

The Learning Block Workbook

is a practical tool that can be used individually or with a team to help social service organizations strengthen their programs with learning blocks – short, structured periods of testing, data collection, and reflection that support continual improvement alongside day-to-day service delivery.

A learning block is a time-limited process in which teams identify a focal issue, try out a small approach to addressing that issue, examine data, and refine their approach based on what they learn.

This workbook walks you through the following activities:



Part 1: Determine your approach.

Identify a pressing challenge, explore its root causes, and clarify what success would look like through short- and longer-term outcomes.

Part 2: Develop a measurement plan.

Determine how you will track progress using quantitative data, qualitative data, or both.



Part 3: Outline next steps.

Create a concrete action plan with roles, timelines, and milestones for implementation and data review.

The workbook can be completed in one sitting or over the course of multiple meetings. The sections build on one another, but are flexible and can be revisited as your learning block unfolds.

Part 1: Determine your approach.

Do you have a programmatic challenge or issue that you would like to focus on? This part of the workbook will walk you through the process of picking a challenge and outlining a way to address it:

Step 1: Identify your focal issue.

Step 2: Dive deeper into the focal issue.

Step 3: Create a vision statement.

Step 4: Brainstorm potential approaches.

Step 5: Select your priorities.

Step 6: Consider “if,” “then,” and “as a result.”



1

Identify your focal issue.

Choose an issue for your first learning block that is

- ✓ within your sphere of influence,
- ✓ possible to address within three months (or fewer),
- ✓ related to the needs and experiences of the people your program serves,
- ✓ specific (you cannot fix everything in these short blocks!), and
- ✓ measurable, which will allow you to assess your progress and success.

Describe your focal issue here.

2

Dive deeper into the focal issue.

Fill in the chart below.

example
↓

Questions to Consider	Your Answer
Who is most affected by the focal issue? How are they affected?	One-half of participants who enrolled are not completing the certification program and cannot obtain related jobs.
Why is this issue occurring? Try this: Ask “Why?” five times to understand the root cause.	<ol style="list-style-type: none"> Why are they not completing the program? → <i>Because they are missing classes and falling behind.</i> Why are they missing classes? → <i>Because they have trouble balancing the program with work or family responsibilities.</i> Why is it hard to balance the program with other responsibilities? → <i>Because the program schedule is rigid and does not offer flexibility.</i> Why is the program schedule inflexible? → <i>Because all sessions meet in person during the day, and there are no remote or evening options.</i> Why are there only in-person, daytime sessions? → <i>Because the program has not yet adapted to the scheduling needs of adult learners.</i>

Questions to Consider	Your Answer
Who is most affected by the issue? How are they affected?	
Why is this issue occurring? Try this: Ask “Why?” five times to understand the root cause.	<ol style="list-style-type: none"> Why... Why... Why... Why... Why...

3

Create a vision statement.

After digging into your focal issue, envision the future you want to create.

example
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Young adults in our certification program have flexible, easily available learning options that fit into their lives, allowing them to fully participate, stay on track, and successfully complete the program.

Enter your vision statement here.





Brainstorm potential approaches.

What solutions or approaches might address your focal issue? Generate as many ideas as you can — all ideas are welcome at this stage, no matter how big, small, or outside the box. Do not worry about feasibility yet — this exercise is about exploring possibilities.

