



CBSL 2020-21

*Capacity Building for
Strategic Learning*

Capacity Building for Strategic Learning: Findings from the Pilot Cohort

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Overview of the Capacity Building for Strategic Learning Pilot Initiative

Context

From May 2020 to September 2021, Mathematica and Catalyst:Ed partnered with the Bill & Melinda Gates Foundation and a set of nine K–12 education grantees for the [Capacity Building for Strategic Learning \(CBSL\) pilot initiative](#).

The partnership defined equity-centered strategic learning as the set of efforts that enables organizations to set goals that contribute to increased educational equity for Black and Latino students and students experiencing poverty; establish hypotheses on how to reach their goals; build strong organizational culture, practices and systems that support implementing and testing those hypotheses; and use information to improve their model on an ongoing basis. Critically, the partnership believes that strong equity-centered strategic learning is demonstrated when equity is considered in not only the organization’s goal but also in its learning and decision-making approach. The initiative’s goal was to strengthen grantee capacity for equity-centered strategic learning by helping grantees scope projects in their area of need, matching grantees with providers that could help build organizational capacity, delivering cohort learning activities, and offering thought partnership.

Vision and goals

The initiative's vision was to (1) provide grantees with learning support and tools to build their capacity for equity-centered strategic learning and (2) generate evidence to investigate whether capacity building for equity-centered strategic learning matters and whether funders can provide effective support in that space.

The initiative aimed to...

1. Increase participating grantees' strategic learning capacity
2. Use strategic learning to more deeply embed equity into organizations' goals, learning, and decisions
3. Learn what works to address grantees' strategic learning needs

**Strategic
learning defined**

The set of efforts that enables organizations to set goals; establish hypotheses on how to reach their goals; build strong organizational culture, practices and systems; and use information to improve their model on an ongoing basis

Initiative workstreams



Scoping and Matching

- Catalyst:Ed adapted its capacity framework to articulate the key capacities needed for strategic learning, facilitated self-reflection activities with the grantees, developed project scopes for capacity building, and matched grantees with providers that would execute the scope of work
- Grantees receive resources to initiate project with provider support



Grantee Support

- Mathematica, the intermediary, led monthly check-ins with each grantee to gauge progress on work with the provider, support grantees, and learn about the grantee experience



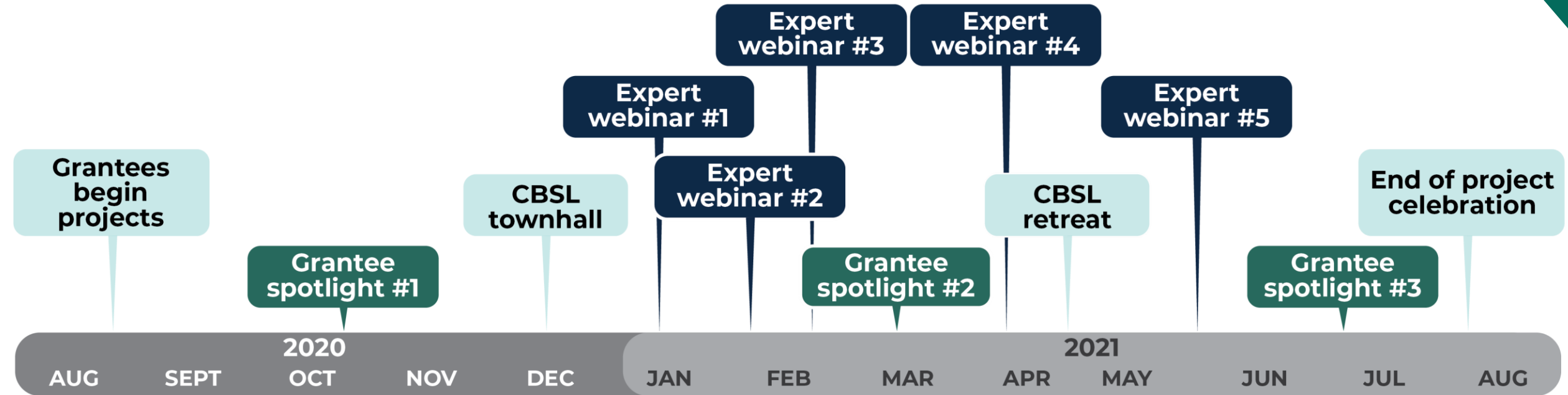
Learning Activities

- Mathematica and partners offered learning activities to aid grantee capacity building
- Activities included webinars, peer-to-peer collaboration, and resource sharing

Grantee cohort



Timeline for the initiative



Ongoing monthly grantee check-in calls







See Appendix slide 34 for more detail on each activity

The CBSL initiative's theory of change

PROBLEM STATEMENT: There is not sufficient support for improving organizations' capacity for equity-centered strategic learning that will help them better achieve their goals.

