

Learning for **RESULTS**

ACTION GUIDE





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Grantmakers for Effective Organizations is a coalition of more than 300 grantmaking organizations committed to building strong and effective nonprofit organizations. Understanding that grantmakers are successful only to the extent that their grantees achieve meaningful results, GEO promotes strategies and practices that contribute to grantee success.

More information on GEO and a host of resources and links for grantmakers are available at www.geofunders.org.

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FOREWORD

Grantmakers and grantees are working together toward complex goals; a continuous commitment to learning and improvement is critical to achieve the change we seek. In this GEO Action Guide, we explore what it means to be a “learning organization;” how to make the case for a stepped-up commitment to learning to your staff, board and grantees; and strategies to embed learning in your day-to-day grantmaking work.

Over the years, the collective wisdom about how philanthropy learns and improves has come a long way. But it is still a somewhat nascent field, with much more to learn. At GEO, we’ve been on our own learning journey. For example:

- *We’ve learned that knowledge management and evaluation are tools to support the broader goal of learning.* Looking through the learning lens will help grantmakers see knowledge management not as a discrete function but rather as a mind-set that can help drive continuous improvement. And evaluation, when viewed in the context of learning, evolves from an accountability mechanism — i.e., did the grantee do what it said? — to a means of generating information that helps grantmakers and their grantees understand and solve problems more effectively as time goes on.
- *And we’ve learned that grantmakers need to reach beyond their own organizations for real learning to take hold.* Today, after three national conferences on learning, many grantmakers have reached a state of relative comfort on what it takes to get their own shops in order (the first level of learning). But learning has little hope of yielding progress on social change issues if contained within the walls of one organization. The next order of business is to better understand how effective learning can happen across organizations, including both grantmakers and grantees. While there are certainly some innovators on this front, this is an area where the documented successes are fewer.

We thank you for joining us on this learning journey, and we encourage you to keep looking to www.geofunders.org for the latest learning and resources on this important issue for philanthropy. We hope you will continue to share your stories and breakthroughs with us.

Kathleen Enright
GEO Executive Director

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INTRODUCTION

“All change arises from a change in meaning, when we change our understanding of what is going on.”
— Margaret J. Wheatley

Effectiveness in philanthropy is not just about the money. It is also about how grantmakers use what they are learning to lead change and achieve better results.

“Organizational learning” can sound to many like a catchphrase, the latest flavor of the month in nonprofit (or for-profit) management. But in reality, the term refers to a mind-set and a mode of operating that can help grantmakers and their grantees be more effective and more successful.

Learning is about continual reflection — asking and answering key questions you need to know to make smarter decisions. It’s about engaging staff, board and grantees in reflective discussions of what works (and what doesn’t) to advance your organization’s mission and goals. It’s about creating opportunities for staff, board, grantees and other grantmakers to share practical insights and lessons gleaned from their work in ways that help everybody do a better job.

Too often in philanthropy, we think about learning as a means of proof — to determine whether X grantee did what it promised or whether Y intervention succeeded or failed. GEO’s goal is to change this perception so grantmakers think about learning as a tool for improvement.

ACTION GUIDE GOALS

- Set forth a common framework that grantmakers can use to understand the goals of organizational learning, the tools that support it, and the organizational culture and structures that should be in place for it to succeed.
- Highlight examples of grantmakers that have had success in finding ways to learn from previous experiences in a manner that leads to improved grantmaker and grantee performance.
- Chart a course for future learning for the field.

TABLE OF CONTENTS

Master the Basics	5
What is learning for improvement?.....	5
How do grantmakers define learning?.....	6
How does learning relate to knowledge management and evaluation?.....	9
Make the Case	13
Why should we invest our time and resources in learning?.....	13
Make It Work	17
How can we know what is right for us?.....	17
<i>Case Study: Planning for Learning: Laidlaw Foundation</i>	21
How can we get started?.....	23
<i>Case Study: Building Internal Capacity for Learning: NewSchools Venture Fund</i>	26
How can we build a culture that embraces learning?.....	28
How can we learn from our failures?.....	30
How can we make sure we are learning with and from our grantees?.....	31
<i>Case Study: Learning With Grantees: Deaconess Foundation</i>	34
How can we build the learning capacity of grantees?.....	36
How can we learn with other grantmakers?.....	40
<i>Case Study: Learning With Other Grantmakers: Community Foundation for Greater Buffalo and John R. Oishei Foundation</i>	42
Move It Forward	45
What are the next steps for the field?.....	45
Resources	48



MASTER THE BASICS

What Is Learning for Improvement?

Organizational learning has been the focus of countless studies, articles and books. Two early researchers in the field defined the term simply as “the detection and correction of error.”¹ In recent years, the definition has evolved to refer to the many ways in which an organization uses knowledge, information and human capacity to improve performance.

Peter Senge’s best-selling book *The Fifth Discipline* popularized the concept of “the learning organization,” which he defined as an organization where

people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.

Senge argued that in situations of rapid change, only organizations that are flexible, adaptive and productive will excel. For this to happen, he said, organizations need to “discover how to tap people’s commitment and capacity to learn at *all* levels.”²

While organizational learning, like other hot topics in management and leadership, has gotten a lot of buzz, grantmakers would be mistaken to write it off as a fad or a fringe concern. In increasing numbers, grantmaking organizations and their leaders see learning as a route to increased effectiveness and better results for their organizations, their grantees and the communities they serve.

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1. C. Argyris & D.A. Schon. *Organizational Learning: A Theory of Action Perspective*. Reading, MA: Addison-Wesley. 1978.
 2. Peter Senge. *The Fifth Discipline: The Art and Practice of the Learning Organization*. New York: Currency Doubleday. 1990.

How Do Grantmakers Define Learning?

Originally, the discussion of learning was primarily restricted to the private sector. The focus was how companies can improve business results through improved systems for learning. But over time, grantmakers began to develop their own definitions of learning — and their own ideas about how to make learning a driver of philanthropic success.

While different organizations will have different ideas about what learning means to them, GEO's focus is the learning that happens within and between grantmakers and nonprofits leading to broader results. Put another way, it's the process of asking and answering the questions that will help grantmakers and nonprofits improve their performance.

“We want to engage in learning for a reason,” said Martha Campbell, vice president for programs at The James Irvine Foundation. “Just having discussions and coming up with interesting insights is not enough; you need to be able to act on it. And you need to have the capacity to make sure good ideas can be captured and that there is accountability in how you apply what you learn.”

Learning, therefore, is not an event. You cannot put it on your calendar. Rather, it is a continuous process, a culture and a commitment to support the capacity of people to reflect on their work in a way that helps them see the way to better results.

Marilyn Darling, founding partner of Signet Research & Consulting, LLC, said that grantmakers, like for-profit companies, have become quite

proficient in recent years at drawing out lessons from their work; it's in applying those lessons where organizations fall short.