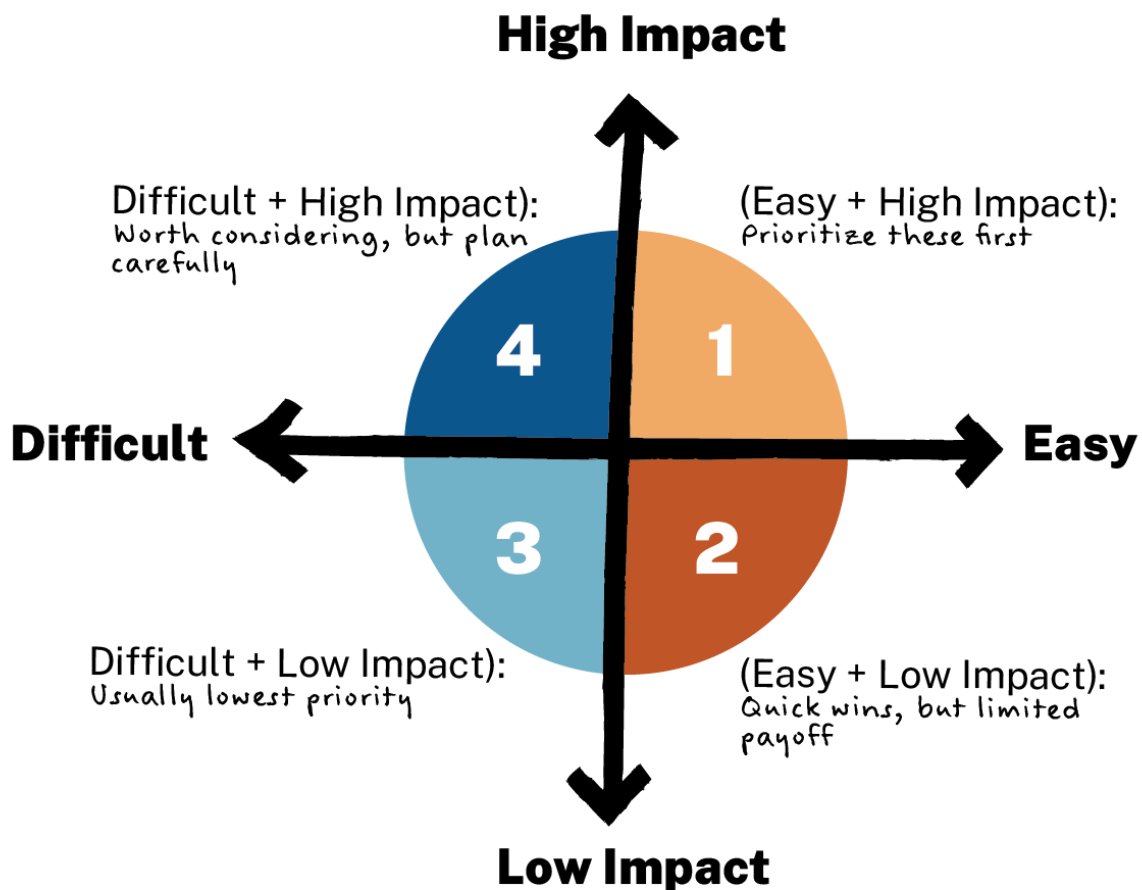


Select your priorities.

Now that you have brainstormed a range of possible approaches to the focal issue, use this tool to decide which one(s) to focus on first. This activity will help you identify which ideas to advance, which need more planning, and which may not be worth pursuing right now.

The ease-impact matrix helps you weigh each idea based on two questions:

- How easy or difficult would it be to implement?
- How much impact could it have if successful?



6

Consider “if,” “then,” and “as a result.”

Think about what you will do, what will happen right away, and what changes you hope to see — all leading toward your bigger vision.

example

If we create an evening learning option and offer one-on-one check-ins for students who miss class, then more students will be able to (1) attend training sessions regularly, (2) catch up when they miss a session, and (3) feel supported. As a result, more young adults will complete the certification program, even if their schedules or responsibilities change.



If...

What specific actions will you take over the next three months?

1. _____
2. _____
3. _____



Then...

What will happen right away? Describe the short-term, direct results of your actions.

1. _____
2. _____
3. _____



As a result...

What longer-term outcome do you hope to see?

1. _____

Remember: Ensure your “as a result” response connects back to your larger vision. That is the bigger change you are working toward, even if it takes time to achieve.

Part 2: Develop a measurement plan.

