DISCOVER, PLAN, DO, LEARN

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In Illinois, many families near or from priority populations don't enroll their children in early learning programs.

Often, they face many obstacles such as language and/or cultural barriers, financial challenges, transportation issues, work schedules or simply have a misunderstanding of the early learning enrollment process or unaware of the benefits of early learning for their children.

This guide will help you understand the fundamentals of learning by doing: conducting small experiments, learning from what happens, making changes based on what you've learned, then doing it all over again.

This cycle is called Action Learning and it can help you consistently learn to improve your work, whether you are engaging families directly or working with your community partners to reach families of young children.

SMALL STEPS = BIG WINS

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What is Action Learning?

Action Learning is an outcomes-oriented improvement process that uses data to identify needs, match solutions, plan, evaluate and reflect using a series of small, iterative experimental cycles.

With Action Learning, you will: discover, plan, do, learn and repeat the process until you reach the goal you are working toward.

Using this approach, you strive to reach your goals by implementing small changes along the way, and making adaptations based on what you **learn by doing**.

A big part of the process is using data and user experiences. Using this approach, you work towards your vision.

What is Action Learning?

Solutions are about simplicity.

A lot of people think big problems are solved with big, complex solutions.

The opposite is true.

Big problems are solved by a series of small solutions.

What is Action Learning?

Let's have a look at the foundation for using action learning to achieve community-focused goals:

- The Scientific Method
- Toyota's Improvement Kata

Then we'll put it all together and show you how to use the process in your work:

- Universal Problem Solving Model

THE SCIENTIFIC METHOD

The Scientific Method is at the heart of Action Learning because it teaches us step-by-step how to create a plan for doing experiments:

1. Make an observation: look at data to identify the vision or challenge.
2. Form a hypothesis: state the results you expect will result from your experiment.
3. Perform the experiment: collect data.
4. Analyze the data: review the results, what have you learned?
5. Report the findings: recommend changes to the experiment based on what you learn from the results.
6. Invite others to do the experiment, as well.

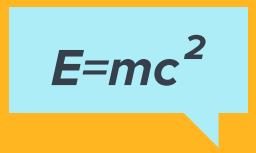
The Scientific Method

STEP 1

Make an observation.

STEP 2

Form a hypothesis.



STEP 3

Perform the experiment.

STEP 4

Analyze the data.

STEP 5

Report the findings.

STEP 6

Invite others to reproduce the results.

THE SCIENTIFIC METHOD

EXAMPLE

Joe wants to work with the Community Health Center (CHC) to increase referrals to his early childhood education program. Using a Scientific Method approach would look like this:

1. Identify the challenge or vision: Joe's early childhood program does not receive referrals from CHC at this time.
2. What results does he expect: Joe expects to receive three referrals a month.
3. For his experiment, Joe has provided the CHC staff with a script they can use when talking to patients who are parents/caregivers of children under five years old. The CHC staff use Joe's script for one month.
4. At the end of one month, Joe reviews the results of the experiment and finds that he received two referrals from the CHC, rather than the three he hoped for.
5. Joe reports the results back to his team.
6. Joe shares what he did with his peers in early childhood education, encouraging them to use a script to get referrals from their partners.

… and that is the end…

Building on the Scientific Method to create a process for Action Learning.

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IMPROVEMENT KATA

Improvement Kata is a practice of continuous action learning. The model uses the basic steps of the Scientific Method, but doesn't end once you have results.

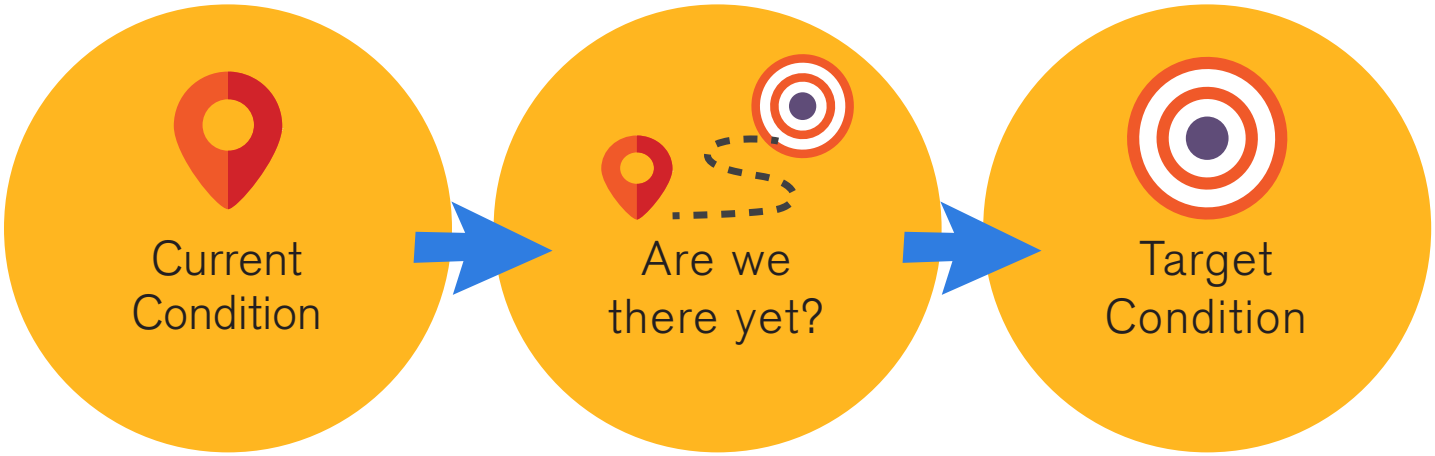
It is an ongoing practice that seeks to identify and remove many small obstacles while working to attain an aspirational vision.