“We are good going from planning to action and from action to reflection,” Darling said. “The place where we have trouble is taking lessons from the past and applying them to getting a better result next time. We under-invest in making sure we collectively apply what we are learning, make predictions, conduct experiments and track if they're succeeding.”

Roberto Cremonini, chief knowledge and learning officer with the Barr Foundation in Boston, made a distinction between “knowledge transfer” and “real learning.” Organizational learning, he said, “is not about doing everything you can to put more knowledge into people's heads.” Rather, he emphasized the importance of involving people in learning at a more personal, experiential level — so they can make sense of their work and reflect on the results they are seeing (or not seeing), and ultimately adapt their strategies to improve their results.

Cremonini cited the example of the Barr Foundation's “quarterly reflections,” meetings where staff participate in a discussion of one topic or theme selected by a Barr program officer. Examples of topics include reviewing a specific theory of change, or discussing a specific challenge or challenges in moving an initiative forward. At the end of each session, participants summarize what they are going to do differently as a result of the reflection session — i.e., how are they going to apply what they learned to their work?

THE CORE COMPONENTS OF FOUNDATIONS THAT LEARN

In the same way that Peter Senge and other researchers have identified the key features of the learning organization, researchers at the Chapin Hall Center for Children sought to find out what best facilitates foundation learning.

After a series of interviews with foundation staff, board members and researchers, the researchers identified seven core components of “foundations that learn”:

1. **A clear and concrete value proposition.** Foundations need to know what it means to learn and how learning will contribute to their work and the achievement of their goals.
2. **A compelling internal structure.** Foundations need to create organizational structures that promote and encourage learning.
3. **A leadership committed to learn.** Board, executive and staff leaders need to embrace learning.
4. **A learning partnership with grantees and communities.** Foundations need to create the conditions for learning and sharing on the part of grantee and community partners.
5. **A learning partnership with foundation peers.** Foundations need to form partnerships and networks for learning, while exploring other opportunities to learn from (and with) each other through collaboration.
6. **A commitment to share with the broader field.** Foundations that learn need to share what they learn so that others can apply their lessons.
7. **An investment in a broad and usable knowledge base.** Foundations need to produce learning that is accessible, that answers common questions and that can be applied by practitioners in the field.

The authors of the Chapin Hall report defined learning as “not only the content of knowledge but the broad range of structures, policies, and practices through which individual funders, foundations, and groups of foundations gather, organize, interpret, integrate, assess, transfer, and apply information and insights to improve organizational performance.”³

3. Ralph Hamilton et al. *Learning for Community Change: Core Components of Foundations That Learn*. Chapin Hall Center for Children. 2005.

“Part of the beauty of the quarterly reflections is that they have enough structure to engage our staff on reflective thinking, but they also leave them with the freedom to take away whatever learnings they want from the session,” Cremonini said.

The quarterly reflections at Barr are an example of how grantmakers can work to build a learning culture within their organizations. However, GEO and others have pointed out that foundations also must reach outside the walls of their organizations to engage others in the learning process. For grantmakers, learning must happen at three levels:

1. *Within* grantmaking organizations — learning from experience and sharing learning with staff and board for improved results.
2. *Across* grantmaking organizations — sharing successes, failures and challenges so our colleagues don’t end up reinventing the wheel.
3. *In partnership* with grantees — building open and honest relationships based on shared goals and a shared commitment to change.

In the following pages, we explore how grantmakers can go about creating the processes and the organizational culture that enable learning to happen at each of these levels.

“What is striking is that many people talk about becoming a learning organization like it is an end point that can be achieved. I would argue that true learning organizations are always learning how to be effective learning organizations.”

— LAURIE ALEXANDER, PROGRAM OFFICER,
HOGG FOUNDATION FOR MENTAL HEALTH

How Does Learning Relate to Knowledge Management and Evaluation?

Both knowledge management and evaluation are tools that grantmakers can use to achieve the broader goal of learning in ways that improve their performance. Grantmakers use knowledge management and evaluation to answer the question, Are we having the impact we want to have?

“Knowledge management” refers to the processes and strategies that create a culture of knowledge sharing in grantmaking organizations, from databases and intranets to Web sites and staff meetings. Evaluation is a way to generate information about what works, what doesn’t and why, and to gain clarity on the front end about what you want to accomplish.

Learning raises the “so what?” question. Why do we even care about knowledge management and evaluation? The learning lens helps grantmakers see how to use these tools more effectively in the service of performance improvement.

Among the grantmakers that are leveraging knowledge management and evaluation for learning (and improvement) is the Robert Wood Johnson Foundation. When staff and grantee survey data, combined with a review of trends in RWJF grants, suggested a tendency to support “tried and true” grantees, the foundation’s board

began exploring how the foundation could raise its risk profile and be more creative in its grantmaking. As a result of these discussions, the board created a specific portfolio group to focus solely on providing “risk capital” to organizations trying new and different approaches to improving health and health care.⁴

RWJF, of course, is a huge foundation. But the same urgent questions — “Knowledge for what? “Evaluation for what?” — apply to foundations large and small.

Looking through the learning lens will help grantmakers see knowledge management not as a discrete function but rather as a mind-set that can help drive continuous improvement. And evaluation, when viewed in the context of learning, evolves from an accountability mechanism — i.e., did the grantee do what it said? — to a means of generating information that helps grantmakers and their grantees understand and solve problems more effectively as time goes on.

4. Center for Effective Philanthropy. *Assessing Performance at the Robert Wood Johnson Foundation: A Case Study*. 2004.

DEBUNKING THE MYTHS ABOUT LEARNING

MYTH: “We don’t have the time or money to do this.”

REALITY: Learning can save time — and it doesn’t have to cost a lot of money. What it’s about is building an organizational culture where staff, grantees and others are encouraged to reflect on what they are learning, share their insights and perspectives, and act on learning to improve performance. Often, these kinds of reflective practices can be built into existing work processes. And, when done right, learning actually can save money by contributing to greater efficiency and better performance, and by ensuring that staff and grantees don’t repeat past mistakes.

MYTH: “Learning is just another word for evaluation — i.e., monitoring staff and grantee performance.”

REALITY: Framing evaluation in the context of learning makes sure the purpose goes beyond playing “gotcha.” The idea is to move beyond amassing data and information to creating a culture where people reflect on that data and information in a way that leads to better thinking and better results.

MYTH: “Organizational learning is only for larger foundations with ‘knowledge officers’ and big IT and communications staffs.”

REALITY: Becoming a learning organization doesn’t mean adding layers of new work or staff. Often it’s simply a matter of taking a closer look at what you already do — and figuring out how to do a better job incorporating a “learning for results” perspective into the foundation’s work. Besides, there are real advantages to being a small organization. For example, it’s a lot easier to share information, insights and reflections among six staff members than 50.

MYTH: “This is just a pitch for newfangled technology.”

