



Social Impact Consultants

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Developing a Strategic Learning and Evaluation System

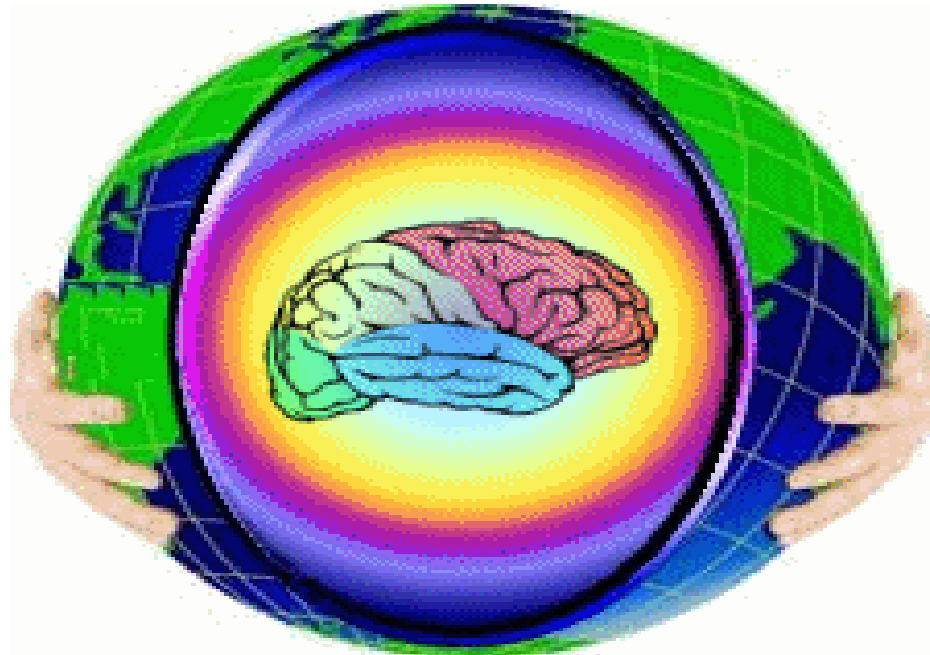
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Seattle, WA

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Thinking About Evaluation Systems

Why might it be a good idea to develop an organization-wide
strategic learning and evaluation system?



Reasons to Develop Strategic Learning and Evaluation Systems

A Strategic Learning and Evaluation System:



Provides a coordinated approach to evaluation



Enhances ability to ask questions that are aligned with the organization's need to make strategic decisions



Increases likelihood of improved results



Facilitates making choices about depth, breadth and scope of evaluation activities



Strengthens individual, group, and organizational learning



Guides efficient and effective allocation of evaluation resources



**Increased
Impact!**

What is a Strategic Learning and Evaluation System?

A Strategic Learning and Evaluation System helps an organization learn from its practices and experiences in ways that inform future actions.

A Strategic Learning and Evaluation System describes...

Why

How

When

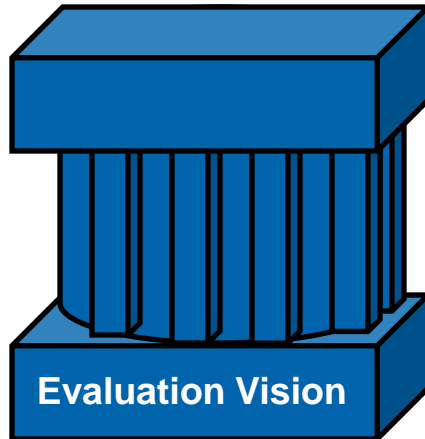
By and with whom

To what extent

...various programs, initiatives, processes, or policies will be evaluated

...and with what resources

The 4 Pillars of a Strategic Learning and Evaluation System



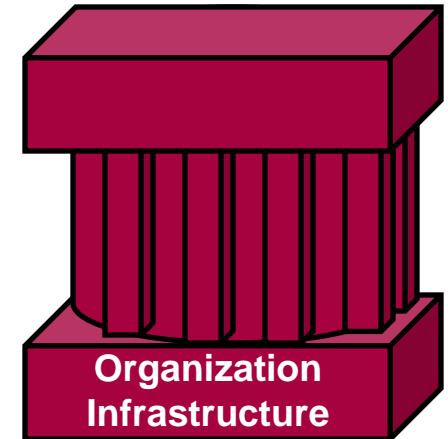
- An overarching, guiding vision
- Suggestions for communicating the vision to relevant stakeholders



- Agreed upon organization strategies
- Systems Map
- Theory of Change
- Outcome maps (organization & program), including custom and/or common indicators
- Strategic evaluation questions



- Assessments of grantee evaluation needs, capacity and reporting processes
- Prioritization of evaluation questions for each year
- Guidelines for when to use internal vs. external staff
- Guidelines for evaluation designs and methods
- Samples/suggestions regarding communicating and reporting



- Suggestions for:
 - Building a learning culture
 - Leadership role
 - Staffing and capacity building
 - Evaluation budget
 - IT and knowledge management
 - Marketing/communications
 - Implementation timelines

Conditions that Support a Strategic Learning and Evaluation System

Knowledge and Experience with Evaluation

- Positive disposition towards evaluation and the use of findings
- Open-mindedness about evaluation approaches and methods
- Willingness to learning from and about evaluation

Staffing/ Resources

- Availability of staff to manage and lead evaluation processes
- Some level of evaluation knowledge and skills among staff (evaluation capacity)
- Understanding that evaluation is part of everyone's job
- Budget line item for evaluation (across the organization)

Articulated Strategy and Goals

- Clearly articulated organizational strategy and goals that are understood and agreed upon by staff and the Board
- Alignment of initiatives, grants, programs, with the organization's strategy(ies)

Organizational Culture

- Leaders provide clear and consistent support for evaluation and the use of findings for decision making and action
- Organizational learning culture is desired and supported by staff
- Staff readily share information and learning with each other

The more these conditions are met, the greater the chances the Strategic Learning and Evaluation System will be used effectively

Benefits of Strategic Learning and Evaluation Systems

A Strategic Learning and Evaluation System:

- Provides greater confidence that evaluations are **asking the right questions at the right time**
- Improves use of evaluation findings due to greater **alignment with program and organization strategies**
- Ensures evaluations are **sized rightly** (depth, breadth and scope); evaluations are designed to provide credible, relevant, and useful information
- Communicates commitment to **ongoing learning**
- **Provides a coordinated and intentional approach;** eliminates one-off and ad hoc evaluations - increases **effective** and **efficient** use of **evaluation resources**

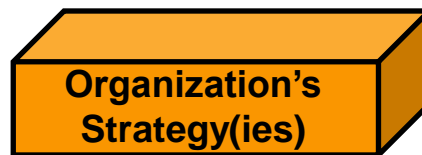


Reflection Question

As you think about the 4 pillars that comprise a strategic learning and evaluation system, **which do you think would be hardest to implement in your organization?**



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