Improvement Kata is a routine for moving from the current situation to a new situation in a creative, directed, meaningful and **iterative way**. In other words, you: Do, Learn, Adapt and Repeat.

There are four steps:

1. Determine a vision or a direction: the vision should describe what your community system will attain in an ideal state.
2. Understand the current condition: what is the situation now?
3. Define the next target condition (next step): the target condition describes the next achievable step in the Action Learning process.
4. Move toward target condition: conduct an experiment, learn from the results, adapt and repeat by returning to Step 2.

Improvement Kata

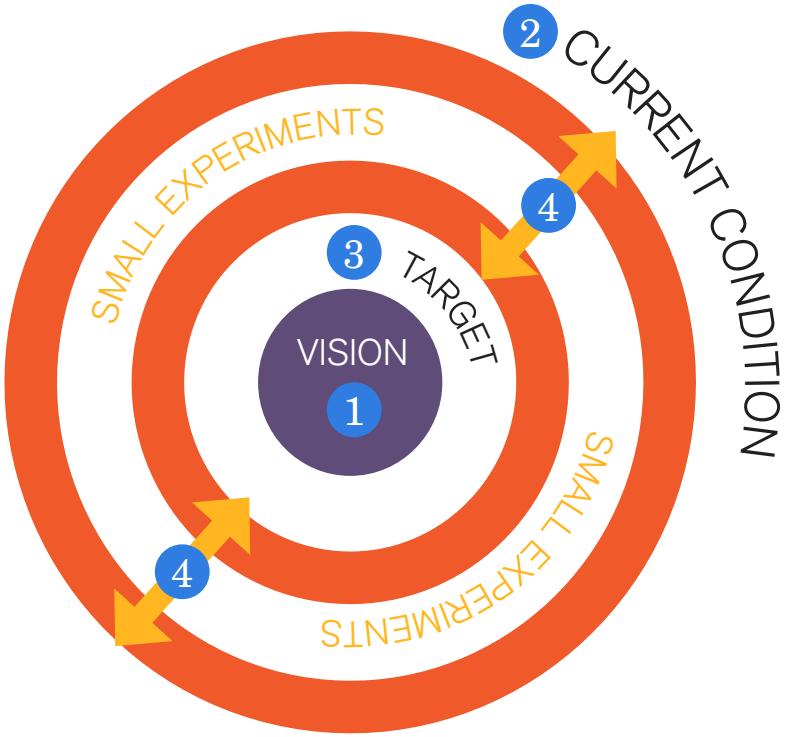


- Ask how things work now?
- What is the current process?

- Test a series of very small experiments to help achieve your vision.

- There can be many target conditions on the path to the your vision. Target conditions can be changed or modified as you move along.
- A target condition is important because it provides a clear, focused path toward progress.
- It describes a process operating the way it should to achieve your vision.

The Four Steps of The Improvement Kata



1. Identify your Vision.
2. Grasp the Current Condition.
3. Establish your Next Target Condition.
4. Conduct Small Experiments to get there. (plan, do, check, act)

IMPROVEMENT KATA

EXAMPLE

Joe wants to work with the Community Health Center (CHC) to increase referrals to his early childhood education program. One way he can help reach this vision is by using an Improvement Kata approach that would look like this:

Experiment 1:

1. Determine a vision or a direction: Joe wants more referrals from the CHC.
2. Understand the current condition: Currently, the CHC makes only sporadic referrals.
3. Define the next target condition: the CHC uses a script provided by Joe to speak with parents/caregivers and this increases referrals to three per month.
4. Move toward target condition: For one month, the CHC uses Joe's script. At the end of the month, only two referrals have been made. **HERE is where action learning takes place: Joe adjusts the approach and repeats the experiment by returning to Step 2.**

Experiment 2:

1. Reflect on the vision or direction.
2. Understand the current condition: the CHC refers two families per month.
3. Make a "who will do what, how often, using what tool?" statement.
4. Move toward the target condition: in addition to the script the CHC is already using, Joe provides the staff with information cards with contact information to provide to families, making it easier for them to contact him.

And so on and so on.... Joe will keep doing an experiment again and again until he has achieved his vision.

Putting it all together!

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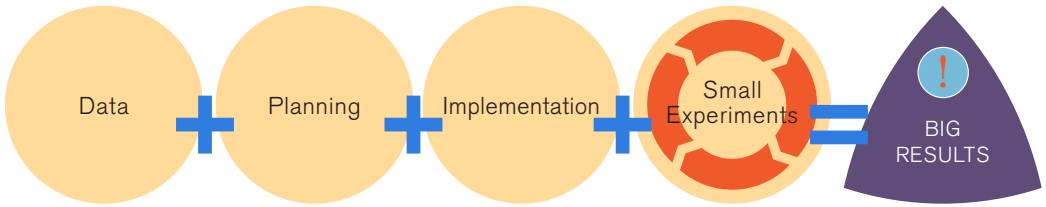
SYSTEMS CHANGE

