# CRAFTING A LEARNING PLAN

## Achieving Strategic Clarity program

### Toolkit materials

This document contains the readings and exercises to support developing a learning plan to refine your organization's intended impact and theory and theory of change draft


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# Introduction

## Note to reader

Dear Nonprofit Leader:

Welcome to the *Crafting a Learning Plan* toolkit! This toolkit is for teams interested in developing a learning plan to answer their priority open questions and ensuring there is a clear roadmap—with activities and owners—for strengthening their draft intended impact and theory of change.

This toolkit has been designed for one individual on the team, who we'll refer to as the "Toolkit Lead." The toolkit will provide guidance on how they can drive the process of crafting a learning plan forward and, at each step, identify potential ways to engage the broader team.

We've designed these materials so that you can either directly print a hard copies or use and share them digitally. The digital version includes links to writable versions (Microsoft Word and PowerPoint) of the exercise templates. To optimize the document for easy printing, some pages were left blank.

At any point, if you have any questions about these toolkits or suggestions on how they can be improved, please reach out to the Bridgespan Coaching team at AcceleratorCoach@bridgespan.org. We value and appreciate your input and are here to help!

We hope you will find this experience to be highly valuable for your team and look forward to hearing from you. All the best as you get started!

Sincerely,

The Bridgespan Leadership Accelerator team

## About this toolkit

Many organizations need to conduct research to address critical open questions related to their intended impact and theory of change. Many also engage in ongoing learning to ensure their intended impact and theory of change remains a living document that is refined as new insights emerge. Planning how you will learn what is needed to answer your priority questions ensures a clear roadmap—with activities and owners—toward strengthening your drafts.

After completing the steps in this toolkit, your team will have designed a learning plan to address the priority open questions identified during the *Achieving Strategic Clarity* program and to ultimately strengthen your intended impact and theory of change.

We will take you through four steps that you can complete either as an individual or with engagement from your team:

- **Step 1:** Revisit your priority open questions from Milestone 5 to ensure your plan is focused on those that are most important to resolve or validate
- **Step 2:** Learn tactics for efficient learning to ensure you're being focused with your time and effort while getting to a good answer
- **Step 3:** Review different learning approaches you could take to answer your priority questions
- **Step 4:** Develop a learning plan with refined questions, targeted learning approaches, owners, and a timeline

At each step, we'll give you guidance on what you need to do, ideas for how you can engage your team, examples of what "good" looks like, and tools and templates to support you in your work. Below is an example of the type of learning plan you might ultimately create:

### Learning plan (example)

KidzXcel

What research activities would you propose to answer your prioritized open questions? In the space below, populate up to three focused activities, their owners, and a proposed timeline for sharing findings with the executive team.

| Question | Activity description | Execution | Owner | Checkpoint(s) |
|---|---|---|---|---|
| • *What do we need to learn?* | • *Describe the type of research needed. What specific activities are in scope?* | • *How will this work be managed?* | • *Who will lead this effort?* | • *What learnings will be shared and when?* |
| • Is there an unmet need for our enrichment program in Catawba County?<br>– Do other providers offer enrichment programs?<br>– If so, do they have waitlists? | • **Provider landscape analysis:** Perform web search to identify local youth development organizations in Catawba County and map offerings against BeWell's programs | • New project, managed by Programs team | • Erica | • Share summary findings including services gaps and distinctions in next month's (July) Quarterly Update meeting. |
| | • **Provider waitlist analysis:** Call the three biggest youth development organizations in Catawba County to determine if they have waitlists for their services (and, if available, how many people are on waitlists) | • New project, managed by Programs team | • Erica | • Share needs estimate in next month's (July) Quarterly Update meeting. |
| • Should we add financial literacy to our holistic enrichment model? | • **Client feedback:** Add question about interest in financial literacy programming to participant exit survey | • Incorporate into existing survey | • Juan | • Share summer cohort survey results in three months (Sept) |
| | • **Expert interviews:** Interview 2-3 experts in enrichment programming to understand importance and need for financial literacy programming, leading models, and curricula for target population | • Ask and follow-up with Board members during standing calls | • Anamika | • Share summary of findings during Monthly Leadership Team meeting in three months (Sept) |