REALITY: Learning is about people and how they collectively arrive at answers that will improve performance. Technology is only one learning tool. And instead of imposing new learning technologies on staff and grantees, it’s better to ground the effort in familiar technologies and organizational practices that facilitate shared reflection and learning.

MYTH: “There’s no way to measure the return on learning.”

REALITY: Grantmakers can measure the return on learning by finding out from staff and grantees how they are using new information and new learning, and how it is affecting their performance. And if you are sharing information with others about replicable practices, who says you can’t find out who’s acting on that information — and how?

MYTH: “We already know everything we need to know.”

REALITY: No you don’t.



MAKE THE CASE

Why Should We Invest Our Time and Resources in Learning?

When talk turns to learning, grantmakers tend to focus on the “how” of it. What kinds of processes do we need to put in place to get better results from learning? How can we engage in learning with other grantmakers?

These are good and important questions, but they tend to steer attention away from the bigger issue: the “why” of learning. To build buy-in and support for learning, and to create a culture and develop practices that stand the test of time, grantmakers need to clarify the connections between learning and their broader mission and goals. Grantmakers also need to frame learning as a means for improvement — both for grantmakers and their grantees.

Why invest in learning? Two main reasons: improved results; and greater accountability and transparency.

Improved results. In the view of Barbara Kibbe, a former foundation executive who now serves as a senior consultant with the Monitor Institute, learning should be a priority for grant-

makers for a simple reason: current efforts to address social problems are not sufficient.

The U.S. nonprofit sector has expanded rapidly in the past 25 to 30 years, with the number of organizations tripling and the number of larger nonprofits (those with revenues of more than \$250,000) growing at a 6 percent annual rate.⁵ Despite this growth, many of the social problems that nonprofits work to resolve have proved difficult, if not impossible, to crack.

While there are a number of reasons for the lack of progress on these issues, it is hard to avoid the conclusion that the sector’s basic operating assumptions need a tune-up. “Organizations of all kinds are in danger of becoming disconnected, rule bound and irrelevant,” Kibbe said. “At the same time, strong, durable efforts — and the knowledge built from experience — can and should make these institutions more and more relevant, not less and less.”

A priority for the sector going forward is to create time and space to reflect and learn so that

5. Thomas J. Tierney. *The Nonprofit Sector’s Leadership Deficit*. The Bridgespan Group. March 2006.

organizations can become more relevant, and more effective. This is the promise of learning across organizations — learning that engages grantmakers and grantees in a collective effort to review current practice and reflect on how to get better results. Among the foundations that have embraced this outward-looking view of learning is the J.W. McConnell Family Foundation. The focus of the Montreal-based grantmaker’s learning activities: sustaining social innovation.

Using an approach it has termed “applied dissemination,” the McConnell Foundation has helped dozens of organizations across Canada share a range of promising social innovations with other communities across the nation. These have included teaching the skills of empathy to young children as a way to reduce bullying and creating social networks for people with disabilities.

In partnership with the PLAN Institute for Caring Citizenship, DuPont Canada and others, the McConnell Foundation also has employed a learning model to the challenge of improving the practice of social problem solving in Canada. Starting in 2002, the partners engaged in what the McConnell Foundation’s Katharine Pearson called an “exploratory conversation” with non-profits about how to accelerate social innovation. In meetings and conference calls, and through support for practitioner discussions on the topic, the effort explored key learnings in such areas as scaling up, tracking progress, the life cycles of social change initiatives, social marketing and complexity theory.

“The idea was to enter this in an open-ended way and without any preconceived notion of where we would end up,” said Pearson. She added that one result of the work — in addition to a publication⁶ — was the launch of a major new initiative to connect research to practice in the area of social innovation. Partners in the Social Innovation Generation initiative include the McConnell Foundation, the University of Waterloo, the PLAN Institute and private-sector partners.

“Organizations of all kinds are in danger of becoming disconnected, rule bound and irrelevant. Strong, durable efforts — and the knowledge built from experience — can and should make these institutions more and more relevant, not less and less.”

— BARBARA KIBBE, MONITOR INSTITUTE

Greater accountability and transparency.

Learning doesn’t just boost philanthropic effectiveness; it also can contribute to an increase in accountability and transparency for grantmakers. In social change work, keeping secrets isn’t cool. And to the extent that a grantmaker is not engaged in tracking and reflecting on what’s being learned — and then acting on those reflections to improve performance — it actually may be undercutting its public mission.

An example of a grantmaker committed to learning as a pathway to greater accountability and transparency is the William and Flora Hewlett Foundation. Hewlett became the first grantmaker to make public the results of the

6. Katharine Pearson, *Accelerating Our Impact: Philanthropy, Innovation and Social Change*. J.W. McConnell Family Foundation. 2007. See <http://mcconnellfoundation.ca>.

Grantee Perception Report conducted by the Center for Effective Philanthropy in 2004. While the report showed that grantees had a lot of good things to say about the foundation, not all of the reviews were positive.

As the foundation's president, Paul Brest, wrote in releasing the report: "Much of the Grantee Perception Report struck my colleagues and me as positive. But, of course, it was the less positive aspects that got our attention and from which we probably have the most to learn."

Among the actions taken by the foundation in response to the report: simplifying the Hewlett grant application in response to grantees saying it was difficult to complete, and strengthening the foundation's communications with grantees through a revamping of the grantmaker's Web site and other steps. (Grantees had given the foundation in general and program staff in particular low marks for their communications with grantees.)

In the Hewlett Foundation case, the grantmaker reflected on what it was learning from grantees and then put its learning into action by adapting its policies, practices and procedures. It is an example of what Monica Blagescu of the UK-based One World Trust called a "stakeholder model" of accountability. According to Blagescu, learning through participatory processes with grantees and those they serve provides grantmakers with the information they need to make sure they are accountable and deliver quality work to the people who count — i.e., those on the receiving end of their grantmaking.

"The reason for being for most grantmaking institutions is public benefit, and real accountability gets at that reason for being," Blagescu said in describing the work of One World Trust,

which promotes education and research on how to make global organizations more responsive to the people they affect.

Blagescu urged grantmakers to set out to learn about their impact from local communities — what's working, what isn't and how to do a better job. "It is about taking into account, being held to account, and giving an account," she said of the approach.

AT A GLANCE: HOW GRANTMAKER LEARNING IMPROVES ACCOUNTABILITY

- **It promotes mutual accountability**, forcing grantmakers to reflect on how their own practices and procedures influence grantee results.
- **It creates space** for grantmakers and grantees to talk more openly about failures, what can be learned from them and how to improve.
- **It increases transparency and trust** by providing staff, board, grantees and other audiences with better information about the organization's work and results.
- **It helps a grantmaker meet its public purpose obligations** by ensuring that lessons from its work are collected, shared, and used to improve future results.
- **It contributes to greater social impact** as nonprofits and grantmakers gain more knowledge and perspective about what works — and what doesn't.
- **It helps grantmakers and nonprofits do their work more efficiently and effectively** by offering easy access to good, actionable data and information.