Universal Problem Solving Model

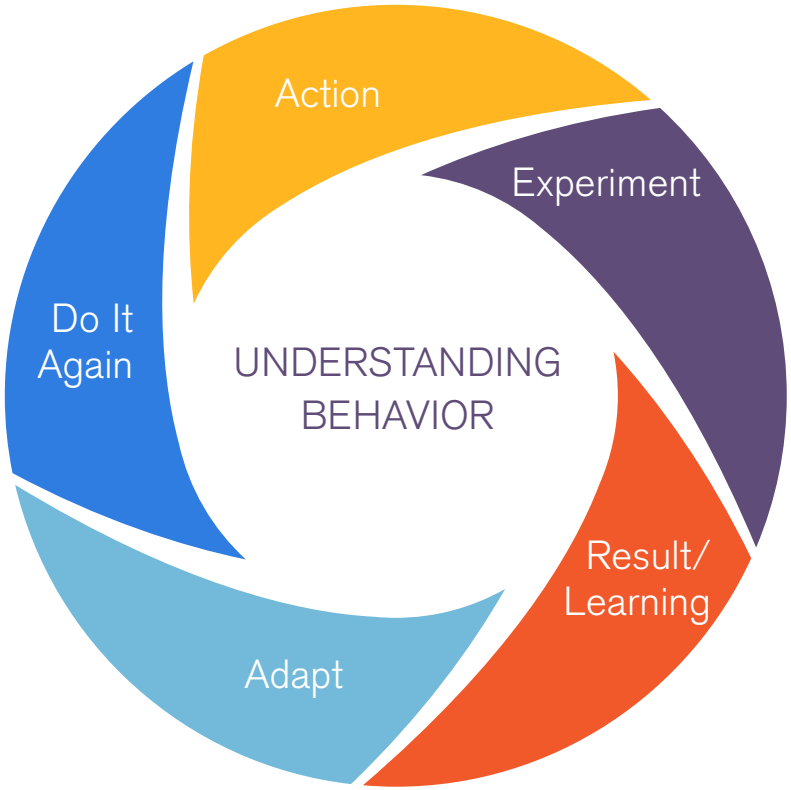
By now you're probably wondering "How do we actually DO Action Learning?"

The answer is, a community systems approach, using Improvement Kata and innovative human-centered design to help you successfully achieve your vision.

Data + Planning + Implementation + Small Experiments = BIG RESULTS



Systems Change Approach

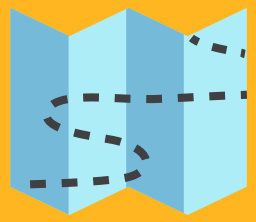


*For details, see the Understanding Behavior Toolkit

Planning Phase

1

Define your vision.



Planning Phase

2

Grasp the current condition.

YOU ARE HERE

Planning Phase

3

Establish the next target condition.

Doing Phase

4

Experiment toward the target condition.

Repeat

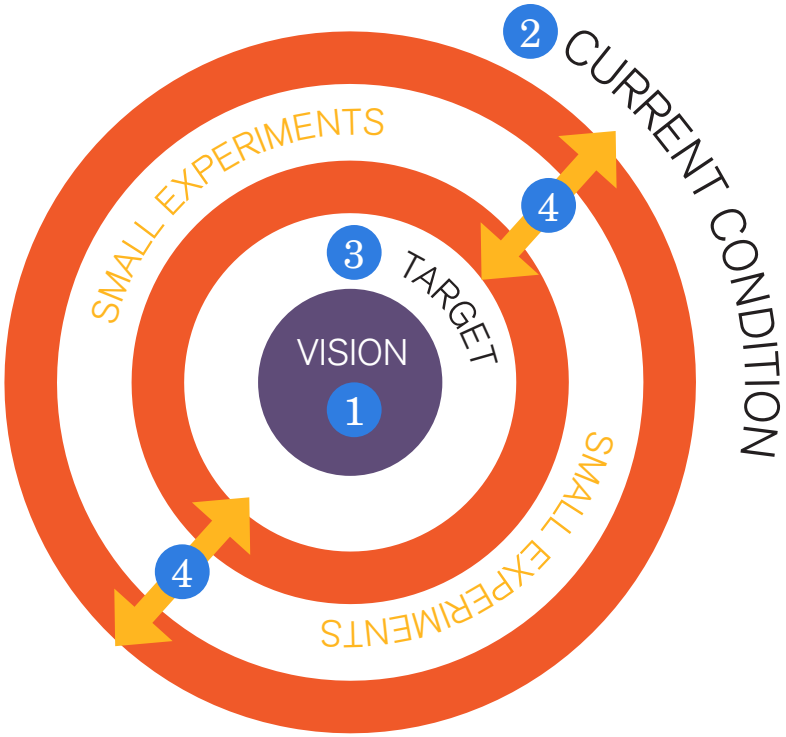
5

What did you learn?

Adapt the experiment.

Do it again.

The Planning and Doing of Action Learning



1 VISION
Community Health Center (CHC) refers families to your program.

2 CURRENT CONDITION
CHC does not refer families currently.

3 TARGET CONDITION
CHC refers three families a month.

4 SMALL EXPERIMENTS
You provide CHC with a script to use when talking to patients and they use it.


We name our vision.

ACTION LEARNING

STEP 1

Define your vision.

How to define your vision:

Ask others in your community for their input and invite diverse perspectives to help you decide the best vision for your community.

- Parents
- Providers
- Community partners
- Direct service staff

Your vision should:

- Engage diverse perspectives to define the challenge you will address
- Connecting this vision to the state's vision that more children begin kindergarten safe, healthy, eager to succeed and ready to learn is an great first step.
- Consider phrases such as:
  - Improved child development and school readiness
  - Improving outcomes for low birth weight babies
  - More children from priority populations enrolled in high quality early learning programs.
- Be attainable in the long-term future.
- Be clear to all partners involved in your work.

ACTION
LEARNING

STEP 2

Describe the Current Condition.

- Survey yourselves. What worked, and what didn't work. What did you try? What did you expect? What actually happened?
- What data is available to describe in numbers, demographics, etc.
- We don't know everything, so we ask others in your community.
- You are the expert. Parents are the experts. Providers and schools are the experts. People from the community are the experts. Ensure their voices are a part of this.
- Deep dive to get to the root cause [of what] and the brainstorm a set of possible solutions to solve the root barrier for families.
- Every community is unique.

ACTION
LEARNING

STEP 2

Describe the current condition.

Gather data to define the existing situation and to help you form your experimental process.