# Step 1: Revisit your priority questions

Developing and executing a learning plan is a significant commitment; you will want to spend your team's valuable time on the areas that matter most. We want to ensure that your plan is focused on the open questions that are most important to resolve or validate for you to feel confident in your intended impact and theory of change. To do this, we ask you to briefly revisit your priority open questions from Milestone 5 of the *Achieving Strategic Clarity* program and to make any necessary updates based on how your context or perspective may have evolved since completing the program.

During the Milestone 5 Team Summit, you defined priority open questions and identified how these might be addressed through already planned efforts or new, targeted, research. If you made good progress on those questions during that discussion and did that exercise recently, this toolkit activity may just be a quick confirmation of where you landed.

As a reminder, there are two main ways to address your prioritized open questions:

- **"Hitching on" learning to work already planned or underway:** If at all possible, we encourage you to take advantage of work that is already underway at your organization and could be adapted to answer a specific open question. This could mean incorporating a new question about your program offering into an existing quarterly client survey, or using a meeting with an external partner to ask about unmet need for certain services in their community.
- **Launching a dedicated research effort:** Some open questions may require launching a specific dedicated research effort. This could mean conducting external research about the need for a service in your community, or interviewing an expert about some element of your program model.

Below are recommended activities that you might complete to refine your learning priorities, building on your progress so far. They include activities for the Toolkit Lead and options on how to engage the broader team (if that makes sense for the organization and context).

| **Step 1 activity: Refine your learning priorities** | |
|---|---|
| **Toolkit lead activity** | **Review** your completed Learning priorities TEMPLATE from the Milestone 5 Team Summit discussion.<br>**Make adjustments** to your list of open questions and learning activities as necessary by reflecting on the following:<br>• Is this question still critically important for us to answer in the near-term to feel confident about our intended impact and theory of change?<br>• Have any new opportunities surfaced to "hitch on" learning to work already planned or underway?<br>**RESOURCE:** Make edits directly to your existing template, or use the blank version provided on the next page to capture updates. For a writable, digital version, click HERE. |
| **Team activity** | *If you would like to engage your team...*<br>Share the refined *Learning priorities TEMPLATE* with the team for review and feedback. This may be particularly valuable in helping you to fully understand the work underway or planned that you might "hitch onto." |

# Learning priorities TEMPLATE

| **Question 1** | |
|---|---|
| What information might be gathered through on-going work? | What type of targeted research might be required to address this question? |

| **Question 2** | |
|---|---|
| What information might be gathered through on-going work? | What type of targeted research might be required to address this question? |

| **Question 3** | |
|---|---|
| What information might be gathered through on-going work? | What type of targeted research might be required to address this question? |

# Step 2: Learn tactics for efficient learning

Across all kinds of learning, it's easy to get overambitious—and there are several places where your instincts can lead to an unfeasible learning plan. The tactics outlined in this step will help you to ensure you're being efficient with your time and effort while still getting to the critical answers you need for your organization. We call this taking a "good enough" approach.

Read the following tips from Leslie or watch the video using the provided link.

**Tips from Leslie for getting to "good enough"** [Click HERE to watch this video]

*One of the most important and useful skills we learn at Bridgespan is how to focus the questions we answer, and research we do to save time. An efficient and effective learning plan gets you the information you need to inform a decision while avoiding investing time to learn information that may be interesting, but in the end does not significantly change your answer. In other words, it's good enough to get the job done.*

*There are two places we urge teams to use their judgment to apply this good enough approach.*

- *First, apply it to the questions themselves. What do you absolutely need to know to make your decision?*
- *Second, apply this principle to the research you conduct. What is the most straightforward and efficient way to get that information you need?*