MAKE IT WORK

How Can We Know What Is Right for Us?

There are countless models out there, countless strategies and activities that various grantmakers have adopted in their efforts to become learning organizations. But simply copying others' work and applying it to your organization is not the answer. Rather, becoming a learning organization starts with a thoughtful assessment of your organization's unique culture, goals and needs.

Anchor it in your mission and strategy. First things first: Learning needs to be anchored to your mission and your core grantmaking strategy. What is it you want to accomplish as an organization — and how will learning help you get there?

Building a learning culture doesn't mean shaking things up in a way that puts off staff and grantees. A 2000 study found that leading companies (such as Apple, Ford and PricewaterhouseCoopers) that have been successful in promoting a strong knowledge-sharing culture did not try to change their culture to fit management's pre-

ferred knowledge management approach. Rather, they built their knowledge management approach to fit their culture.⁷

Among the study's key findings: There is a visible link between sharing knowledge and solving practical business problems among the organizations; and knowledge sharing is tightly linked to a preexisting "core value" of each organization.

The same principle applies to nonprofit as well as for-profit organizations. In other words, learning happens when people see a clear connection to results — i.e., when they understand that learning will produce a clear return for the organization and its grantees in terms of their impact on priority issues. This means grantmakers should frame learning as an integral part of their mission, helping staff, grantees and others understand that the organization's knowledge and learning can be as important as its money in delivering social returns.

7. Richard McDermott and Carla O'Dell. *Overcoming the "Cultural Barriers" to Sharing Knowledge*. American Productivity and Quality Center. January 2000. www.apqc.org.

At the Laidlaw Foundation in Toronto, an interest in getting smarter about learning (via a ramped-up focus on knowledge management) prompted the staff and board to take a harder look at the organization's overall strategy and goals. One result was Laidlaw's first-ever strategic plan, which lists "generate and communicate knowledge" as one of the three pillars of the grantmaker's core business (see story).

Other grantmakers have taken similar steps to ensure that their learning efforts are grounded in their reason for being. Consider the mission of the J.W. McConnell Family Foundation, which includes an explicit commitment to "developing a strong knowledge base for the work that the foundation supports." Similarly, the Barr Foundation in Boston has a tagline that makes learning central to its work: "Using knowledge, networks and funding to build a better Boston for all."

Think about what you want and need to learn. Edward Pauly, director of research and evaluation at the Wallace Foundation, has found a simple question that helps grantees identify their learning priorities: "What is it you don't know that if you did know would make a breakthrough in your work?" (See additional learning questions in "The Art of Powerful Questions".) The same question can work with your staff and board, as well as with other grantmakers, creating the basis for an extended dialogue about what you want and need to learn.

The Whitman Institute recently convened its staff and board, along with 17 grantees, for a weekend retreat designed to explore key learnings from the San Francisco-based foundation's grant-

making. Executive Director John Esterle knew going into the retreat that he wanted to focus the group's attention on a select group of "framing questions." For example, as a committed provider of general operating support for nonprofits, the institute was seeking to spur reflection and discussion around the following question:

How do we capture and communicate the value of general operating support to other funders so that we can be the most effective advocate we can for this position?

In addition, as the Whitman Institute was contemplating a shift to providing multiyear grants, it also wanted to gather grantee input and reflections on that issue. Among the framing questions for the discussion: What are the costs and benefits as a grantee or a prospective grantee for the institute to move into multiyear commitments?

According to Esterle, the retreat is proving invaluable as the Whitman Institute plots its strategy going forward. "The retreat discussions confirmed for us that learning happens through dialogue. It was important for us to be clear about the questions we wanted to explore, but it was equally important that our partners were able to bring theirs as well," Esterle said. "Consequently, we came to a new understanding of one another's experience and points of view. We are all the better for this type of engaged communication, and the evidence of learning will show up over time."

Engage with grantees and others to guide your learning. The Whitman Institute example shows that figuring out what you want and need to learn should not be a solo exercise for your organization. By engaging with grantees and

THE ART OF POWERFUL QUESTIONS

In a 2003 article for the World Café, Eric E. Vogt, Juanita Brown and David Isaacs wrote about the role of profound and powerful questions in spurring productive learning. They presented a list of “generative questions” that can be used to stimulate new learning and creative thinking in a wide variety of situations. Some of these questions follow.

Questions for focusing collective action on your situation:

- What question, if answered, could make the most difference to the future of (your specific situation)?
- What’s important to you about (your specific situation) and why do you care?
- What are the dilemmas/opportunities in (your specific situation)?
- What do you know so far/still need to learn about (your specific situation)?
- What assumptions do you need to test or challenge here in thinking about (your specific situation)?
- What would someone who had a very different set of beliefs than you do say about (your specific situation)?

Questions for connecting ideas and finding deeper insight:

- What’s taking shape? What are you hearing underneath the variety of opinions being expressed? What’s in the center of the table?

- What’s emerging here for you? What new connections are you making?
- What had real meaning for you from what you’ve heard? What surprised you? What challenged you?
- What’s missing from the picture so far? What is it you’re not seeing? What do you need more clarity about?
- What has been your major learning, insight or discovery so far?
- What’s the next level of thinking you need to do?

Questions that create forward movement:

- What would it take to create change on this issue?
- What could happen that would enable you to feel fully engaged and energized about (your specific situation)?
- What needs your immediate attention going forward?
- If your success was completely guaranteed, what bold steps might you choose?
- How can you support each other in taking the next steps? What unique contribution can you each make?
- What challenges might come your way and how might you meet them?
- What seed might you plant today that could make the most difference to the future of (your situation)?

Eric E. Vogt, Juanita Brown and David Isaacs. *The Art of Powerful Questions: Catalyzing Insight, Innovation and Action*. Whole Systems Associates. 2003. www.theworldcafe.com.

MAPPING YOUR ORGANIZATION'S LEARNING AGENDA: FOUR QUESTIONS

As you set out to identify your organization's learning needs and goals, here are four questions to guide staff, board and grantee conversations:

1. What have been the biggest "ahas" in your work?
2. What have been your biggest failures — and how did you arrive at them?
3. What issues/problems do you continue to struggle with, no matter how hard you try to "solve" them?
4. What kinds of learning and information would help your staff do a better job? Your grantees? The field you work in?

other funders who share your goals and interests, grantmakers can leverage the expertise and the perspectives of others to develop the framing questions that will lead to true learning.

Another grantmaker that is committed to tapping into outside perspectives to guide its learning is the Grable Foundation in Pittsburgh. For example, Grable and two other Pittsburgh foundations recently joined together to host a series of dinners for local nonprofit leaders to develop ideas for advancing the community.

"I encourage our program staff to bring people together not to waste their time but to engage with them in good and creative thinking," said Grable Executive Director Gregg Behr. "This work isn't rocket science; it is a matter of connecting with people and good ideas."

