Making Thinking Visible for Emergent Strategy and Aligned Action

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Case Study

In November 2021, executive leaders at StriveTogether were putting the finishing touches on our annual planning process: finalizing strategies, tactics and resource allocation plans for the coming year. With two years left in an ambitious five-year strategic plan – and progress in communities stalled by the compounding effects of the COVID-19 pandemic, we were feeling a sense of urgency to accelerate partnership progress and demonstrate measurable results in service of better and more equitable cradle-to-career outcomes.

Part One: What Will It Take to Drive Aligned Action for Equitable Outcomes?

StriveTogether is a national movement with a clear purpose: helping every child succeed in school and in life from cradle to career, regardless of race, ethnicity, zip code or circumstance. In partnership with nearly 70 communities across the country, teams of leaders across sectors work upstream to dismantle the cycle of inequitable outcomes. We use data and activate communities to redesign systems to shift policies, practices, resources and power structures so that Black, Indigenous, Latine and Asian youth and families and those experiencing poverty thrive – putting people on sustainable pathways to upward economic mobility.

Over the last decade, StriveTogether has supported local communities across the Cradle to Career Network to build and sustain the civic infrastructure required to mobilize communities around a shared vision, use relevant local data and work with youth and families furthest from opportunity to make better decisions in order to change systems and advance better and more equitable cradle-to-career outcomes. Systems are big and complex, but people make decisions that impact systems everyday. So, we coach leaders to shift how they approach their role to activate changes in systems and influence others to do so as well. Continually evolving with lessons from network members, the StriveTogether Theory of Action™ supports communities with a guiding framework and progressive milestones along the path to better and more equitable results.

Annually, partnerships self-assess progress along the Theory of Action by participating in the Civic Infrastructure Assessment, an opportunity where partnerships submit qualitative and quantitative data on their work and progress over the last year. StriveTogether assesses partnership progress and makes recommendations for what partnerships should prioritize in their work in the year ahead to accelerate progress toward equitable cradle-to-career outcomes (e.g., activate a diverse group of youth and partners to co-develop strategies; build on momentum from pre-k advocacy efforts to pursue additional policy advocacy priorities). Themes from the data are shared with the network every spring, and the data is also used internally to guide Network strategy.

EXPLORING · EMERGING · SUSTAINING · SYSTEMS CHANGE · SYSTEMS TRANSFORMATION

LEADS TO EQUITABLE OUTCOMES

Partners align to change educational practices through collaborative improvement, institutional policy change, and civic infrastructure development

Partnerships organize to transform multiple systems through policy and other structural changes

Children and families experience improved cradle-to-career outcomes and sustained pathways for economic mobility

We were working towards a 2023 target of having 23 communities working in the *Systems Change or Systems Transformation gateways*, the most advanced stage of partnership development. At the end of 2021, the Cradle to Career Network included 68 cradle-to-career partnerships in nearly 30 states, impacting over 12 million young people, including 6.5+ million youth of color. Across the network, 19 partnerships were operating in the Systems Change gateway, 37 partnerships were operating in the Sustaining gateway, and 12 partnerships were operating in the Emerging gateway (for more details on the gateways, take a look at the Theory of Action™). Each partnership is its own independent entity based on the local context, and partnerships join the Cradle to Career Network to access opportunities to accelerate their work.

> **In Systems Transformation communities,** the civic infrastructure exists where all Black, Indigenous, Latine and Asian youth and families and those experiencing poverty have the opportunity to reach their fullest potential, from cradle to career.
>
> This is a result of partnership with system leaders in making fundamental and institutionalized shifts in policies, practices, resources and power structures to eliminate structural racism and advance equitable outcomes.

StriveTogether had a team of 40+ people, mostly in Cincinnati or Chicago, with half a dozen flexplace employees in other cities across the US. Our impact strategy included an array of Network offerings including executive coaching, convenings and network events, learning and evaluation, policy and advocacy, and grantmaking through a trust-based philanthropy approach. We've adopted a targeted universalism approach in how we prioritized strategies to individualize support for partnerships based on their contexts.

To develop our 2022 organizational strategies, the team had undergone an annual planning process that began with a review of Civic Infrastructure Assessment data and global insights from trends in partnership progress and feedback on Network offerings. Our strategy development process started with aligning on four priority factors, the key levers to accelerate partnership progress: (1) using data, (2) changing policies, (3) shifting power, and (4) supporting long-term partnership sustainability. With two years left to accelerate partnership progress to Systems Change and Systems Transformation, we were prioritizing Network offerings targeting the leading edge of the Cradle to Career Network while still supporting a healthy pipeline of earlier-stage communities.