You have identified a focal issue, some approaches to address it, and the outcome you hope to see as a result. This section will help you determine how to measure whether your approaches lead to your intended outcome.



Step 1: What kind of data will you use?



Step 2: Make a measurement plan.

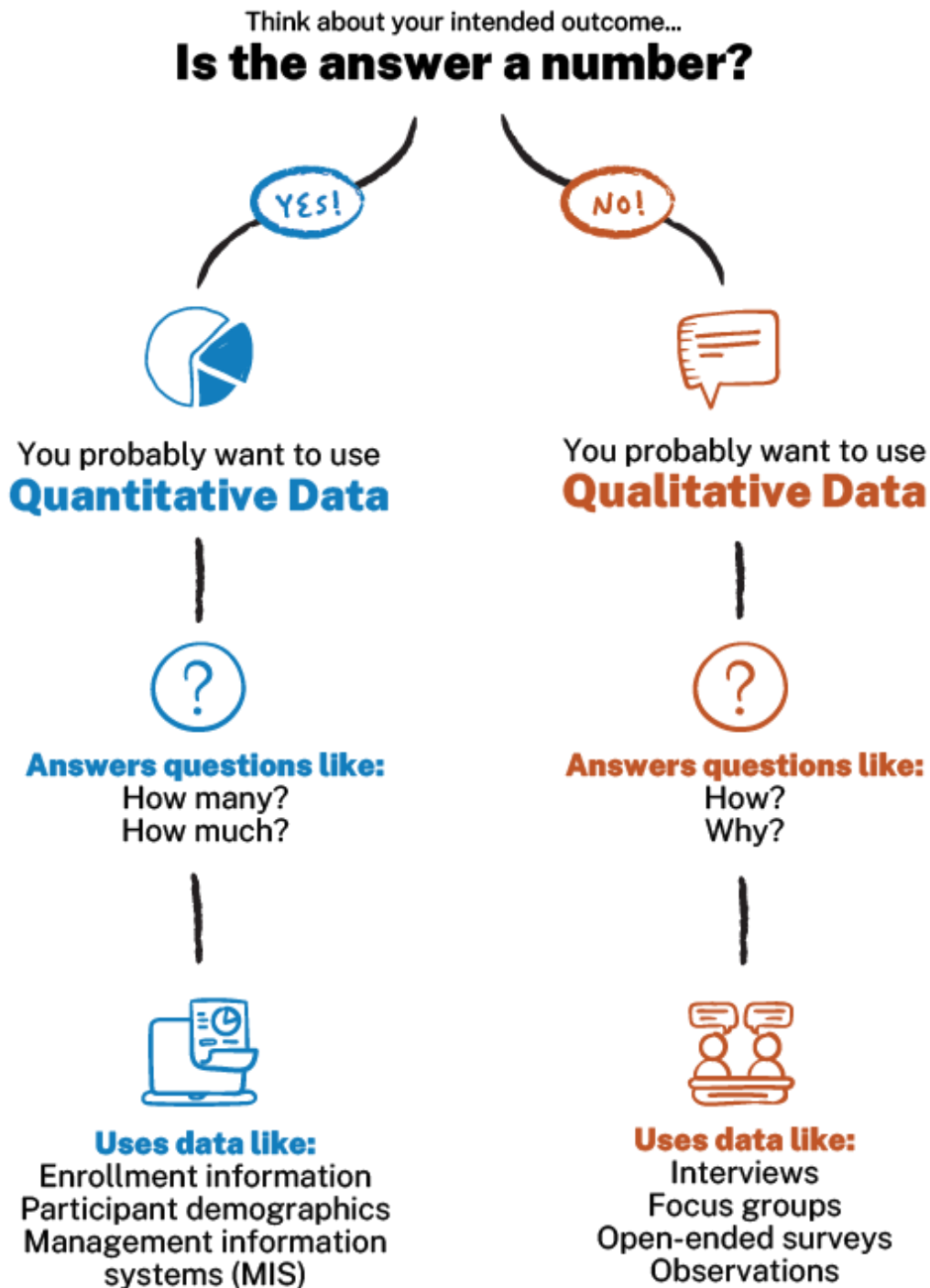


What kind of data will you use?