It is also a matter of reaching out to the community for input about the foundation's program and approach. The Grable Foundation currently is in the process of convening a Community Cabinet — a group of leaders whose missions focus on the well-being of kids. These agency leaders will meet up to three times a year to help the foundation think through opportunities and its role in advancing the field in the community.

Grable's goals in embarking on outreach efforts such as the Community Cabinet include breaking down the power imbalance that so often gets in the way of productive grantmaker-grantee relationships. "Ultimately, if we are going to do good grantmaking, we need to have a candid relationship with grantees so they feel comfortable raising challenges they face in the organization or troubles they may encounter — so they don't feel hindered in revealing things," said Behr.

Case Study

PLANNING FOR LEARNING: LAIDLAW FOUNDATION

Toronto, Ontario

As part of a 50-year history of learning for improvement, the Laidlaw Foundation embarked on an organizational review that identified two potential areas for change: increasing synergy across programs and improving communications.

In response to this, in March 2006 the foundation hired Michelle Brownrigg as its first dedicated knowledge manager. The hiring decision reflected a determination among the foundation's leaders to get smarter about sharing learning and knowledge about how best to help young people succeed.

“There was an interest here in learning as much as we could about this topic and about how to influence youth development in a positive way,” Brownrigg said. Another motivation was to use the foundation's learning to influence policies affecting young people.

The first challenge that needed to be addressed in strengthening the learning focus in the foundation's work involved the development of an organization-wide strategic plan. Previous plans had been linked to specific programs and were not organization-wide.

Brownrigg supported staff and board with this process. “It's not where I thought I would start my area of work” she said, “I was first focused on how I could help with connecting learning across programs. But setting organization-wide goals and objectives was identified as something that needed to happen first, and so that's what we did.”

Laidlaw's interest in improving how it gathered and shared knowledge — combined with the new, organization-wide focus on youth development — had forced board and staff leaders to take a harder look at the organization's broader goals.

Now, in addition to articulating the new focus on young people, the Laidlaw Foundation's strategic plan lists “generate and communicate knowledge” as one of three pillars of the grantmaker's core business. A companion knowledge management plan lays out some of the processes and tactics the grantmaker intends to employ.

Of course, a plan is just a plan, and the true test of Laidlaw's new commitment to learning and knowledge sharing will be what happens next.

Continued on page 22.

Continued from page 21.

Brownrigg admits it has been a challenge for everyone to come together about the foundation's learning goals. She noted the resistance to the types of metrics generally associated with traditional forms of evaluation, which were considered in some ways to be too academic to assess the community-driven work Laidlaw supports

“People here don't like all the boxes and jargon that can come with some evaluation approaches. They think these types of evaluation miss out on important qualitative elements of learning.”

Instead, the staff embarked on a learning project. The foundation hired two outside researchers to conduct a series of interviews and focus groups designed to generate new knowledge about youth organizing. This work was done with a multi-stakeholder advisory body. While this sometimes made the process challenging, it also ensured the learning was grounded in the perspectives of not just funders but also community advocates.

The research set out to identify the kind of infrastructure that needs to be in place for youth-organizing efforts to succeed. The results informed Laidlaw's planning and budgeting for the 2008 fiscal year.

“Having a learning project helped to bring everyone to the table and helped to convey to everyone that my role here was to support them in this work,” Brownrigg said.

While the results of the foundation's early learning work are still emerging, the staff and board are confident that the knowledge gained from the research effort will contribute directly to improved practice, both at the foundation and among its grantees.

“‘Learning for what?’ is the big issue here — this team wants actionable information that people will use in their daily work,” Brownrigg said.

Lessons Learned

- Start with learning when embracing a new priority.
- Anchor the learning effort in your organization's strengths and strategic plan.
- Don't make it too academic— avoid jargon, seek deeper, qualitative learning.
- Ground it in a learning activity that shows early results.

For more information: www.laidlawfdn.org.

How Can We Get Started?

While it's always tempting to want to make big changes at the outset, most grantmakers that have implemented learning efforts say a “small steps” approach is the way to start. Not only will you want to take time to figure out what works best for your organization and its grantees, but you will also want to tamp down concerns that you're launching a new time-draining and resource-intensive endeavor.

Conduct a knowledge audit and/or needs assessment. Effective learning is founded on strong systems for capturing and disseminating information. In other words, it is hard to engage in the reflective practice of learning if your organization can't produce good information and data to guide discussion and action. One of the first steps toward becoming a learning organization is therefore to develop a better understanding of your organization's existing store of knowledge and learning, as well as how knowledge is shared among staff and with the outside world.

At the NewSchools Venture Fund, a San Francisco grantmaker working to “transform public education,” the seeds for a wide-ranging learning initiative were sown with the launch of a needs assessment in 2002 (see page 26). In addition to interviews with NewSchools staff, as well as outside advisors, the assessment entailed a comprehensive investigation of the organization's existing systems for categorizing knowledge — from what was stored in office file cabinets to the content of officewide computer networks and the hard drives of individual users.

“We started by getting clarity on why learning was important to us and wanted to make sure we could find a system that fit with the way we already worked,” explained Julie Petersen, communications director with NewSchools.

Make it everyone's job to advance learning.

A commitment from the top is key to the success of an organizational learning effort. At the same time, however, it's important to anchor the learning function in an individual or a team. CEOs can work with staff who are charged with the learning, communications and/or IT functions to build learning into the formal structure of the organization, from the way in which grants are reviewed to the conduct of staff and board meetings to the preparation of board write-ups and procedures for staff evaluation.

The Atlantic Philanthropies, for example, has a Strategic Learning and Evaluation team that was created expressly to develop evaluation techniques, encourage learning from foundation and grantee experiences, and facilitate dissemination of that learning. At smaller grantmaking organizations, the responsibility for implementing the learning vision may fall on a communications staff member or program officer.

Anchor learning in current practice. Grantmakers who are working to advance learning among staff and grantees say that one of the main barriers they face is the perception that this is an add-on activity and will take too much time and money.

AT A GLANCE: GETTING STARTED

- **Figure out what will work for you.** Use staff interviews, a knowledge audit and/or needs assessment to determine your organization's unique learning goals and needs.
- **Start from where you are now.** Find ways to integrate learning into existing staff work processes, board-staff interactions and relations with grantees.
- **Build learning into the organization's DNA.** Fasten it to your mission, and make it a part of the strategic plan and communications and technology planning.
- **Provide incentives for staff to engage in learning.** Write it into job descriptions and annual goals and performance assessments.

“You read all the articles about organizational learning, and it can be overwhelming,” said Carrie Boron of the Study Circles Resource Center, a project of the Paul J. Aicher Foundation. “But then you realize that learning is at the core of a lot of things you already do. And what’s next is to take better advantage of the activities and the structures that you already have built into your organization to make learning happen.”

