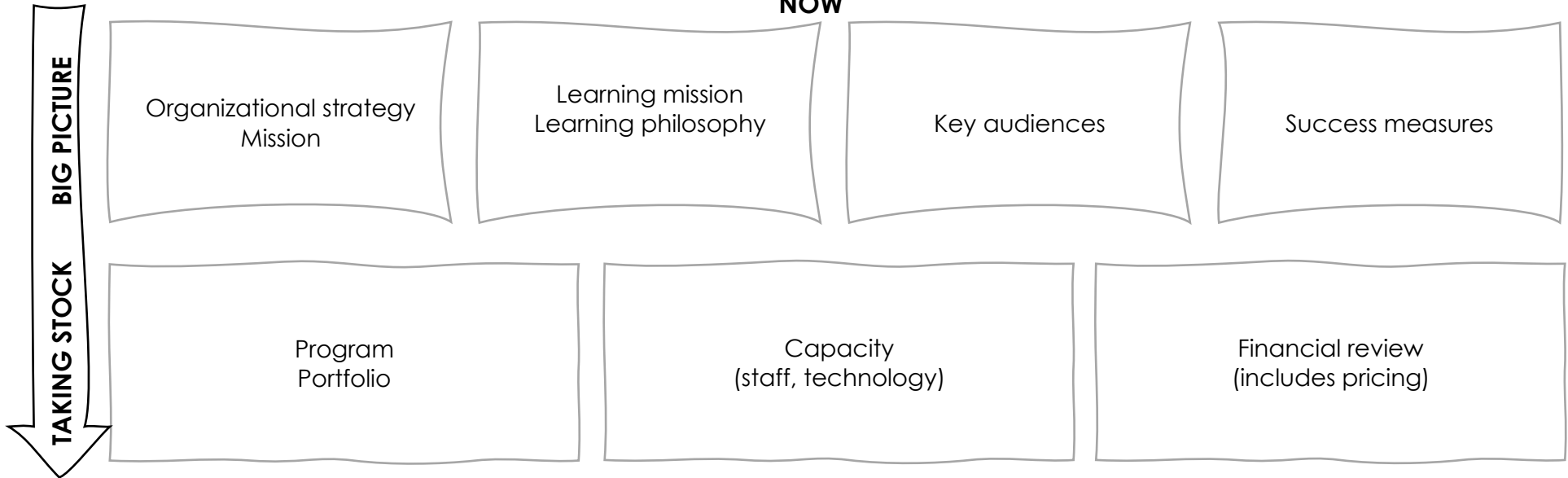


# Build a Learning Strategy WORKBOOK

## Learning Strategy Roadmap | An overview

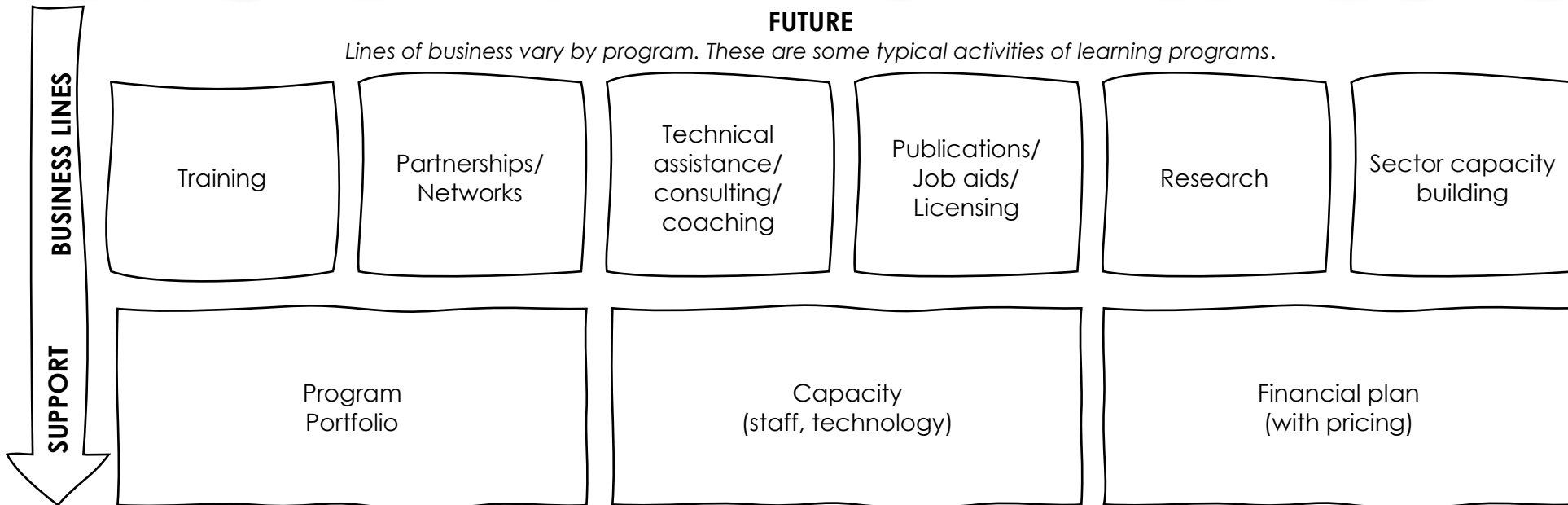
NOW



DECISION MAKING

FUTURE

*Lines of business vary by program. These are some typical activities of learning programs.*



WORK PLAN

# Learning's role in the strategic plan

<b>Organization strategic plan.</b> What are the key elements in your strategic plan?	<b>How does your LEARNING PROGRAM support the achievement of your strategic plan goals?</b>
<i>EXAMPLE</i>	
<i>Expand the number of people with board training.            Engage more nonprofits in advocacy efforts.            Diversify income streams.</i>	<i>Develop board curriculum and deliver trainings.            Train nonprofits in advocacy methods.            Develop "job aids" (checklists, "how to" guides for board members) to help advocacy efforts.            Run a conference that raises funds.            Run fee-for-service trainings.</i>

# Learning Program Pathway

*Where you are is a fine place to be. Our goal is to support you as you move to a position of strength.*

This chart is designed to help you gauge your program's maturity. Circle the statements that best describe your learning program.

	<b>DEVELOPING</b>	<b>SOLID</b>	<b>STRONG</b>
<b>Leadership</b>	<ul style="list-style-type: none"> <li>○ No articulated vision on how learning serves the mission or organizational strategy</li> <li>○ No clear objectives for learning program</li> <li>○ Plan learning events one by one</li> <li>○ See learning as a transaction</li> </ul>	<ul style="list-style-type: none"> <li>○ Clear vision for how the learning program can achieve the learning goals of the organization</li> <li>○ Shared understanding of what learning program success looks like.</li> <li>○ Learning events planned holistically, finding connections between events</li> <li>○ See learning as transformational</li> </ul>	<ul style="list-style-type: none"> <li>○ Clear vision for how the learning program can help all programs achieve their goals</li> <li>○ Culture of learning across the organization</li> <li>○ Cross-program success measures</li> <li>○ Learning viewed as a process beyond events</li> <li>○ See learning as an experience based on relationships</li> </ul>