*The aim here is not to cut corners in the research you do, but to ruthlessly focus your efforts as a team on the issues and tasks that are most impactful. We know this program is not your day job, and well-intentioned teams have stumbled when they set out research plans that are exciting, but too time-consuming to complete.*

*I'll demonstrate this with an example. Consider a youth services provider operating in one large community. As part of this organization's intended impact and theory of change work, it hypothesizes expanding its intended impact to include an adjacent region. The question the team had first prioritized after reviewing their draft was, "what is the current need for our services in the new region?"*

*After discussion, they decided that a good enough version of this question, that would still give them the information they needed to make a decision, was "are there wait lists for similar services among providers already in the region?" This is a great question, because it both speaks to unmet need and makes the data easier to gather.*

*Next, this team set out to develop its learning plan. From their initial idea to gather wait lists from all new providers in the region, they wisely scaled back to a good enough approach. They agreed to first gather the wait list information from the two largest providers, with the rational that if the large providers here have wait lists, there is certainly additional need.*

*It's easy and natural to be a bit overambitious at the start of developing a learning plan and then become overwhelmed when it comes time to execute. We assure you that it is possible to make a great decision, the right decision, with limited—but targeted—information.*

In the next activity, focus on refining your open question to only what is *essential* to inform critical decisions and actions.

<table>
<tr><th colspan="2">Step 2 activity: Focus your open questions</th></tr>
<tr><td>Toolkit lead activity</td><td>Review the questions you prioritized in Step 1 and captured in your updated Learning priorities TEMPLATE. Look for opportunities to simplify and narrow your questions using the “good enough” tactics:<ul><li>What do we absolutely need to know to make our decision?</li><li>Are there aspects of the question we already know the answer to that we can rule out (e.g. questions related to funding support if the new geography is a focus area for our donor base)?</li></ul>Capture refined open questions in the “Good enough” questions TEMPLATE (see next page)<br><br>RESOURCE: Use the template on the next page or click HERE for a writable, digital version.</td></tr>
<tr><td>Team activity</td><td>If you would like to engage your team...<br><br>Share the Step 2 content with your team, including the video link about taking a “good enough” approach and key questions.<br><br>Rather than refining your research plan yourself, divide the work across your team.  Assign each team member a “good enough” question from Step 2 and ask them to complete the above Toolkit Lead activity for that question.</td></tr>
</table>

# “Good enough” questions TEMPLATE

| How might you refine your prioritized open question to only what is essential to inform critical decisions and actions? | |
|---|---|
| **Initial question** | **“Good enough” question** |
| • *Capture question(s) from your Learning priorities TEMPLATE here.* | • *What do we absolutely need to know to make our decision?*<br>• *Are there aspects of the question we already know the answer to, that we can rule out?* |
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# Step 3: Understand learning approaches

Now that you have narrowed the scope of your prioritized questions, our focus shifts to how you will approach research to answer them. In this step, you will learn about several common approaches and outline “good enough” research activities to answer your refined questions.

We’ve outlined four common research approaches and analyses in the table below. Even if you already have some ideas about how to go about the research, we encourage you to skim this content and consider a broader set of options before getting started on the activity.