Boron advised grantmakers against the belief that embracing a learning focus automatically means adding new layers of work or technology to what’s already there. Rather, she said the key is to “connect things better for the staff.”

From staff meetings and grantee workshops to the foundation Web site and annual report, most grantmakers already are engaged in numerous activities that reflect a commitment to learning and knowledge sharing. By identifying these activities, elevating them in the context of learning and connecting them to the organization’s broader learning goals, grantmakers can lay the groundwork for a stepped-up commitment — and greater impact.

An important focus for the Lumina Foundation as it set out to become an effective learning organization was the use of existing tools and resources for advancing learning among the staff. According to Indira Anand, director of information technology with the Indianapolis-based grantmaker, the foundation made a deliberate choice to introduce “nothing magical, nothing new even.” Rather, Lumina began by providing training for staff in how to use current systems, including Microsoft Office and Sharepoint, to simplify the sharing of information. “An ongoing review of processes and practices at all levels has helped us identify opportunities for continuous improvement,” Anand said. “This participative process has been key in embedding learning and adaptation into the culture.”

Similarly, at the KnowledgeWorks Foundation (tagline: “Empowering Communities to Improve Education”), foundation leaders built buy-in for a new knowledge strategy by showing staff how knowledge management could help them solve problems and enhance their own efficiency on the job. In workshops, staff teams identified their needs for sharing knowledge, while receiving training in how to use Web-based tools

such as Sharepoint, the foundation's knowledge management portal.

At KnowledgeWorks, the focus was on the needs of the end user and connecting staff to people and information that could help them work

better. One lesson from the foundation's work, according to Matthew Barcus, senior manager of technology and Web services, is that knowledge sharing should be built into staff's daily work.

MARKETING YOUR KNOWLEDGE

Why has philanthropy done a less-than-stellar job of sharing its knowledge both inside and outside the field? One reason, according to the consultants at Williams Group, is a focus on dissemination at the expense of what they call "knowledge marketing."⁸

In a paper prepared with the support of the David and Lucile Packard Foundation, Williams Group argues that grantmakers should focus their knowledge-sharing efforts on the needs and interests of the end user, and on how the knowledge that grantmakers produce can and should inform real action.

"Effective efforts treat knowledge less as an end in itself and more as a means to improved practice," according to the paper. It goes on to describe a six-step framework for knowledge marketing, as follows:

1. **Define the problem or need.** What practitioner problem, need or question are you addressing? Why is it significant?

2. **Identify, segment and research the market for your knowledge.** What groups of users will use your knowledge?
3. **Develop use objectives.** What do you want target users to do differently as a result of this knowledge?
4. **Develop a process through which your knowledge will be used.** What methods will help you achieve your objectives?
5. **Develop your knowledge products.** How should you frame, focus and package the content of the knowledge you are sharing to achieve your objectives and reach your target market?
6. **Assess your progress.** How will you assess whether your knowledge has been used and objectives have been accomplished?

8. *Marketing Your Knowledge: A Report to Philanthropy's R&D Organizations*. Williams Group. 2003. Available at www.geofunders.org.

Case Study

BUILDING INTERNAL CAPACITY FOR LEARNING: NEWSCHOOLS VENTURE FUND

San Francisco, CA

The NewSchools Venture Fund raises funds from individual investors and foundations to support the goal of helping all children learn. Helping the organization itself learn better was the focus of a round of soul-searching by NewSchools' leaders in 2000 and 2001.

“We realized we needed to be more intentional about the impact we were creating,” said Julie Petersen, communications director with the San Francisco organization. “We wanted to do a better job capturing and codifying what we were learning and sharing it with the broader field.”

In support of the organization's new learning goals, NewSchools received a two-year, \$300,000 grant from the Annie E. Casey Foundation. NewSchools used the funds to hire a full-time project manager and launch a systematic, strategic approach to the design and implementation of a wide-ranging Knowledge Management Initiative. The work proceeded in several phases:

Planning: The project manager began planning the initiative by defining milestones, timeline and budget. Among the goals and activities outlined in the plan: capture and codify organizational knowledge, improve internal knowledge management processes and systems, and share and reuse knowledge. A key deliverable for the initiative, it was decided, would be a knowledge management software solution.

Analysis: This phase included a needs assessment based on interviews with and surveys of NewSchools' team members and key advisors. The process took about two weeks and began with a comprehensive review of the organization's existing systems for categorizing knowledge. During this phase, the project manager also began to explore knowledge management software solutions by meeting with other organizations that had undertaken knowledge management initiatives. In addition, the project manager hired a communications and special products manager to support the initiative.

Implementation and deployment: In early 2003, NewSchools purchased and installed new knowledge management software from Intraspect and rolled out the new system to users. The entire NewSchools team received several hours of training on the processes and taxonomy of

the new system, code-named Apollo. Each user “populated” the new system with e-mails, Word documents, PowerPoint and Excel files, and other knowledge from their own computers.

Support: Today, users have incorporated Apollo into their regular work routines. The project manager monitors the use of the system and continues to refine the taxonomy and load additional data.

A key feature of the Intraspect system, according to Petersen, is flexibility. “There are lots of options for getting information into and out of the system, including by e-mail. It’s become the backbone of how we work as an organization,” she said.

The new system, Petersen added, has improved the organization’s grantmaking by facilitating access to actionable information about how to achieve the NewSchools’ mission. The expectation that “everything lives there,” she added, has enhanced the appeal of the system as the go-to resource for documents and data that can help the NewSchools team in its daily work.

As one Apollo user observed: “The information is well organized, so I feel like putting a document into the system isn’t futile. It will be found, used, updated and repurposed.”

In addition, Apollo has become the foundation for a broader effort to build a learning culture within NewSchools. From weekly news bulletins that keep team members informed about key trends to a NewSchools Book Club that meets monthly to talk about books and reports that are relevant to the organization’s mission, NewSchools is working to make sure its work processes are characterized by reflection, transparency and the sharing of information.

Lessons Learned

- Start by getting clarity on why learning is important to your organization, and ground the initiative in the way you work.
- Choose a system with multiple approaches to uploading and downloading information.
- Develop a set of cultural expectations around the use of the system — e.g., “everything lives here.”
- Don’t stop with technology. Build a learning culture where information sharing and transparency become the norm.

For more information: www.newschools.org.

How Can We Build a Culture That Embraces Learning?

The ultimate goal of any learning effort should be to build a culture where learning becomes the norm, where it is embedded in the day-to-day work of the entire organization. That takes a top-down commitment to learning, plus a commitment to create time and space for learning.

Make a commitment from the top. “Learning that leads to improvements in knowledge and practice doesn’t usually happen by accident” according to the authors of the 2005 report, *Learning for Community Change: Core Components of Foundations That Learn*. They added: “Most often, learning occurs because a foundation’s leaders have a clear, consistent commitment to making it happen.”⁹

Making a commitment from the top doesn’t just mean issuing soapbox appeals about the importance of learning. It means making sure staff are empowered and encouraged to make learning a part of their daily work.