<b>Programs</b>	<ul style="list-style-type: none"> <li>○ Opportunistic without planning, offering programs that others create and deliver</li> <li>○ Piecemeal approach</li> <li>○ No system for quality control</li> <li>○ Evaluation based on participant experience at event</li> </ul>	<ul style="list-style-type: none"> <li>○ A schedule of programs that respond to needs.</li> <li>○ Alignment of programs and partnerships</li> <li>○ Pricing strategy that is sustainable.</li> <li>○ Clear quality standards</li> <li>○ Evaluation that provides meaningful data</li> </ul>	<ul style="list-style-type: none"> <li>○ Programming integrates events, tools, coaching, and other supports</li> <li>○ Cross-program planning (advocacy/learning/membership)</li> <li>○ Learning program is a profit center.</li> <li>○ Set the bar on quality</li> <li>○ Evaluation measures learning transfer</li> </ul>
<b>Portfolio</b>	<ul style="list-style-type: none"> <li>○ No in-house portfolio of curriculum or learning tools</li> </ul>	<ul style="list-style-type: none"> <li>○ A collection of curricula and/or learning tools (that you own) that addresses core topics</li> </ul>	<ul style="list-style-type: none"> <li>○ An integrated curriculum and set of learning tools (that you own) is readily available to learners.</li> </ul>
<b>Communications</b>	<ul style="list-style-type: none"> <li>○ No learning-related communications beyond marketing and logistics</li> </ul>	<ul style="list-style-type: none"> <li>○ Pre- and post-event communications that boosts learning</li> </ul>	<ul style="list-style-type: none"> <li>○ Expanded communication that offers opportunities for additional practice and support</li> </ul>
<b>Capacity</b>	<ul style="list-style-type: none"> <li>○ No in-house knowledge about adult learning</li> <li>○ Limited staff support</li> <li>○ No in-house systems or skills for using learning technology</li> </ul>	<ul style="list-style-type: none"> <li>○ Learning program staff are current on adult learning</li> <li>○ Adequate staffing for programs</li> <li>○ Draw on existing networks</li> <li>○ In-house technology systems with skilled staff</li> </ul>	<ul style="list-style-type: none"> <li>○ Learning program staff are viewed as leaders in adult learning</li> <li>○ Invest in subject matter experts, presenters, and facilitators</li> <li>○ Sustainable staffing</li> <li>○ Leverage and create networks</li> <li>○ Staff able to innovate new uses of technology</li> </ul>