VISION: We believe that the Capacity Building for Strategic Learning (CBSL) initiative can help provide grantees with learning support and tools to build capacity for equity-centered strategic learning and generate evidence to investigate the argument that capacity building for equity-centered strategic learning matters and that funders can provide effective support in that space.

Activities <i>If we invest in...</i>	 Outputs <i>We'll see resulting...</i>	 Proximate Outcomes <i>Leading to short-term changes...</i>	 Outcomes <i>Leading to medium-term changes...</i>	 Impact <i>Ultimately impacting...</i>
1. Building grantee capacity in equity-centered strategic learning: Scope equity-centered strategic learning projects, match grantees with a provider, and provide advisory support during project implementation	<ul style="list-style-type: none"> • Provider-grantee relationships • Grantee-intermediary thought partnership • Time and space for grantee to reflect and improve equity-centered strategic learning • Project-specific output 	<ul style="list-style-type: none"> • Grantees <u>apply</u> new skills and/or knowledge to their work • Grantees <u>grow their desire</u> for equity-centered strategic learning 	<ul style="list-style-type: none"> • Grantees <u>prioritize equity-centered strategic learning</u> practices • Grantees <u>build an equity-lens</u> into organization's goals, learning, and decision making • Grantees can better <u>advocate for strategic learning support</u> 	<p>By improving service delivery and strengthening continuous learning and improvement, grantees are better able to equitably improve student outcomes through their work.</p>
2. Conducting learning activities: Form learning cohort and conduct learning activities focused on equity-centered strategic learning	<ul style="list-style-type: none"> • Cohort learning community • Informal peer relationships • Repository of learning resources on equity-centered strategic learning topics 	<ul style="list-style-type: none"> • Funders understand <u>how and why to support</u> capacity building in strategic learning 	<ul style="list-style-type: none"> • Funders <u>prioritize CBSL initiatives</u> 	
3. Learning about CBSL model: Collect and analyze data on grantee experience with the CBSL initiative model	<ul style="list-style-type: none"> • Analysis of CBSL model • Presentations and reports 			

CBSL HYPOTHESES:

- 1a. There is a disconnect between what grantees would authentically like to learn about and what they are learning in order to report to funders.
- 1b. Funders can provide grantees the space and resources to sustainably build an equity lens further into the fabric of their organization's goals, learning, and decision making.
2. Funders can effectively support capacity building by offering funding and cohort time, engaging an intermediary, and trusting that the grantee knows what they need better than the funder does.
3. If we create peer learning activities that are engaging and responsive to needs, then grantees will be better equipped to improve equity-centered strategic learning.

Findings from the initiative

Sources of information for the findings

The findings came from an analysis of pilot grantees' experience. Sources include:

- Monthly one-on-one 45-minute semi-structured check-in calls with grantee staff from August 2020 through August 2021
- Regular grantee feedback surveys, such as evaluation forms after learning events
- Group discussions over the year of the initiative, such as during the CBSL retreat
- Self-reflection data gathered by Catalyst:Ed

Findings
organized into the
four domains of
learning in the
theory of change

Organizational
strategic learning

Centering equity
in strategic
learning work

Participating in
learning activities

Receiving
Capacity-
building support

Strategic learning

Mathematica...

Provides evidence
for

the public and
private

or...