“All the incentives need to be lined up in the direction of learning, and that’s power that’s typically not delegated to a director of organizational learning or evaluation,” said Tom David, senior strategist with the Community Clinics Initiative, a joint project of the Tides Center and the California Endowment.

What kind of incentives promote learning? The Girl’s Best Friend Foundation in Chicago made it part of job descriptions that staff should be visible and accessible to colleagues and grantees and serve as a resource for the broader community.¹⁰ Other steps to consider: professional development objectives and/or learning goals for staff, changes in performance measures, and incentives for staff to engage in learning such as staff development accounts.

“Foundation leaders must ... create a culture where learning is rewarded and staff have the time and resources to monitor current initiatives and make midcourse corrections.”

— FROM *INSIGHT TO ACTION: NEW DIRECTIONS IN FOUNDATION EVALUATION*, FSG SOCIAL IMPACT ADVISORS, 2007

Create time and space for learning. “The tyranny of getting grants out the door must give way to processes and time and space to share and reflect on learning,” said Martha Campbell of The James Irvine Foundation.

At Irvine, Campbell added, learning is an integral part of program staff and board meetings. The

9. See footnote 3.

10. Grantmakers for Effective Organizations. *Leveraging What You Know: Knowledge Management Strategies for Funders*. 2004. www.geofunders.org.

board, for example, has made it clear to staff that they do not want to hear a “sales job” about current grants at every meeting but rather a more reflective discussion of what staff are learning and what concerns them.

“This is now a normal part of board-staff interaction. It’s not so much about the process as about the culture,” Campbell said.

It’s also about time. “Reflecting on results and identifying meaningful lessons and course corrections require significant, intentional time,” said Fay Twersky of the Bill & Melinda Gates Foundation.

One grantmaker that is carving out time for staff to learn is the Annie E. Casey Foundation, where staff participate in “midyear review” meetings designed specifically to advance learning. The most recent set of reviews included three sessions lasting up to six hours each. During the sessions, as many as 75 people engaged with top program staff in key portfolio areas around three questions:

1. What are we learning?
2. How are we learning what we’re learning?
3. How are we sharing what we’re learning with audiences we want to influence and support?

“This is a huge investment, getting all of these people to devote this kind of time, and the reason it works is that the leadership here actively encourages people to take part,” said Tom Kern formerly with Casey. He added that the midyear reviews have “lifted people out of the silos we’re all involved in and delivered learning and insights that can be transferred to our own day-to-day work.”

ENCOURAGING EVALUATIVE THINKING

Consultant and author Michael Quinn Patton has some advice for grantmakers seeking to build a learning culture within their organizations and among grantee and funder networks. Encourage “evaluative thinking,” he says.

As defined by Patton, evaluative thinking is based on the premise that evaluation should not be a one-time event but ongoing. He has advanced a concept referred to as “developmental evaluation,” which is a team-based process that engages evaluators, grantmakers and grantees in an ongoing, rather than one-time, assessment of the work being done. The goal: to use information and data collected in real time to inform decision-making and continuous improvement.¹¹

11. Michael Quinn Patton, “Evaluation for the Way We Work,” *The Nonprofit Quarterly*, Spring 2006; Grantmakers for Effective Organizations, *Evaluation as a Pathway to Learning*, 2005, www.geofunders.org.

How Can We Learn From Our Failures?

Mistakes happen. In philanthropy as in any other endeavor, people screw up. However, while leaders in the corporate sector often tout the power of learning from mistakes, the nonprofit world has a different attitude about failure. Resources are spread too thin, the job of strengthening communities or supporting children and families is too important, to allow people even to consider the possibility of a megaflop, a dud.

Grant Oliphant, vice president for programs and planning with the Heinz Endowments, believes the field of philanthropy needs “a philosophy of failure.” He says the field’s emphasis on accountability, metrics and performance (for grantmakers and grantees alike) can be a double-edged sword. Yes, it promotes improvement and better grantmaking, but it also can “drive distortion” as people set out to avoid and/or cover up mistakes.

Which raises an intriguing question posed by Oliphant: “How can the field become more risk embracing in an atmosphere that places us on a higher accountability plane?”

K.C. Burton, referring to his work at both the Louisiana Disaster Recovery Foundation and the Annie E. Casey Foundation, said grantmakers need to “create space to make mistakes in their work” — in part, by embracing experimentation.

In Baltimore, Burton said, the Casey Foundation’s early experience (and mistakes) with an initiative aimed at improving outcomes for children prompted the grantmaker to rethink its take-charge approach to targeted neighborhoods. “We had to accept that we would lead with

money and not ideas,” he said, adding that the foundation is now learning in partnership *with* the community.

Kathryn Merchant, president and CEO of the Greater Cincinnati Foundation, recalled that her foundation had “almost no risk profile” when she joined it in 1997. Rarely had it committed major funding in a focused way to address substantive issues facing the community.

After Merchant came on board, the foundation began taking a few more chances, chiefly by stepping into a leadership role in a number of initiatives to strengthen the local and regional economy. However, none of the initiatives panned out in ways the grantmaker had hoped, prompting Merchant and her colleagues to go back to the drawing board. And in the same way that Casey learned from its mistakes about the importance of a more humble, less controlling approach to grantmaking, the Greater Cincinnati Foundation now views itself as just one partner among many in local and regional economic development.

“We’re giving it one more shot. All that went wrong is helping us see what *not* to do,” said Merchant, noting that the foundation has written a permanent activity into its strategic plan called “Learn and Grow.” “This lets us be up front about our mistakes, and it means we have the board’s permission to act in this way.”

Reflecting on some of the failures in which his own employer had been involved, Oliphant said a successful philosophy of failure — for individual grantmakers and the field as a whole

LEARNING FROM THE U.S. ARMY: AFTER ACTION REVIEWS

Experts on organizational learning regularly point to the U.S. Army's After Action Review process as a model in how to use learning to get better results. The basic idea: to convene staff and others for an in-depth look at what worked in the course of an initiative, what didn't work and why.

Signet Research & Consulting, LLC, has developed a framework for organizational learning that adapts the Army's methods for other organizations. The Signet approach, which is founded on an exploration of an organization's (or team's) intended vs. actual results, includes both a Before Action Review and an After Action Review. Among the key questions to ask are the following:

Before Action

- What are our intended results and measures?
- What challenges can we anticipate?
- What did we/others learn in similar situations?
- What do we think will make the biggest difference this time?

After Action

- What were our intended results?
- What were our actual results?
- What caused our results?
- What will we sustain/improve?

For more information: www.signetconsulting.com.

— entails balancing several “opposite truths.” Among these: “We need to embrace failure” and “We should not glorify failure.”

Grantmakers, Oliphant explained, need to remember that failure has real costs for the organizations and the communities involved. Philanthropy needs to accept that taking risks is an integral part of the work of social change.

