.
- Programs to start showing their impact internally to inform improvement.

Pain points:

- I’m not sure funding requirement outputs show the “real” need in our community.
- I see too many mistakes in the database that need to be fixed.
- I experience difficulty with knowing outcomes because we just started to collect the data a different way.
- We have too many databases that require inputting the same data.
- I think frontline staff could better understand the importance of data in their work.
- It’s difficult to measure program effectiveness over short and long periods of time.
- I wish we could show the community the extent of our success.
Carol the Caseworker

About me:
- I am 51 years old and live with my husband in a little house surrounded by trees just outside of Spokane.
- I was born and raised in Cheney, Washington.
- I love my work and helping community members in need.
- On Sundays, I wake up early to get groceries at the farmers market and treat myself with a delicious lunch.
- I love to sit by the fire, drink herbal tea, and read.

“I People in need should be seen as human beings.”

I want:
- One single database so I don’t enter the same data multiple times.
- Help to tell me how I pick out the right data from this long narrative.
- The community to understand that everyone struggles sometimes.
- My clients to achieve their goals.
- A picture that shows how many of my clients achieved their goals.
- More time with my client and less time entering data.
- My community members to be connected to the resources they need.
- Management to understand that my clients are all different and have different needs.

Pain points:
- Entering the same data in all those databases is time consuming.
- What is the point in knowing the data entry process if my manager constantly changes the procedure?
- It is hard to follow up with my clients.
- Where does all that data go, anyway?
- I don’t know why I am collecting all this data.
- I’m afraid of benchmarks because it marginalizes the other needs of my clients.
- I don’t know which data is information and which information is data.
- I am too busy to enter that information now because I am dealing with crisis every day.
Six evidence-based Principles for how adults learn

Immediacy
Adults are more engaged when they see the immediate usefulness of what they are learning. If they will be using something very soon, they will work harder to learn it.

Respect
Learning is risky for adults, and they need feel respected in order to take that risk – that their knowledge and experience are acknowledged, and that and using the wealth of experience and knowledge that they bring and presenting content in ways that invite critical analysis, input, and ideas for personal application.

Relevance
Adults must see a reason for learning new content or they will “unhook” and disengage in the learning process. Good teaching connects new content with learners’ daily lives and real needs. Learners will learn faster and more permanently that which is significant to them and their present lives.

Safety
Adults will not learn if the environment feels threatening. The perception of threat can trigger physiological changes in the brain that reduce its capacity for deep thinking. The atmosphere in the room, the design of learning tasks, the way dialogue is structured and facilitated should create a sense of safety, so that adults can take increasing levels of risk with their learning.

Engagement
Adults learn when they are fully and actively engaged in the process of learning, not when they are passive recipients of someone else’s learning. This active engagement involves their intellect, their feelings, and their physical actions. This may be a noisy process (they are talking), a quiet process (they are thinking, or wrestling with it), or an active process (they are searching, practicing, doing).

Inclusion
Adults need to feel included in the learning process, to see that their perspective matters, and to trust that their voice is invited and heard.