**Grantees
perceive
mismatch
between funder
and grantee
learning needs
and priorities**

Requirements differ by funder and by grantee

- Some grantees feel like their funders value their relational, systemic, and non-quantifiable work
- Others feel student outcomes, such as test scores, drive conversations with funders

Most grantees appreciate when funders are interested in process learnings, qualitative data on their impact, and narrative-based reporting

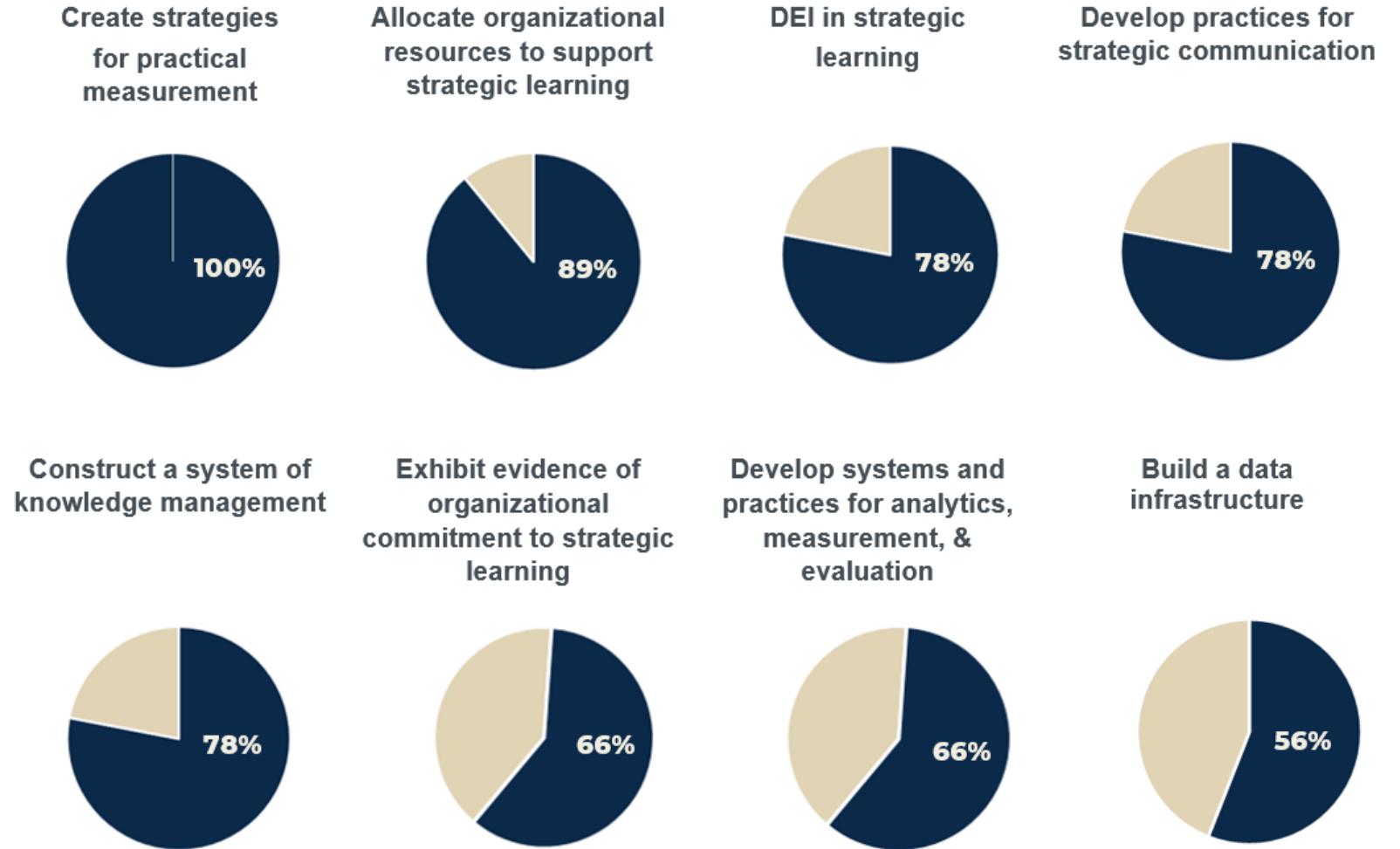
- Grantees want more funding for learning and for non-quantifiable activities around system's change

CBSL funding allows grantees to explore other metrics and construct theories of change that suit their organization's activities and goals

"We were funded to do certain work, not to learn internally."

What strategic learning challenges did the grantee cohort face at the outset?

Percentage of grantees that identified each capacity as an area for growth



Source: Catalyst:Ed-facilitated self-reflection activity for grantees.

What supports did grantees seek to address these challenges?

Scope Summaries

Develop mixed-method, culturally responsive **measurement tools** to assess the impact of their programs, train staff on the new tools, and implement continuous improvement practices.