Your measurement plan will look different depending on the kinds of questions you want to answer. First, remind yourself of your intended outcome from **Step 6 of Determine Your Approach**.

Intended Outcome

Next, use the flow chart below to determine if you will use quantitative or qualitative methods to measure whether you achieve that outcome. Then jump to either **Step 2a**  on page 11 of this workbook (for quantitative methods) or **Step 2b**  on page 13 (for qualitative methods).



What if I want to use both qualitative and quantitative data?

Qualitative and quantitative methods of gathering data can complement each other! You can use both in your learning block. Today, you will probably only have time to dig into one method, so start with the one that best fits your approach.

Here are some ways to use qualitative and quantitative methods together:

- **Learn about what is going on and why it might be happening.** For example, use enrollment data to understand how many participants enrolled in the program and conduct focus groups to learn about why they decided to sign up.
- **Explore an idea, then test your hypothesis quantitatively.** For example, you could interview people to learn about what helps them find a job and use that information to develop and assess a program change that you test quantitatively.
- **Interpret and make sense of findings.** Consider speaking with people to understand what might be contributing to a quantitative finding. For example, if you see that one case worker has higher employment placement rates than others, you might interview all the case workers to identify differences in how they approach their work. Doing so could help you identify promising approaches that all staff members could try.





2a

Make a measurement plan using quantitative data.

Now you will set a numerical goal related to your intended outcome and identify data sources to monitor progress toward that goal.

Set a goal.

What number, rate, or percentage do you expect to see? Make sure your goal is reasonable based on your organization's recent trends and circumstances.

Certification completion among young people who are enrolled in the program increases from 50 percent to 70 percent.

example
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For your outcome, what is your numeric goal?



Identify your data source.

Next, consider your data source. Do you already collect related information? Use sources that produce countable, consistent information — such as enrollment counts, attendance records, or service participation. Avoid sources like case notes, which are narrative and difficult to summarize or track over time.

If you currently do not collect data, plan how to start — for example, by adding fields to your management information system (MIS) or creating a spreadsheet for key points in time (for example, enrollment or job placement dates).

Do you have existing information to measure your goal? If so, what is it?	If not, how will you track data to measure your goal?

If you're not using qualitative data, skip to **Part 3: Outline Next Steps** on page 19.



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Make a measurement plan using qualitative data.

If you would like to understand why or how something happens, it may be helpful to use qualitative methods. Qualitative data can help you

- assess how and why something occurs, identify pain points, and identify potential solutions to challenges;
- understand staff members’ or participants’ experiences, perceptions, or feelings;
- identify specific perspectives on whether an approach is successful;
- add context or explain why quantitative findings are occurring.

Identify whom you will learn from.

Qualitative data reflect people’s perceptions and experiences, so the composition of your group will shape what you learn. Be purposeful about whom you invite to participate and consider which perspectives may be missing. Decide whether your question calls for a mix of experiences or a specific group; speaking with multiple groups can provide a more complete understanding of your focal issue.



Program Participants

Program stage. New, current, and former participants offer different information – new participants on enrollment, former participants on postprogram outcomes.

Background. The experiences of participants (for example, involvement in the justice system, parenting) shape their perspectives.

Participation in services. Compare information from people who had nonlinear paths through the program with information from those who completed the program without major challenges.



Program Staff Members and Partners

Tenure. A person’s level of experience can shape the challenges they encounter, the strategies they use, and the relationships they build in their work.

Role. It is usually helpful to talk to people who are directly involved with your topic of interest. Speaking with their collaborators or other associated people who have different roles can provide additional information and perspectives.



To whom will you talk?	What characteristics, backgrounds, and perspectives do you want people to bring to the discussion?	How will you find or identify people who have these characteristics?



