The Developmental Evaluation Toolkit
# STRATEGIC LEARNING DEBRIEF PROTOCOL

The Strategic Learning Debrief is a facilitated meeting that brings data collection and analysis together with intuitive learning in the context of a Theory of Change. Specifically, the Strategic Learning Debrief is an opportunity to:

- Explore what strategies were completed during a pre-defined time period;
- Review what you have learned about the outcomes/preconditions you are hoping to influence; and
- Discuss the relationship between strategies and outcomes/preconditions.

The Strategic Learning Debrief should result in:

- Strategic decision-making to guide the next six month's activities; and
- Revisions to the Theory of Change and/or developmental evaluation learning activities.
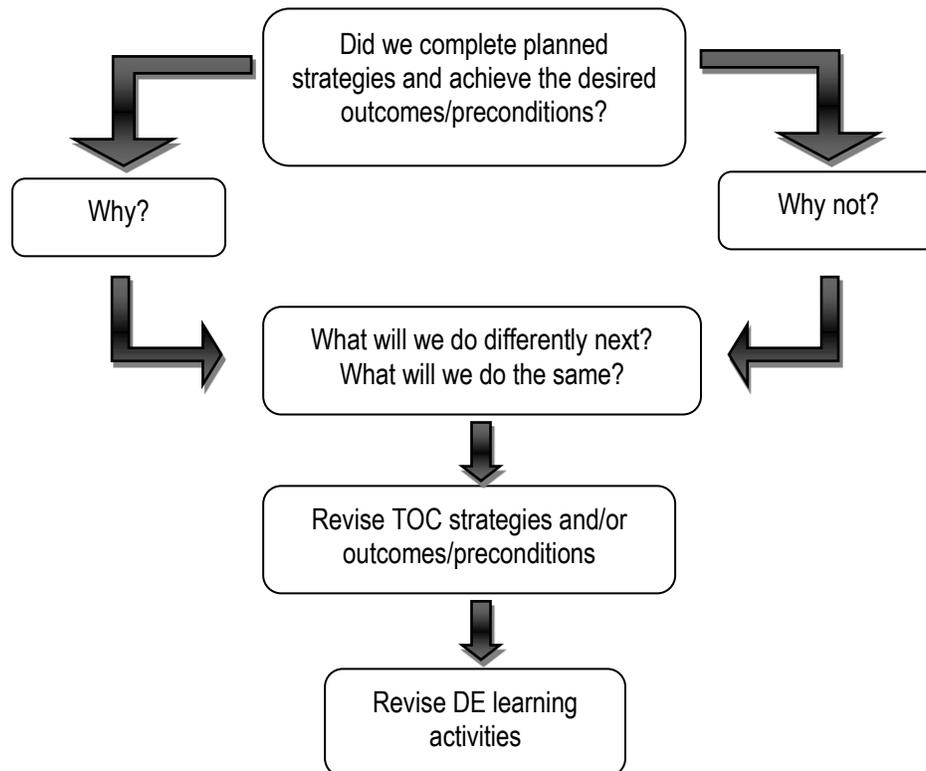
Are you interested in more tips and tools for developmental evaluation?

Spark Policy Institute's (www.sparkpolicy.com) interactive Developmental Evaluation Toolkit is available at www.sparkpolicy.com/DEtoolkit. Please join us share your stories about developmental evaluation, share your tools, and access the tools and ideas from other evaluators.

**Implementing the Debrief:** The Strategic Learning Debrief requires thoughtful preparation to be successful. The developmental evaluator should take all of the information collected that is relevant to the time period being explored and summarize it in a way that is easily presented to others. Visual presentation of the summarized information is very helpful. If other key stakeholders have their own data they have been collecting, they should be encouraged to share it as well. This may include their tracking of activities or participation of others, etc.

The debrief is typically a two to three hour meeting with key stakeholders who are invested in the initiative or project. The meeting should have both a facilitator and a note-taker. Ideally, the facilitator is someone both familiar with the project and involved in compiling the data for use during the Strategic Learning Debrief. It can be the developmental evaluator, but does not need to be. The note-taker should be someone who does not need to participate in the content of the meeting.

At the debrief, the facilitator is responsible for helping the participants to review and discuss the strategies and outcomes/preconditions accomplished. The discussion should explore the extent to which the project completed the desired strategies and achieved the desired preconditions. Before the debrief ends, the participants should identify lessons learned from the previous reporting period and make strategic decisions for the next reporting period, including changes to the Theory of Change, developmental evaluation learning questions and tools, and strategies moving forward.

**Using the Information:** At the end of the Strategic Learning Debrief, two documents should be generated, at minimum, for use by project staff as they move forward:

- The summarized learning used during the meeting inclusive of action items identified during the discussion; and
- Meeting minutes that include all of the discussion from the meeting.

These documents should be used thoughtfully to change the Theory of Change, project strategies, and any of the developmental evaluation learning tools that need updating. The documents should also be saved for review by the developmental evaluator, so the long-term strategy of the project remains part of the ongoing planning that happens during the Strategic Learning Debriefs.

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STRATEGIC LEARNING DEBRIEF FACILITATION PROTOCOL

Theory of Change Activities

- *Introduction*
    - o Walk through the planned strategies, according to the Theory of Change.
    - o Present the results of any learning tools related to the strategies completed (e.g. tracking, counts on #s of participants, etc.). Ask others to present their information as well.
- *Discussion Questions*
    - o Were we able to complete the activities within our Theory of Change that were planned in the last six months?
    - o What activities did we not complete that were part of our Theory of Change? Why did we decide to do these activities?

Theory of Change Outcomes/Preconditions

- *Introduction*
    - o Walk through the desired outcomes/preconditions, according to the Theory of Change.
    - o Present the results of any learning tools related to the outcomes/preconditions (e.g. meeting evaluations, observations, analytics on the website, etc.). Ask others to present their information as well.
- *Discussion Questions*
    - o Did we accomplish our outcomes/preconditions in our Theory of Change as a result of our activities? What contributed to these successes?
    - o What did we learn about outcomes/preconditions we did not accomplish as a result of our activities? What were the barriers?

Changes to Our Strategies and Preconditions

- *Discussion Questions*
    - o Are there any preconditions that we believe we cannot achieve? If so, do we need to revise our strategies or revise our expectations of the preconditions we can accomplish?
    - o What do we want to do differently in the future and why? What does it look like to make these changes?
    - o What do we want to sustain and continue with minimal changes?
    - o What does this mean for our Theory of Change? What changes will we make?
- *Conclusion*
    - o Prior to moving to the next step, make sure there is agreement on a set of specific changes to the Theory of Change (if needed).

Changes to Our Strategic Learning

- *Discussion Questions*
    - o Did today's discussion generate any new areas of uncertainty?
    - o Was there any information missing today that would have been helpful?
    - o Should we answer a new question through our developmental evaluation? If so, what is the question we want to answer?
    - o Should we include any new data collection in the developmental evaluation? If so, how?
- *Conclusion*
    - o Prior to ending the meeting, make sure there is agreement on a set of specific changes to the developmental evaluation questions or data collection (if needed).