| **Approach** | **Description** | **You might…** | **Potential watchouts** |
|---|---|---|---|
| *Mine your own data* | Gather and analyze your organization's internal data | • Review the results from different program areas.<br>• Examine those results to see if your programs are working better for some groups, or in some places.<br>• Map out actual resourcing of programs to understand the true cost to deliver activities. | Depending on the type and quality of data your organization already collects, you may need to invest significant time mapping information and collaborating across departments or sites to start gathering data. While the process can be time-consuming, you can't be confident in your answer if you're not confident in your data. |
| *Explore external data* | Analyze external data or review external research | • Review published papers on best practices in your field to understand where your approach could be improved.<br>• Perform a web search to better understand if and how other providers are serving your target population. | Conducting credible research demands trustworthy sources and triangulating from multiple sources when possible. Each organization operates within a specific context, so data from another organization or study may be relevant but not wholly transferable to your own situation. Consider whether you might gain greater confidence by combining analysis with multiple sources. |
| *Have conversations* | Conduct interviews or have discussions with others to understand experiences and perspectives | • Conduct in-depth interviews with program alumni to understand their experience.<br>• Interview staff to gather feedback on potential changes to program model.<br>• Interview experts on trends impacting your target population. | Be respectful of your experts and constituents’ time, and carefully think through the design of the conversation and interviewee follow-up. Be culturally responsive and transparent about goals. Have a follow-up plan in mind since asking for input and not having clear next steps can be detrimental to clients, damage trust, and harm an organization's reputation. |
| *Run experiments* | Test developed concepts or prototypes with target users | • Test the appeal of two new program concepts with existing program participants.<br>• Pilot an altered program format, removing selected activities while reinforcing others. | Carefully consider the stakes for your organization. If you are exploring an unproven or controversial idea, there are ethical implications to "do no harm.” Start by running concept tests with a small group of "friendly users" before expanding your test audience and investing in more robust pilot tests, so you are sure that, even on a very small scale, a pilot program won't have inadvertently harm participants. |

Just as you refined your open questions, there are also opportunities to *focus your research* to make sure you're being efficient with your time. Consider the examples of how a team might focus research activities for each approach in the table below.

| **Approach** | **Initial, unfeasible instinct** | **"Good enough" revision** |
|---|---|---|
| *Mine your own data* | Look at all of your program areas | Look at your biggest program areas |
| | Do a detailed breakout of all cost areas | Do a detailed breakout of the 1–2 largest cost drivers |
| *Explore external data* | Interview/analyze data for everyone | Interview/analyze data for a sample (random or representing different segments) |
| | Research best practices for working with youth | Research best practices relevant to your particular program |
| | Benchmark ten comparable providers | Benchmark the four most important providers based on size, relevance, proximity, etc. |
| *Have conversations* | Research best practices for working with youth | Interview 1–2 experts who can summarize the research on best practices |
| *Run experiments* | Test a curriculum change in all program sites | Test a new curriculum approach in a representative sample of sites |

During the *Achieving Strategic Clarity* program Milestone 5 Team Summit, you and your team agreed to a set of learning priorities and some initial research activities, and captured these in your *Learning priorities TEMPLATE*. In the next activity, you'll review your initial research ideas and focus on suggesting some "good enough" research activities for each of your updated learning questions.

| **Step 3 activity: Focus your research activities** | |
|---|---|
| **Toolkit lead activity** | **Capture** your revised “good enough questions” (from Step 2) in the *“Good enough” research TEMPLATE* (see next page).<br><br>**Review** the initial research activities your team suggested in your *Learning priorities TEMPLATE* during Milestone 5 of the program. If some of these activities map to your new “good enough questions,” then also capture these in the “Initial research plan” column of the *“Good enough” research TEMPLATE*.<br><br>**Review** learning approaches in the above section and **consider** what a “good enough” approach might look like for each question:<br>• Is there information we could gather that is likely indicative of the overall answer to the question (e.g. using wait lists as an indicator of unmet demand)?<br>• Is there information we can gather through existing or planned efforts that might simplify or accelerate this learning?<br><br>**Propose** “good enough” research activities for each question and capture in your template.<br><br>**RESOURCE:** Use the template on the next page or click HERE for a writable, digital version. |
| **Team activity** | *If you would like to engage your team...*<br><br>Share the Step 3 content, the Step 2 completed *“Good enough” questions TEMPLATE* and the updated *Learning priorities TEMPLATE* from Milestone 5 with your team.<br><br>Rather than refining your research plan yourself, divide the work across your team by assigning each team member a “good enough” question from Step 2 and asking them to complete the above Toolkit Lead activity for that question. |