Data helps us learn:

- Data provides an unbiased view of the current situation.
- Decisions without data are just feelings.
- We don't know what we don't know until we get outside and try.
- When something doesn't work, think of it as a data point. A piece of information we didn't have before.

ACTION
LEARNING

STEP 2

Describe the current condition.

Questions to ask:

Gather data to define the existing situation and to help you form your experimental process.

Who are the highest need families in our community?
- How many?
- Where do they live?
- Where do they get care?

Check out our using data toolkit to get this information in your community!

Are they being served in early childhood programs?
- Why or why not?

Who serves children and families from priority populations?
- What is our relationship to these organizations?

Check out our pipeline toolkit for more info to build partnerships!

Start the Obstacles Parking Lot

These are obstacles relative to the Target Condition

Once you have a Target Condition you'll gain insight into some of the obstacles that are in your way. Ask yourself, "What is preventing us from reaching this Target Condition?"

Use the form at the end of this guide to start a "Parking Lot" of obstacles. These are not observations about opportunities for improvement, but issues that specifically appear to be preventing you from reaching the Target Condition.

Do not turn the parking Lot into an action-item list. It's just a place to note and hold perceived obstacles, on **which you may or may not work on.**

Other obstacles may be discovered and added to the parking lot along the way. The steps you take will be determined by your experiments in the next phase.

ACTION
LEARNING

STEP 3

Establish the next target condition.

Work with partners to refine the next target towards your vision.

Write these down.

Ask questions if something isn't clear.

What do you want to achieve first? Choose a small goal you believe is likely achievable.

- Rather than focusing on the desired end result *(EX: Community Health Center refers 10 families a month)*, focus on an incremental goal that will get things started *(EX: Community Health Center refers 3 families a month)*.

Once you have completed your experiment, compare the results to the Target Condition. (See bonus section to play with a fun way to sort and select your experiments.)

- What did you learn? Ask your partners, parents, and other key stakeholder.
- Adapt to what you learned
- Define a new Target Condition
- Complete a new experiment to help move another step toward your ultimate vision.

ACTION
LEARNING

STEP 4

Experiment toward the target condition.

Plan, Do, Check, Act:

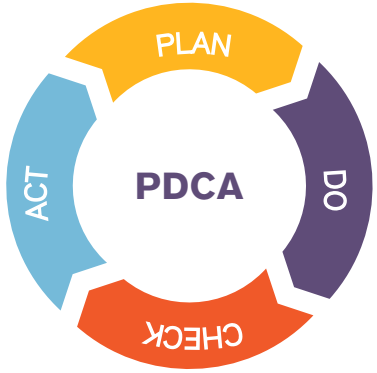
PDCA is a way to think about the experimentation and ongoing learning cycle. It is what you are really doing – over and over and over again. Achieving small successes through an iterative process that will lead to BIG RESULTS in the end. This is Action Learning:

Plan: Define what you expect to do and what you expect to happen. This is your hypothesis or prediction.

Do: Conduct an experiment to test your hypothesis.

Check: Compare the actual outcome with your expected outcome. What worked? What didn't work?

Act: What's next? Standardize and stabilize what works or begin the PDCA cycle again.



KEEP CALM AND GET OUT OF THE BUILDING

Now look at data.

ACTION
LEARNING

Simple questions to help you and your partners reflects on your strategies.

	Basic Question	Clarifying Questions
1	What is our target condition?	• Is this measurable? • What do we expect to happen? • What is the pattern we are trying to achieve?
2	What is actually happening now? • What was our last step? • What did we expect? • What actually happened? • What did we learn?	• Do we have data? Let's look at it. • Exactly what did we do? • Do we have data? What did we see? • Why is this important? How will this help?
3	Which obstacles are preventing you from reaching the target for change?	• Were there any new obstacles we identified in our last experiment? • Have we overcome any obstacles?
4	What is your next step?	• Exactly what data will we collect? • Who and how will we collect it? Let's look at it.
5	When can we go and see what we've learned from taking that step?	• What date and time will we meet again? • When will we have the data?

ACTION
LEARNING

Remember…

Ongoing reflection and action learning

- Focus on succeeding early and fast.
- Make success easier than expected.
- Focus on succeeding often, not big.
- Frequency of success rather than size.

ACTION
LEARNING

Avenues to Get Information.

How can we learn what is working?
Decisions without data are just feelings.

We can ask!

We track data and look at it!

- Don't guess.
- Don't rely on opinion.
- Don't work from inside…get outside and DO.

ACTION
LEARNING

Remember…

- Early experience frames all that follows.
- Early success creates desire to do this again as well as increasing the habit or practice.
- This leads to delight and eagerness to do more.
- Gives success momentum, which propels people forward despite adversity.
- Success leads to success.
- Continued progress provides motivation to keep going.
- Small wins, lead to big change.*

*Source: Fogg, BJ. BJ Fogg Behavior Model. http://behaviormodel.org

Bonus: How do you decide what to focus on first?

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ACTION
LEARNING

Wave a magic wand.

In a perfect situation, what would your vision look like? What does victory look like?

What would be happening—partners making more referrals? More children enrolling in your programs?

Think about what conditions would make these a reality? Write each of these reasons (obstacles) on a individual post it notes.

ACTION
LEARNING

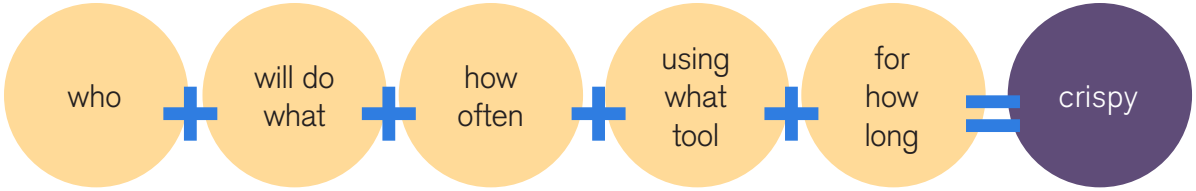
Make it Crispy!