Develop **network health metrics** that have an equity lens to identify if their network having an impact in the most efficient and effective way.

Provide strategy coaching to **measure and understand the impact of their work**. Identify if/which pilots should continue, expand, or end.

Embed equity-focused knowledge management and continuous improvement processes into the fabric of how the organization works.

Develop and implement a **rapid-cycle testing and practical measurements**.

Assess data infrastructure and interoperability and help design a new system.

Develop **measurable theory of change**, create deep technical metrics, and build a culture that utilizes data routines.

Embed equity work and language into the fabric of their organization.

Develop a long-term strategic plan that includes identifying key benchmarks to monitor progress that can guide individual program redesign and gap analyses to identify additional program workstreams.

Grantees found barriers and opportunities around investing in strategic learning

Key barrier was grantee staff time and capacity

- This has been worsened by the COVID-19 pandemic

Opportunity: Connectedness between CBSL work with other grantee initiatives and projects, which could improve impact of funding

- It is helpful when CBSL work and other workstreams reinforce one another
- Recognizing co-dependencies and synergies between strategic learning and strategic planning efforts might support sustainability

Opportunity: Engage staff in strategic learning to generate buy-in and embed equity organization-wide

- This may help embed equity by engaging diverse voices from throughout their organization
- Four grantees have strategic learning committees, task forces, or working groups

Centering equity

Mathematica...

provides evidence
for

the public and
private

or...

How was equity represented in grantee project scope?

Grantees showed a range of implicit and explicit focus on equity, diversity, and/or anti-racism in their scopes of work

- Some saw their commitment adequately represented by their target outcomes, population served, and product offerings
- Others saw their commitment necessitating change in internal organizational practices, policies, and culture

Equity considerations and perceived expectations from funders were part of the provider selection process for many grantees

- This raised the question of how do we—as funders, grantees, and intermediaries—interrogate who we view as "expert" providers?

DEI strategy, organizational strategy, and strategic learning work together

- Grantees avoided siloed conversations on equity, strategic learning, and organizational strategy

How did grantees center equity during their projects?

Grantees demonstrated a strong commitment to equity in improving strategic learning. Examples include:

- Developing a multi-year anti-racism plan
- Revisiting old survey instruments to make them more accessible and culturally responsive
- Creating shared definitions of equity
- Embedding equity in mission statements, external language, and internal strategic plans

Some concerns remain about:

- Buy-in or consensus from other internal staff, who have competing priorities and time constraints
- Varying buy-in on equity principles, language, and practice from funders and school partners

“Equity work shouldn’t live in a special project team. An equity lens needs to be embedded in everything.”

Learning activities

Mathematica...

provides evidence
for

the public and
private

or...

Grantees participated in several types of learning activities throughout the pilot initiative



Grantee Spotlights

Grantees contributed to a peer learning community by sharing challenges, successes, and practices in a given area of work. Grantees not presenting learned from their peers so that they could adapt what they learned for their organizations. The topics from the three spotlights, which each had three presenters, were:

- **Equity-Centered Approaches to Strategic Learning**
- **Equity in Data Collection and Interpretation**
- **Lessons Learned – Equity in Strategic Learning**



Expert Webinars

Grantees learned from optional webinars presented by subject matter experts on how to integrate equity into the fabric of their organization, as well as other relevant strategic learning-focused topics.



Capacity Building in Strategic Learning Retreat

Grantees came together virtually to take a deep dive into how to incorporate equity into the fabric of their organizations, hear from experts, workshop parts of their projects, and build relationships with their peers.



Town Hall

Grantees had an opportunity to anonymously submit questions for representatives from the Bill & Melinda Gates Foundation, Catalyst:Ed, and Mathematica to respond to. The goal of this event was to provide a space for grantees get their questions answered and facilitate dialogue between those leading, organizing, and implementing the project and the grantees.



End-of-Project Celebration

Project leaders from the Bill & Melinda Gates Foundation, Catalyst:Ed, and Mathematica will share some closing remarks and encouragements. Grantees will briefly share their successes, lessons learned, next steps, and plans to sustain their work moving forward.