# “Good enough” research TEMPLATE

| How might you refine your initial research plan to only what is essential to inform critical decisions and actions? | | |
|---|---|---|
| **“Good enough” question** | **Initial research plan** | **“Good enough” research plan** |
| • *Capture question(s) from your “Good enough” questions TEMPLATE* | • *Summarize initial research approach from your Learning priorities TEMPLATE* | • *Is there information we could gather that is likely indicative of the overall question we are looking to answer? (e.g. waitlists for demand)*<br>• *Is there information we can gather through existing or planned efforts that might simplify or accelerate this learning?* |
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# Step 4: Develop a “good enough” learning plan

Now it’s time to put what you’ve learned over the past few steps into practice and develop your organization’s “good enough” learning plan. Your learning plan will build on the “good enough” questions and “good enough” research activities you identified in Steps 2 and 3.

For each of your “good enough” questions, we will ask you to think tactically about how you approach conducting this work, including mapping out your approach across a few dimensions for each of your “good enough” questions:

- **Execution:** *How will the work be managed?* If this work will “hitch on” to existing efforts, specifically describe how this integration will take place (e.g. adding a question to an existing survey). If the project is new, describe how the additional workload will be managed (e.g. Operations associate will temporarily take on X work).
- **Owner:** *Who will lead and be accountable for completing the work?* This may be the person actually completing the research or someone managing its completion. Consider both the capabilities and bandwidth of the person you assign. For example, if you're making a busy COO the owner, consider whether an additional co-owner is needed or if it is sufficient to identify someone on the owner’s team who could take on the work.
- **Checkpoints:** *How long will the work take? By what date should the work be completed?* Where possible, map out intermediate checkpoints (e.g. target for interview outreach, target for conducting interviews, and target for synthesis and recommendation) to help you identify if progress is “off-track” early on. For each checkpoint, be clear about what information or update might be shared and by when.

We have provided a blank template for you to use in developing your learning plan. We have also provided an example learning plan from another organization for your reference.

At this stage, it is critical to engage your team. Your team members will most likely be shouldering some of your learning effort. Incorporating their perspective also supports better planning and creates accountability for checkpoints. It is also essential they understand and agree on how this learning will inform refinements to your intended impact and theory of change.

<table>
<tr><th colspan="2">Step 4 activity: Focus your research activities</th></tr>
<tr><td>“Lower touch” team engagement activities</td><td>
Populate the Learning plan TEMPLATE for each of your learning questions. Review the provided guidance for each column (see next pages for template and guidance).
Review your draft a final time, considering a few pressure-testing questions:
<ul>
<li>Where can we simplify our questions?</li>
<li>Can we narrow the scope of our analysis?</li>
<li>Can we “tack onto” ongoing work rather than launching a new effort?</li>
<li>Have we addressed key watchouts relevant to our approach?</li>
</ul>
Share your full draft learning plan with your team for review and feedback during a meeting. Some places you might particularly engage your team:
<ul>
<li>Have we missed any opportunities to streamline or “hitch on” learning to work already underway?</li>
<li>Do the identified owners have the capabilities and capacity to execute this plan? Should additional stakeholders be engaged?</li>
<li>Are the checkpoints at the right time?</li>
</ul>
RESOURCE: Use the template and guidance on the next pages or click HERE for a writable, digital version.
</td></tr>
<tr><td>“Higher touch” team engagement activities</td><td>
If you would like to engage your team...
Share Step 4 content, the Learning plan TEMPLATE (see next pages), and the completed “Good enough” “Good enough” research TEMPLATE from Step 3 with your team.
Assign individuals or teams of two people specific questions to populate the Learning plan TEMPLATE. Remind them to review the provided guidance for each column.
Consolidate your team’s drafts and share with the team
Review and update your draft a final time, considering a few pressure-testing questions:
<ul>
<li>Where can we simplify our questions?</li>
<li>Can we narrow the scope of our analysis?</li>
<li>Have we missed any opportunities to streamline or “hitch on” learning to work already underway?</li>
<li>Do the identified owners have the capabilities and capacity to execute on this plan? Should additional stakeholders be engaged?</li>
<li>Are the checkpoints at the right time?</li>
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RESOURCE: Use the template and guidance on the next pages or click HERE for a writable, digital version.
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# Learning plan TEMPLATE