Inspired by the Learning Business Maturity Model by Jeff Cobb and Celisa Steele

# Key Audiences

Who do you serve?

Person 1	Person 2	Person 3
<b>Describe this person.</b>		
<i>Example: Board members. Busy people, diverse in age and experience, can't meet during the day, often overwhelmed with duties, need tools to perform better.</i>		
<b>What do you want this person to DO. (You should be able to see or hear it.)</b>		
<i>Example: Keep their organizations legal, raise money, communicate with policy makers.</i>		
<b>Who do you NOT serve?</b>		

# Program Overview

What do you do? What portfolio of learning tools do you own?

Program	We do this.	We don't do this.
In-person programs		
Core*		
More*		
Online learning		
Core		
More		
On demand		
Core		
More		
<b>Curriculum, tools, or resources you OWN</b>		

\* Core/more: Core means central to your mission. It is so important to your mission, branding, or partnerships that you would take a loss to do this. More is everything else that you do, most likely to earn revenue or meet a need (but not for a loss).

# Financial Review

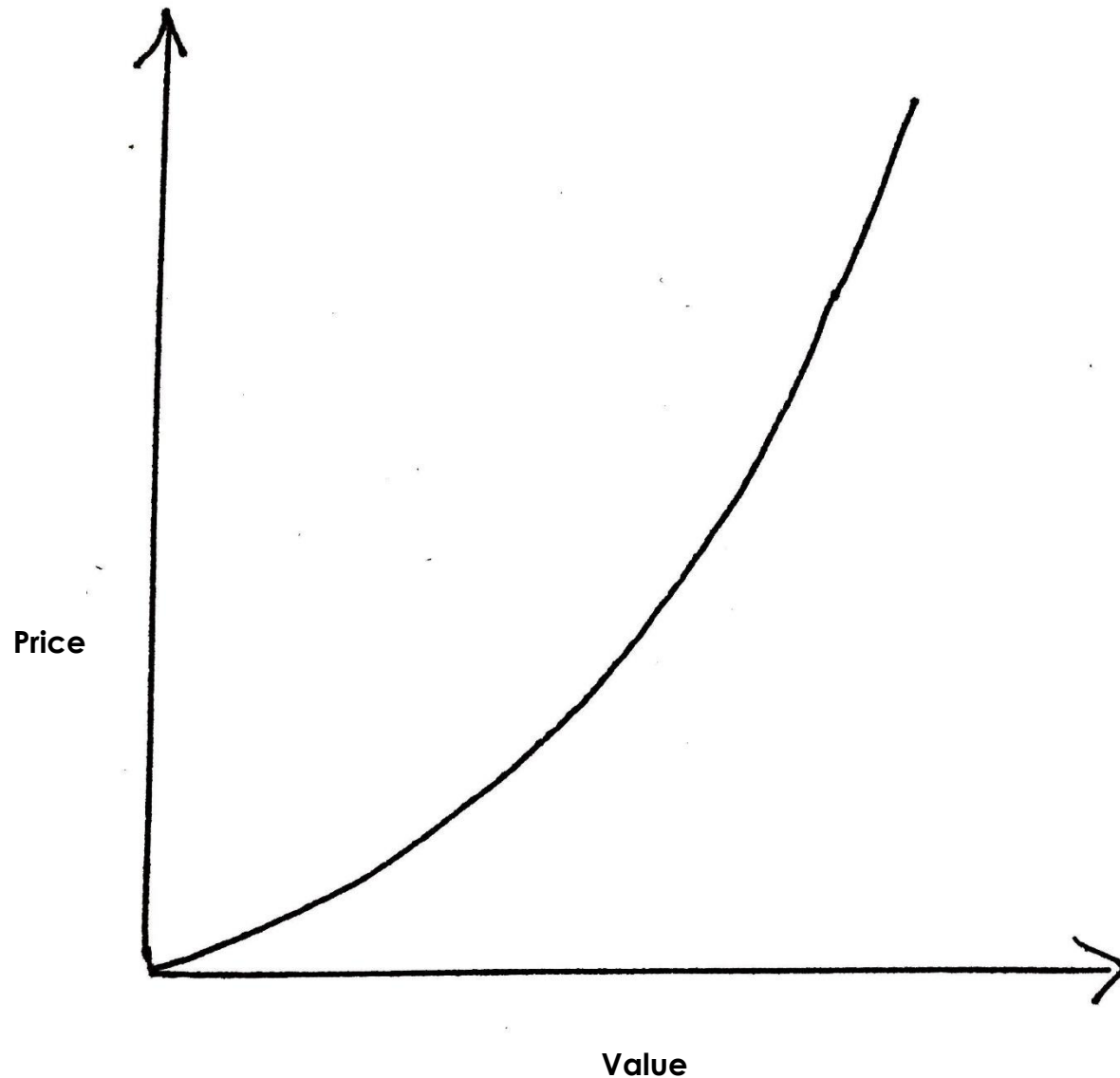
What are your sources of revenue?

Source	% of budget in 2019	% of budget in 2020	Trends impacting 2021
Earned income			
Foundation grants			
Government grants			
Sponsorship/corporate grants			
Unrestricted (membership, donors, endowment)			
<b>TOTAL REVENUE</b>			
<b>TOTAL EXPENSES</b>			

Financial notes:

# Pricing Model

How do your prices fall on the Tagoras Strategic Pricing Value Ramp™?



## PRICING CONSIDERATIONS

You can achieve many goals through pricing.