Work with your partners to be sure you all see the same vision and target conditions.

Here's a tip: ask, "who, will do what, how often, using what tool?"

This is a great way to reduce conflict and get your partners on the same page.

This helps your team see the same vision.



Vision: Partner organizations refer more families to us during each visit, using a common referral form every time.

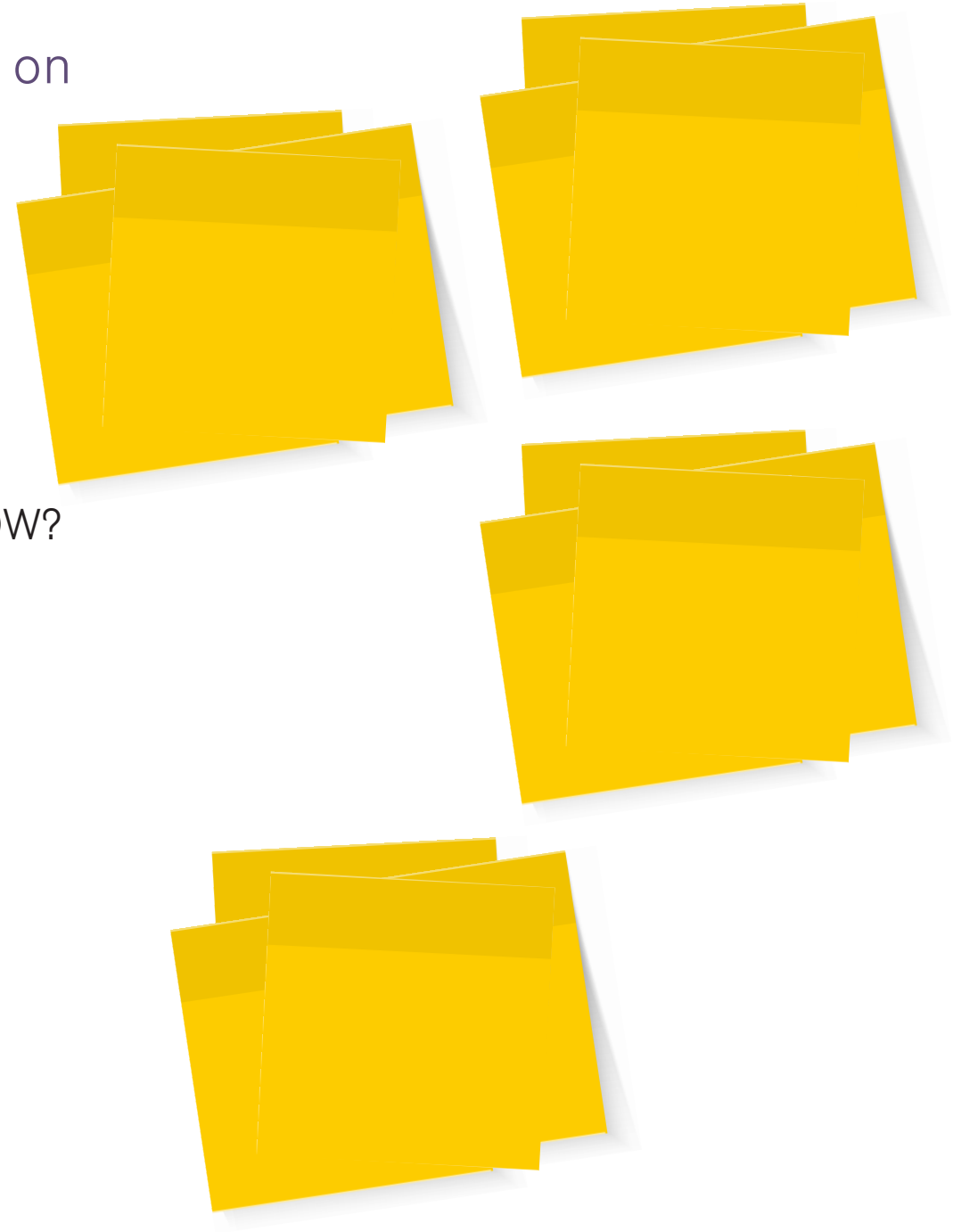
First, prioritize what to focus on

Gather data with the community:

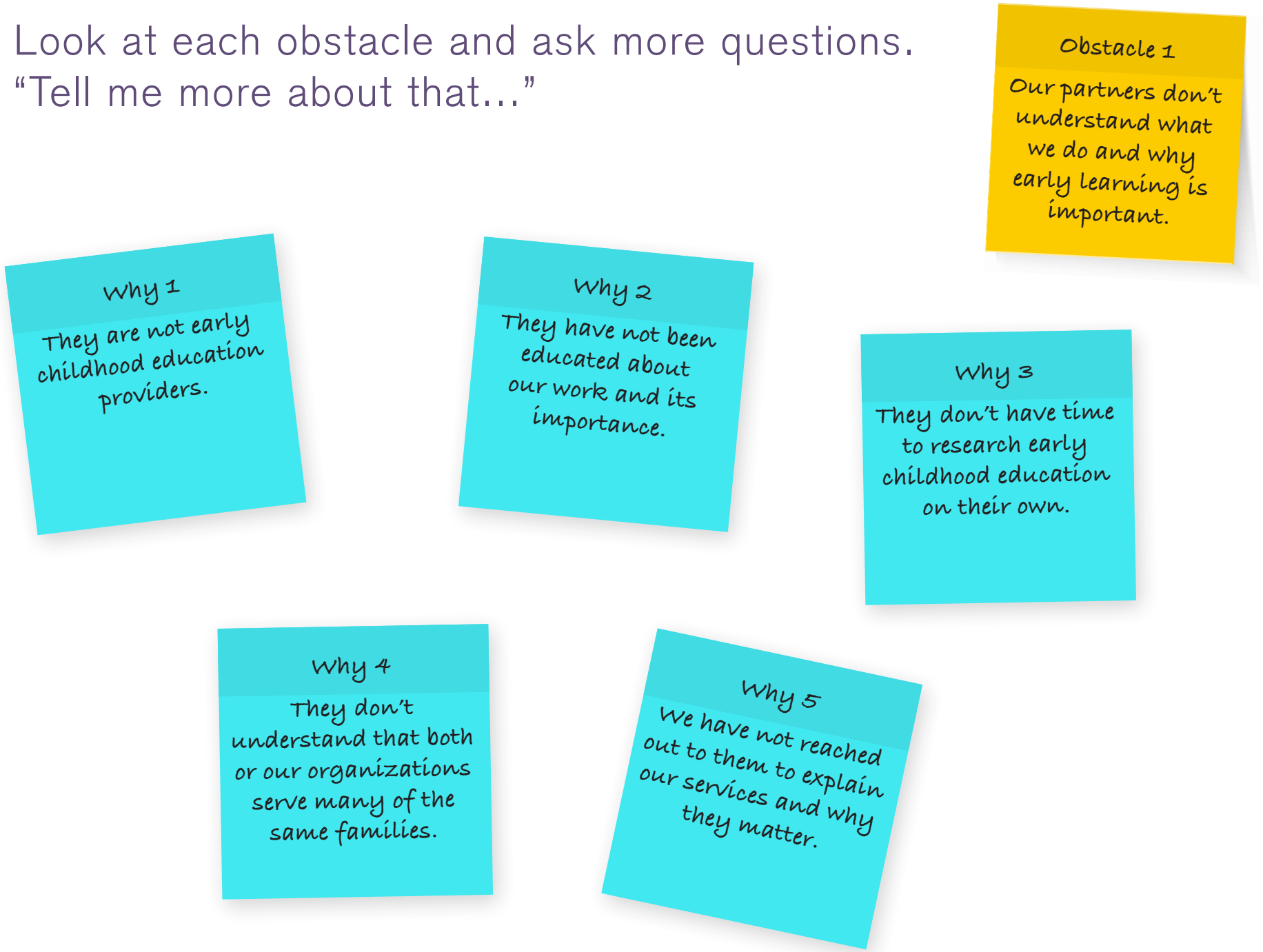
- Get diverse perspectives.
- Look at the numbers.
- Ask “Why” 5 times.
- Brainstorm with a “magic wand”.

Then ask, what is feasible to tackle NOW?

Do we have a partner willing to work with us on a small experiment to address one of the obstacles?



Look at each obstacle and ask more questions. "Tell me more about that..."



Then turn the “Whys” into experimental solutions you can try.

Why 1

They are not early childhood education providers.

EXPERIMENT: Host a meeting to share the what, whys about early childhood education.

Why 2

They have not been educated about our work and its importance.

EXPERIMENT: Share data with them about the community and the impact our organization has had.

Why 3

They don’t have time to research early childhood education on their own.

EXPERIMENT: Host a meeting to share the what, whys about early childhood education.

Why 4

They don’t understand that both or our organizations serve many of the same families.

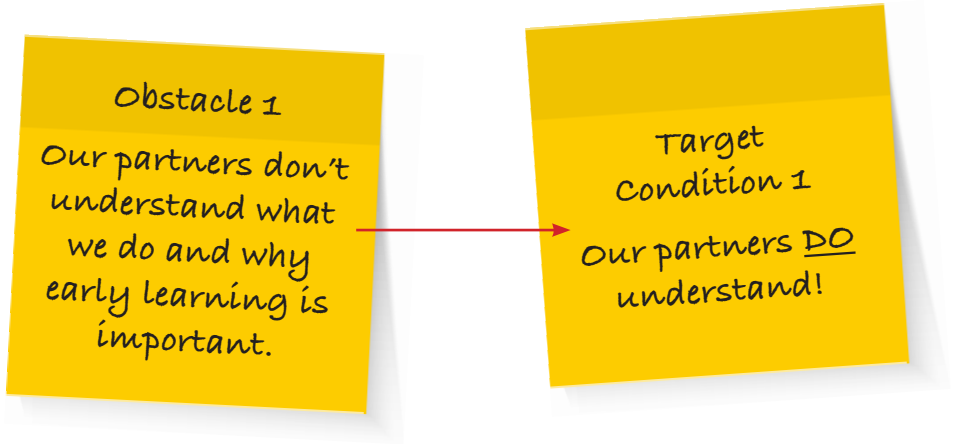
EXPERIMENT: Schedule a meeting with them to share the benefits to the community of working together.

Why 5

We have not reached out to them to explain our services and why they matter.

EXPERIMENT: Select a single person in your organization to conduct this outreach and engage partners.

Make the negative a positive to create new Target Conditions.



Sort the ideas: What would be most effective? Which can you do **NOW**?

Obstacle 1

Our partners don't understand what we do and why early learning is important.

Why 1

They are not early childhood education providers.

EXPERIMENT: Host a meeting to share the what, whys about early childhood education.

Why 2

They have not been educated about our work and its importance.

EXPERIMENT: Share data with them about the community and the impact our organization has had.

Why 3

They don't have time to research early childhood education on their own.

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We have not reached out to them to explain our services and why they matter.

EXPERIMENT: Select a single person in your organization to conduct this outreach and engage partners.

Note that there is overlap with some of the experimental solutions.

Obstacle 1

Our partners don't understand what we do and why early learning is important.