What research activities would you propose to answer your prioritized open questions? In the space below, populate up to three focused activities, their owners, and a proposed timeline for sharing findings with the executive team.

| Question | Activity description | Execution | Owner | Checkpoint(s) |
|---|---|---|---|---|
| • *What do we need to learn?* | • *Describe the type of research needed. What specific activities are in scope?* | • *How will this work be managed?* | • *Who will lead this effort?* | • *What learnings will be shared and when?* |
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# Learning plan TEMPLATE (guidance)

What research activities would you propose to answer your prioritized open questions? In the space below, populate up to three focused activities, their owners, and a proposed timeline for sharing findings with the executive team.

| Question | Activity description | Execution | Owner | Checkpoint(s) |
|---|---|---|---|---|
| • *What do we need to learn?* | • *Describe the type of research needed. What specific activities are in scope?* | • *How will this work be managed?* | • *Who will lead this effort?* | • *What learnings will be shared and when?* |
| • This should include the "good enough" questions you identified in Step 2.<br>• Remember the decision you are trying to make, and consider whether answers to this question will be sufficient to do so. | • This should capture include the "good enough" research activities you identified in Step 3.<br>• This description should summarize the activities at a high level (e.g. client interviews) as well as offer specifics around the scope of what is expected (e.g. 15 interviews with existing clients).<br>• Consider whether you have addressed key watch outs relevant to your proposed approach | • If this work will "hitch on" to existing efforts, describe how this integration will take place (e.g. adding question to existing survey).<br>• If the project is new, describe how the additional workload will be managed (e.g. Operations associate will temporarily take on X work) | • This person is ultimately accountable for this work. | • Checkpoint description should include:<br>– What will be shared (e.g. data, insights, recommendations, etc.)<br>– Format for sharing (e.g. meeting, report, etc.)<br>– Timing<br>• Where possible, outline immediate actions (e.g. outreach, scheduling) that are needed for support |
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# Learning plan (example)

What research activities would you propose to answer your prioritized open questions? In the space below, populate up to three focused activities, their owners, and a proposed timeline for sharing findings with the executive team.

| Question | Activity description | Execution | Owner | Checkpoint(s) |
|---|---|---|---|---|
| • *What do we need to learn?* | • *Describe the type of research needed. What specific activities are in scope?* | • *How will this work be managed?* | • *Who will lead this effort?* | • *What learnings will be shared and when?* |
| • Is there an unmet need for our enrichment program in Catawba County?<br>– Do other providers offer enrichment programs?<br>– If so, do they have waitlists? | • **Provider landscape analysis:** Perform web search to identify local youth development organizations in Catawba County and map offerings against BeWell's programs | • New project, managed by Programs team | • Erica | • Share summary findings including services gaps and distinctions in next month's (July) Quarterly Update meeting. |
| | • **Provider waitlist analysis:** Call the three biggest youth development organizations in Catawba County to determine if they have waitlists for their services (and, if available, how many people are on waitlists) | • New project, managed by Programs team | • Erica | • Share needs estimate in next month's (July) Quarterly Update meeting. |
| • Should we add financial literacy to our holistic enrichment model? | • **Client feedback:** Add question about interest in financial literacy programming to participant exit survey | • Incorporate into existing survey | • Juan | • Share summer cohort survey results in three months (Sept) |
| | • **Expert interviews:** Interview 2-3 experts in enrichment programming to understand importance and need for financial literacy programming, leading models, and curricula for target population | • Ask and follow-up with Board members during standing calls | • Anamika | • Share summary of findings during Monthly Leadership Team meeting in three months (Sept) |