Determine what methods you will use.

Qualitative methods include interviews, focus groups, observations, and open-ended surveys. These methods all have different strengths and things to consider.

Common Qualitative Methods



In a **semistructured interview**, the interviewer uses a predetermined set of questions but can adapt them to explore emerging topics that are important to the interviewee. It allows researchers to gather similar information from all interviewees while also tailoring the interview to each respondent.

- Use this method when you want to go deep into individual experiences and thoughts and understand processes in detail.
- Balance information about individual experiences with other data to gain a more holistic view of the program.



Observations are notes you take while watching an activity. You might write about the number of people participating, the activity's content and structure, participants' engagement in the activity, or relationships between participants.

- Use this method when you want to see how something works for yourself or gather background information.
- Consider *participant* observations: Take part in the activity and reflect on the experience. For example, a supervisor may enter case notes for a day to understand challenges with the MIS.



An **open-ended survey** provides a structured way to collect the same information from a group of people.

- Use this method when you want to let people answer privately or on their own time.
- There are fewer opportunities to learn about specific experiences or ask follow-up questions.
- You can ask quantifiable survey questions (for example, "How many mandatory training sessions were you able to attend?").



A **focus group** is a facilitated discussion that explores group opinions and experiences. It is useful for identifying points of convergence and divergence among a group of people or ideas.

- Use this method when you want to assess opinions and reactions from several people at once and have people react to each other's ideas and experiences.
- It is harder to collect detailed information.
- It works well with four to six people.



What do you hope to learn about?	What method will you use?	How many people will you speak with?



Plan the logistics.

Planning the logistics will set you up for successful data collection.

Where will activities be held? Is there a quiet or private space where people can share personal information? How long will the activities take?

Because qualitative data collection requires respondents to share their time and their perspectives, it is common to thank people for their participation with gift cards, food, or other incentives. What incentives will you offer?



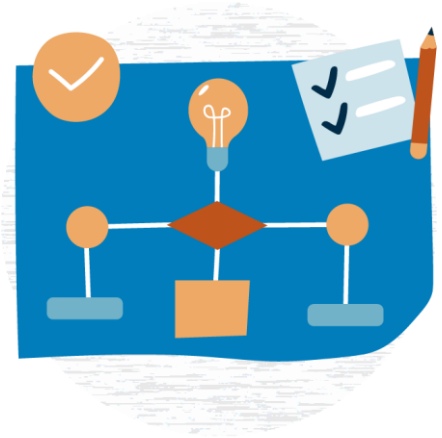
What will you talk about? Start drafting some questions here.
Time goes quickly – plan for 10 questions that you can really dig into.

A large, empty rectangular box with a dashed border, intended for drafting questions.



Part 3: Outline next steps.

You have an approach and you have identified data that will describe progress toward your intended outcome at the end of the learning block. How are you going to put your approach into action? Who will be involved? When will all this happen, and how will you monitor your progress along the way?



- Step 1:** Identify your team.
- Step 2:** Pick your time frame.
- Step 3:** Determine your tasks and create a work plan.

1

Identify your team.

What leader or stakeholder buy-in is necessary before starting?

Who will be the primary person responsible for managing this learning block? This person should have eyes on all things related to implementation and assessment along the way.

Who will be involved in putting the approach into action?
Put names and specific roles here.

Who will collect data and use the data to monitor progress?
Put names and specific roles here.

2

Pick your time frame.

Most learning blocks can be accomplished in short spurts – two to three months – allowing for iterative assessment and new learning blocks.

Please define your learning block start and end dates here:

Start date: _____

End date: _____





Determine your tasks and create a work plan.

A work plan can look a lot of different ways. Here is a template to get you started. This tool should be used iteratively throughout the learning block: Keep it updated, add tasks or subtasks, and use it to keep everything on track.

Tasks	People Responsible	Start Date	End Date	Status
Implementation				
What are the steps for implementing your approach?				