Why 1

They are not early childhood education providers.

EXPERIMENT: Host a meeting to share the what, whys about early childhood education.

Why 2

They have not been educated about our work and its importance.

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We have not reached out to them to explain our services and why they matter.

EXPERIMENT: Select a single person in your organization to conduct this outreach and engage partners.

ACTION
LEARNING

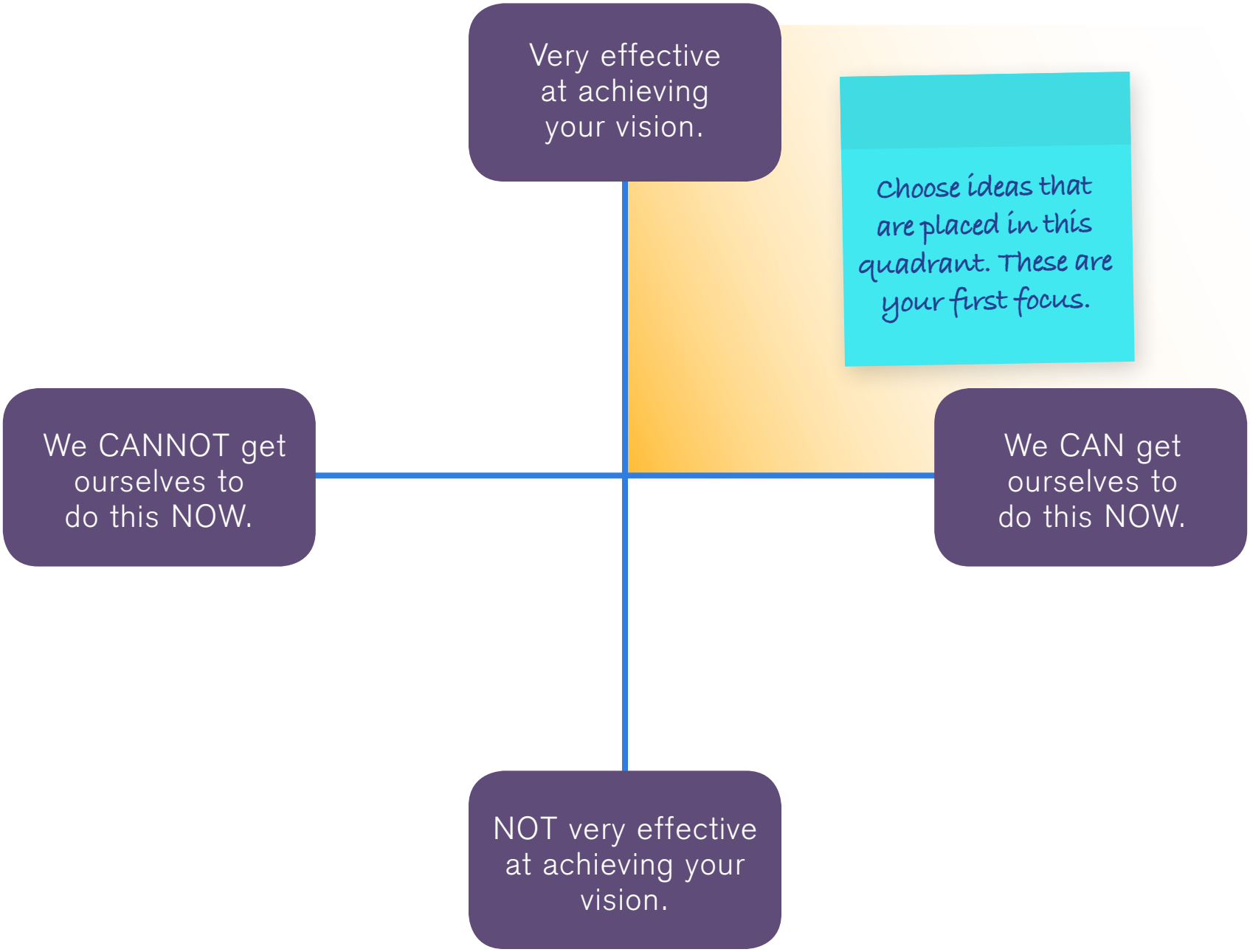
From the exercise so far…

Obstacle 1: Our partners don't understand what we do and why early learning is important.

For Obstacle 1 you have identified three potential experimental activities:

1. Host a meeting to share the what, whys about early childhood education, your organization.
2. Share data with them about the community and the impact our organization has had.
3. Select a single person in your organization to connect with and engage partners.

Focus Mapping



ACTION LEARNING

Create a Focus Map to help you prioritize which activity you can do NOW.

Using your post-it notes, consider each possible solution and use the focus map to rank them.

First, for each idea ask if it would be very effective or not very effective at increasing referrals from this partner.

- **Move ideas up and down (would *really* work, up top)**

Second, for each idea ask whether yes, we can get the partner to participate or no, we can't get the partner to participate.

- **Move ideas left to right (we *can* do to the right).**

Third, look at the ideas together.