- Expand # of people who buy
- Deepen the commitment of people who buy
- Expand the diversity of products people buy
- Signal an increase in value of a purchase
- Speed up how quickly people buy
- Raise your profile as an organization
- Raise the profile of people who buy
- Increase loyalty of members
- Drive people to become members
- Simplify your workload

Which goals match your organization? Circle them.

NOTES:

# Learning Strategy Metrics | Sample data to track

A balanced measure of learning program success

IMPACT		INFLUENCE		REVENUE	
Individual	# people attend % people who gained knowledge, skills and tools % people able to take action Evaluation scores	Nonprofit practice	# program attendees that become members % organizations who collaborate % orgs engaged in policy	Fees for service	Cash flow Full cost accounting # trainings sold to local funders
Organizational	# organizations represented % organizations in state % board members within org # people within organizations	Capacity builders	# organizations in network % members # consultants who use your curriculum	Grants	# grants received Diversity of grants received # General operating grants
Regional/network	Strength of partnerships % of organizations attending network events Change in key metrics	Government	# agencies with nonprofit advisors	Conferences	Full cost accounting Profit
Sector	% nonprofits are members % nonprofits that have attended core event	Philanthropy	% foundations partnering with nonprofits % funded general operating expenses	Membership	Membership funds that can reinvested in learning