The COVID-19 pandemic had unmasked and worsened long-standing inequities in the communities that comprise the StriveTogether Cradle to Career Network. Across diverse contexts of partnerships with our Network, common themes emerged regarding the disruptions and anticipated long-term impacts of COVID-19 on the livelihoods of children and families, including learning loss, mental health, the digital divide, childcare gaps, food insecurity and more. The pandemic required an initial triage approach to our service delivery and transitioned our immediate focus from systems transformation to stabilization and sustainability. As we move forward toward an equitable recovery, our north star has become even clearer: to dramatically improve outcomes at scale, we need to redesign systems that don't work for youth and families of color and those experiencing poverty. To do so, we faced two key questions:

1) What will it take to match the right mix of Network offerings to what partners need to accelerate their progress toward Systems Transformation; and

2) How might StriveTogether team members nimbly and effectively adjust planned tactics in light of new data from partnerships, especially with teams dispersed across multiple office locations?

Part Two:
Mobilizing Teams to Shared Line of Sight and Emergent Strategy

These questions were top of mind at an Executive Leadership Team retreat in November 2021, the first time the eight senior enterprise-wide leaders at StriveTogether gathered in-person since early 2020. We were energized and leaned into tough conversations about organizational strategy and structure, working to set direction, allocate resources, monitor progress and tend to organizational culture.

During a brainstorming discussion about strengthening team culture to live into the organization's core values, I proposed a new idea: what if we set aside an entire week to require the team to slow down and reflect together – to focus on the "Study" part of the Plan-Do-Study-Act (PDSA) cycle that is core to the collaborative improvement approach that we preach? Culture data had shown time and again how team members felt stretched and over-capacity, navigating competing commitments and struggling to prioritize. A sync week of sorts, this could be an opportunity for people to pause and do important work together to get aligned so that team members could ultimately work smarter, not harder - addressing a common problem in the social sector. Members of the executive leadership team were intrigued and supportive of the idea, agreeing to support me in making this a priority for team members when the time came. Partnership Progress Deep Dive Week was born.

Two months later, dozens of team members gathered for quick virtual sessions centered around each of our 68 cradle-to-career partnerships. Anyone in the organization could gather and share their learning about each partnership, reflect on each partnership's strengths and challenges, and align on a line of sight for the priority work ahead for each partnership – what would most unlock progress toward transformed systems and equitable outcomes, from kindergarten readiness through high school graduation, postsecondary completion and employment?

Each day of the week focused on a group of partnerships at a similar stage of development and/or geography: Monday covered all Emerging partnerships, Tuesday, Wednesday and part of Thursday covered all Sustaining partnerships, and the rest of the week covered all Systems Change partnerships. We created a schedule of 68 mini-sessions (20- or 25-minute Zoom meetings with 10 min breaks in between), and people who had information to share or wanted to learn signed up to join sessions throughout the week. The sessions were intentionally brief to illuminate quick thinking and gut reactions about the data we had available. The majority of all 45 team members across the organization joined at least two sessions throughout the week, with some team members attending many more. Each session had 4-10 people participating, with a facilitator keeping the discussion on track, and a notetaker documenting notes on an internal Salesforce platform for access to everyone afterward.

> **Deep Dive Week Agenda:**
> 10 min: Share strengths and opportunities
> 10 min: Discuss/align on line of sight
> 5 min: Brainstorm relevant Network offerings

Part of what was unique about Partnership Progress Deep Dive Week was the intentionality of bringing people with deep experience with and connection to each partnership and inviting team members who are further away from direct contact with partnerships to bring fresh perspectives and a beginner's mindset to the same conversation.

I specifically invited operations-focused team members in the organization to join and bring fresh perspective and curious questions to the group — their engagement helped deepen the richness of our insights.

Historically, internal strategy development processes had been grounded in global insights about the macro-level data about all 68 partnerships. To supplement these global insights

— to pursue a more emergent strategy — Partnership Progress Deep Dive Week pushed our team to complement the macro and the micro, creating the foundation for personalized and targeted strategies for each partnership. Grounded in a clear line of sight for each individual partnership, we were able to match partnerships with the right combination and dosage of relevant Network offerings to enable each partnership to make progress along their line of sight towards better and more equitable outcomes. For example, one partnership's line of sight was "Create formal structures for youth and families to make decisions around shifts to policies, practices, and resources" which led to targeted invitations to participate in Network events focused on co-developing solutions with youth and families.