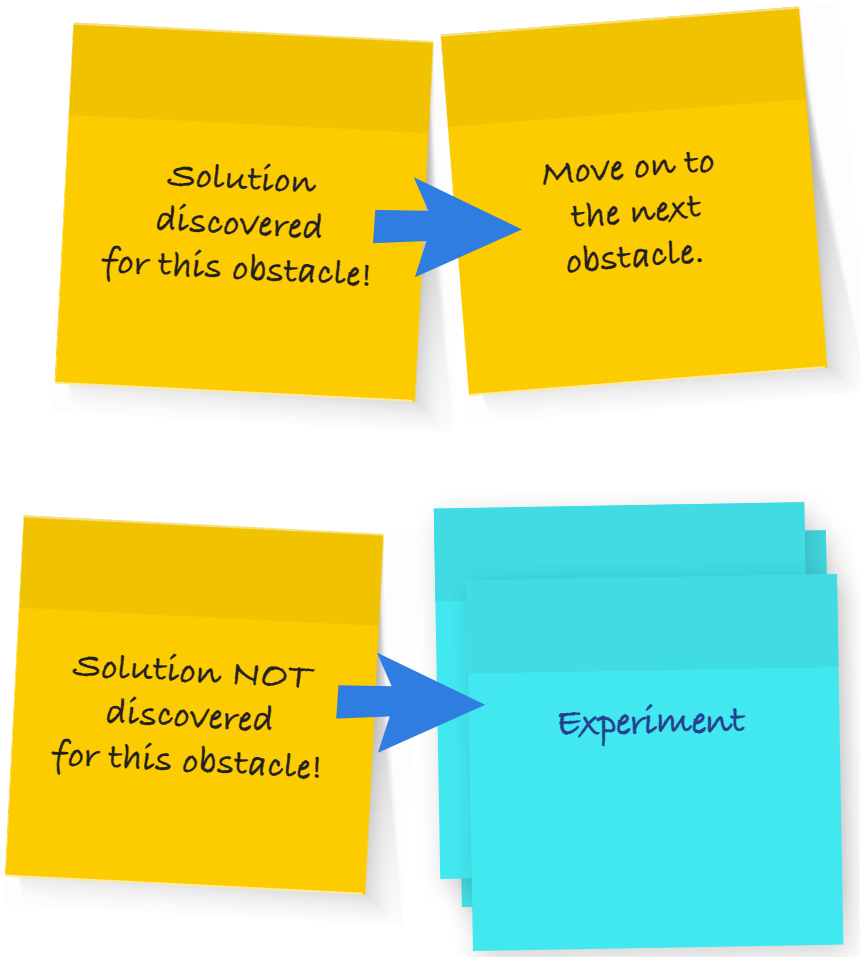
- **Are they clear? Do they make sense where placed?**

Select from the ideas **in the top right quadrant.**

Now DO the experiment.

Did you accomplish the target condition?

- If yes, then continue to implement the solution/activity you tested.
- Use the five questions to reflect.
- If not, try a different experiment.
- No failure only learning!
- When something doesn't work, think of it as a data point… A piece of information you didn't have before.



More obstacles will come up on the road to victory.

- Track new obstacles that arise, ask more questions and create experiments to address them.
- Reflect early and often using the five questions.
- PLAN, DO, CHECK, ACT — over and over until the obstacle has been eliminated.

ACTION
LEARNING

Use the five questions Improvement Kata questions to guide you through the experiments.

Reflect at least weekly. Remember: no failure only learning! You may have to make adjustments. Maybe your target condition isn't feasible after all? Maybe the data from "getting outside of the building" showed you a new direction is more feasible/effective. Just keep your eye on your vision.

COACHING KATA

The Five Questions

1. What is the **Target Condition**?
2. What is the **Actual Condition** now?

Turn Card Over

3. What **Obstacles** do you think are preventing you from reaching the target condition? Which *one* are you addressing now?
4. What is your **Next Step**? (Next experiment) What do you expect?
5. How quickly can we go and see what we **Have Learned** from taking that step?

*You'll often work on the same obstacle with several experiments

COACHING KATA

Reflect on the Last Step Taken

Because you don't actually know what the result of a step will be!

1. What did you plan as your **Last Step**?
2. What did you **Expect**?
3. What **Actually Happened**?
4. What did you **Learn**?

Return to question 3

ACTION
LEARNING

How does an Action Learning approach help?

Action Learning uses a process of systems thinking to:

- Successfully pursue small goals that seem unattainable within our community.
- Enable us to make incremental (small) improvements close to the action in our community.

Action Learning allows us to work incrementally toward achieving our vision.

SMALL STEPS = BIG WINS

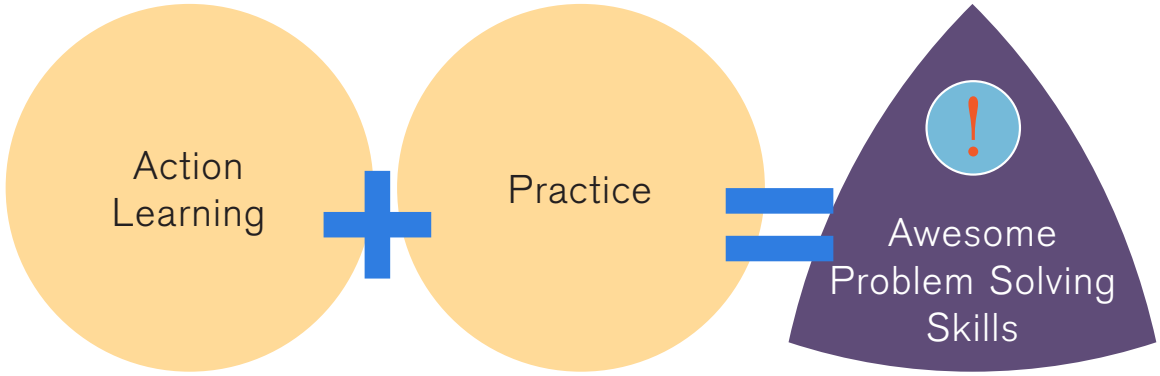
Each experiment that doesn't produce the results you expect provides new information that you didn't have before.

There is NO failure – only learning!

ACTION
LEARNING

Practice Action Learning to make it a habit.

- **Practice and practice** using the information in this guide.
- You will build a sense of mastery the more you practice.
- **With mastery comes enthusiasm** and an embedded practice in our work!



Remember, it's not how great you start, it's how great you finish that matters!

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