Learning cohorts
can facilitate
meaningful
connections
between grantees

Relationships and trust grew among grantees and between grantees and the intermediary

- Still, some grantees found it difficult to gain momentum to build relationships when meetings happen infrequently, are virtual, and leave limited space for casual and organic interactions

Peer cohort fostered solidarity and shared experience, which grantees value

Grantees sought opportunities for peer-to-peer exchange and problem solving around problems of practice

- Grantees were interested in brainstorming with peers with similar challenges and with ones who have expertise in those areas
- Grantees valued lessons from organizations that faced similar challenges and identified solutions, to avoid “re-inventing the wheel”
- Several grantees connected regularly with each other outside of structured time

“It resonated that we’re experiencing similar challenges with multiple kinds of reinvention going on at the same time.”

Organizations want to learn and problem solve in small groups

Group discussions and breakout rooms are where substantial learning and relationship building occurred

- Breakout rooms fostered productive discussions on shared problems of practice
- Grantees valued breakout rooms for tangible “application” of the topics discussed in learning activities
- Many grantees would have preferred more time for hearing about what their peers have been doing in this initiative and more generally

Grantees initially expressed weariness about participating in cohorts because of prior experiences with generalized learning that was not specific to their work

- From this, it is important that learning activities are specific and useful to the grantees’ work

“[We were] hungry for concrete questions like ‘What did you figure out?’ or ‘How do you know if you're actually dismantling white supremacy culture?’”

Capacity building

Mathematica...

Provides evidence
for policy

the public and
private

Intermediary role and approach are appreciated

Grantees valued the role of intermediary, played by Mathematica, with scoping and matching support from Catalyst:Ed

- An intermediary between Gates and grantees helped keep things moving, created community, and prompted reflection
- Scoping projects with the intermediary was helpful and spurred meaningful retrospection for each organization
- Many grantees appreciated the expertise of their providers, while others identified mismatches between their needs, their scope, and their provider's expertise

Honest, transparent, peer-to-peer tone enhanced the relationship among grantees, intermediary, and funder

- Emphasis on mutual learning makes the engagement about shaping the initiative together in a way that is driven by grantee needs
- Pre-existing power dynamics, such as competitions for funding, can disrupt cohort activities
- Grantees appreciate when power dynamics between funder, intermediary, provider, and grantee are acknowledged

Grantees
identified
foundational
elements for
strategic learning
practice

Some grantees observed that the first step to doing strategic learning well is having a theory of change

- This can help align expectations, create shared definitions, and generate buy-in with leadership and programmatic staff

“There is no such thing as strategic learning unless there is a clear set of goals towards desired outcomes and strategies. [Nothing] is learned unless one has a framework.

There is a need for establishing the baseline equation or logic model to begin to pressure test that logic model.”

What would grantees change about the initiative if repeated?

Intermediary should set expectations about the initiative early on

- Set expectations around level of effort and how many staff should be involved
- Share information about the types of providers available

Intermediary, funder, and grantee could reconsider the allocation of time

- Allow time for several grantee staff members to get involved with scoping and provider selection
- Hold space for a “pre-project” for the grantee and intermediary to figure out what the grantees’ perceived problems are and what guidance to give the provider

Grantees would have appreciated more guidance on scoping and working with providers

- Grantees reflected on the level of focus in their scope; several wondered if it should have been narrower
- Some grantees would have liked advice on guiding and managing their providers

Find out more

[CBSL Initiative webpage](#)

[Recommendations for Funders from the CBSL Initiative](#)

[Capacity Building Toolkit](#)

[Learning Cohort Toolkit](#)

Questions?

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Appendix

Grantees participated in several types of learning activities

Grantee Spotlights



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Equity-Centered Approaches to Strategic Learning	Equity in Data Collection and Interpretation	Lessons Learned—Equity in Strategic Learning
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<u>Engage R+D</u>	Inclusive Virtual Facilitation
	Lean Data Approaches
	Asset-Based Research
Catalyst:Ed + Panelists	Practical Measurement in Continuous Improvement
	Knowledge Management



Town Hall

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<u>Datassist</u>	Equity-focused session that built upon the We All Count full-day equity workshop
Mathematica	Working session on initiative findings
	Capacity Building Problems of Practice
Catalyst:Ed	Reflections on Capacity Assessments
<u>Crocus</u>	Equity-Centered Data Visualization
Bill & Melinda Gates Foundation, Mathematica, and Catalyst:Ed	Office hours
	Town hall



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