A week after Partnership Progress Deep Dive Week, the Network strategy leadership team — called the Pipeline Braintrust — gathered to make meaning of the data and insights we had gathered. The group identified themes disaggregated by Gateway (the stage of progress along the Theory of Action) and also uncovered gaps in Network offerings. This sparked an emergent strategy approach where we used the data and insights

from Partnership Progress Deep Dive Week to develop hypotheses and test opportunities to shift and adjust 2022 tactics and strategies across programmatic areas of executive coaching, convenings and network events, grantmaking, learning and data, and policy and advocacy. For example, succession planning was a theme that recurred in multiple Deep Dive Week conversations, but we didn't have any Network offerings focused on this topic; afterwards, we decided to identify an external partner to create a new set of offerings in this area targeted to the specific group of partnerships with this need. In addition to creating new, responsive offerings, the insights helped the team bolster and focus existing Network offerings to ensure a clearer focus on the themes that emerged from the line of sight data.

The synthesized insights and line of sight data from Partnership Progress Deep Dive Week have now become a touchstone for how StriveTogether team members work with partnerships. The line of sight guides interactions with partnerships and helps everyone stay focused on a common, personalized target for each partnership – keeping a relentless focus on what key moves will most accelerate *this* partnership's progress to Systems Transformation and more equitable outcomes.

Part Three:
Emergent Learning Reflections

Overall, this experience felt like a powerful way to nimbly use emergent learning tools and frameworks to support organizational strategy. I was guided by the idea of grounding everyone in a shared line of sight – and creating the spaciousness for the team to take the time needed to make thinking visible to one another, grounded in context-specific data, to enable and accelerate partnership progress.

We talk about the importance of de-fuzzifying fuzzy language, especially when creating a line of sight. By pushing for more individualized insights rather than relying on global data alone, we were able to come up with stronger, more nuanced hypotheses and opportunities that truly meet the moment of what partnerships across the Cradle to

Career Network need, rather than generalizing to evergreen platitudes.

This was fundamentally about making thinking visible – working to create a container to make it easy for people to share the knowledge in their heads as well as the data traditionally gathered through the Civic Infrastructure Assessment. Rather than feeling constrained by the explicit structure of an Emergent Learning Table, the opportunity created space for a flexible emergent learning container without people feeling performative about bringing the "right" data and coming up with the "right" insights. Rather than taking place in one room or in one meeting with the same group of people, this emergent learning process took place over several days with different groups of people involved at different stages based on their role and contribution to the

results at stake. Everyone across the organization was invited to bring their Data and Insights. Then, the smaller group responsible for the strategy, design and implementation of Network offerings completed the Hypotheses and Opportunities as part of the Emergent Learning table, focused on: what meaning are we making of all these insights? What do we want to do about it? What will we take action on now?

By leveling the playing field and inviting people to bring their curiosities and insights, regardless of their role, the resulting insights were strengthened by the diverse perspectives that contributed to the conversations. It also created a memorable moment or ritual for the team, creating the collective pause – the space for the team to slow down and create something together. It helped create more shared ownership and shared accountability for supporting the progress of our partners and also helped people see a stronger connection in how their individual work contributes up to overall organizational goals. By valuing different expertise of people across the organization, it also supported the type of anti-racist and values-driven culture we're working to build — one that celebrates community and progress. Working to dismantle the common pathology of program versus operations in the nonprofit sector, the level playing field of making thinking visible through emergent learning created the container for people who aren't typically in conversation with one another to truly see and hear the wisdom of their colleagues in a new way – contributing to creating a stronger culture of belonging for team members.

Looking ahead to reprising this process a year from now, I plan to explore what it will take to co-create and co-develop the line of sight outside of our organizational boundaries with our partnership leaders so that we can collectively share accountability for shared goals, learning and impact for each partnership moving forward. Additionally, these headline lines of sight are not static, so we need to test opportunities to make visible how the line of sight changes over time based on progress partnerships make during the year.

I'm energized by the opportunity to use emergent learning as a flexible set of skills to guide teams to do our real work in service of better and more equitable outcomes.