But at the same time, “You don't get a bye because you are learning,” he noted.

In other words, embracing a philosophy of failure doesn't stop with publishing a lessons learned report in which you own up to your mistakes. Grantmakers also need to own up to the consequences of their mistakes — and then take the risk of trying to set things right.

How Can We Make Sure We Are Learning With and From Our Grantees?

A lot of the current discussion of learning in philanthropy focuses on learning for grantmakers. But what about grantees? How can grantmakers engage their grantees as partners in learning?

One obvious answer is by making space at the table for grantees as grantmakers seek to draw lessons from their work. Each year, The Forbes Funds in Pittsburgh convenes 20 or more nonprofit leaders (grantees and nongrantees alike) for a series of freewheeling discussions

LEARNING WITH/FROM GRANTEES: WHAT WORKS

- Grantee perception surveys (like those offered by the Center for Effective Philanthropy)
- Learning communities/learning circles
- Grantee participation in board/staff meetings
- Site visits with grantees for foundation board, staff
- Collaborative approaches to evaluation
- Grantee participation in strategy development/program design
- Capacity-building support for grantees' learning efforts
- An honest, open grantmaker-grantee relationship

of urgent issues in the sector, as well as key management topics such as board development. The program, called “Conversations,” was established in 2004 as a convening space for grantmakers and grantees. As a grantmaker with an emphasis on nonprofit capacity building, The Forbes Funds views the sessions as a source of invaluable insight into the day-to-day challenges and needs of the Pittsburgh area’s nonprofit executives.

“It’s a safe environment for people to connect and learn from each other, and for us as a funder to grant smartly because we know what’s really

happening in the field,” said Vivien Luk, community resources officer with The Forbes Funds.

Another grantmaker that is dedicated to learning with grantees is the Mary Reynolds Babcock Foundation. According to Senior Program Officer Gladys Washington, the Babcock Foundation’s staff consider themselves “learning partners” with grantees, regularly engaging in learning circles and similar gatherings to reflect on their work and how to get better results.

The grantmaker’s emphasis on learning with grantees, Washington added, has helped it stay effective and relevant to the communities it serves in the southeastern United States. For example, when the foundation engaged in learning circle conversations with grantees about what kind of support they needed to become more effective, the top answer was capacity building. Today, support for organizational development has become a key facet of the foundation’s grantmaking.

The work of The Forbes Funds and the Babcock Foundation shows a belief in the role of “learning communities” in improving the flow of information and learning among grantmakers and their grantees. As defined by Kim Ammann Howard, director of evaluation and organizational learning at BTW Informing Change, a learning community is “a group of individuals who come together over time in a specific space or environment to build their mutual knowledge and understanding through interactions that add value to their work.”¹²

12. Kim Ammann Howard. “Designing Learning Communities for Enhanced Impact.” GEO E-newsletter LEARNING. February 2007. www.geofunders.org.

Engaging with grantees in a well-designed learning community can enhance grantmakers' impact, Howard said. It can result in more open, honest conversations with grantees about their progress, challenges and needs, while providing a source of regular input and feedback to inform foundation planning and decisions.

Howard identified a number of key design elements for a successful learning community. For example, grantmakers should work with participants to identify a clear rationale for the group — i.e., how is it unique and how will it add value to everyone's work? In addition, she recommended the involvement of a strong, third-party facilitator who can play a neutral role to ensure group-generated expectations, maintain an environment conducive to learning and keep the group moving forward in reaching its goals.

Convening learning communities, according to Jack Chin at Blueprint Research and Design, Inc., is part of a move on the part of many grantmakers to develop “more reciprocal relationships” with grantees. He wrote as follows:

Rather than the “fewer, bigger grants” approach, funders might take a “give more to get more” approach that enables their grantees to develop denser relationships, which then leads to greater impact at the field level. Supporting multiple grantees in this way with an additional investment of resources (above and beyond grant dollars for project or core operating support) offers the possibility of achieving better results.¹³

AT A GLANCE: LEARNING WITH GRANTEES

- **Create space at the table for grantees** as you engage in reflective conversations about urgent issues in your grantmaking areas, what's working and what isn't.
- **Ask grantees how you are doing as a grantmaker**, which grantmaking practices support nonprofit results, and which practices get in the way.
- **Work to build grantee capacity for evaluation and learning** through direct capacity-building support and collaborative efforts to nurture “evaluative thinking.”
- **Make sure the information and data you're asking grantees to compile is useful** to inform (and improve) grantee practice.

Yet another way to engage grantees in learning is to create better systems for gathering grantee feedback about your organization's grantmaking. The GEO publication, *Listen, Learn, Lead: Grantmaker Practices that Support Nonprofit Results*, summarized some of the ways in which grantmakers are tapping the collective pulse of their grantees — and using the information to strengthen their work.¹⁴

13. Jack Chin. *The Power of Learning: Funders and Grantees Getting Smarter Together*. Blueprint Research & Design, Inc. February 2006. www.blueprintrd.com/text/power.pdf

14. www.geofunders.org.

Case Study

LEARNING WITH GRANTEEES: DEACONESS FOUNDATION

St. Louis, Missouri

At the Deaconess Foundation, the commitment of the board and staff to learning stems from a deep-rooted desire to understand the grantmaker's impact on the St. Louis community it serves.

“We want to make sure we are fulfilling our health and wellness mission, so that causes us to ask a lot of questions about how we're doing, and how we can do a better job,” said Elizabeth George, vice president of the health conversion grantmaker.

Learning took on added importance with Deaconess's embrace of a new grantmaking focus: capacity-building support for a limited number of grantees. With the Deaconess Impact Partnership launched in 2004, the grantmaker is working to strengthen the operations and leadership of eight exemplary child-serving nonprofits in the St. Louis region. As of July 2007, the organizations had received more than \$5 million in capacity-building support for everything from strategic planning, peer-based learning and board development to technology and leadership training.

From the start of the new initiative, the grantmaker knew that evaluation and assessment were going to be key to drawing lessons about what was or wasn't working. As a result, Deaconess commissioned the capacity-building consultants at TCC Group to help evaluate how the participating organizations were progressing.

The evaluation effort is grounded in an initiative-wide logic model, as well as a logic model developed with each of the participating organizations. To keep track of the impact of the effort on the organizations, TCC is using its Core Capacity Assessment Tool, which the organizations complete at six-month intervals, plus site visits and other assessments.

“We knew that if we were going to go in this new direction, then we wanted to do it right,” said George.

Beyond the formal evaluation effort, George said the Deaconess staff also are gaining a significant amount of knowledge and perspective because of the focused nature of the grantmaking work. “There are things we are learning from these organizations just

because we are so embedded with them and are living and breathing this every day,” said George.

She encouraged other grantmakers to pay attention to both gut and formal learning as they seek to draw lessons from their work with grantees. “A big part of it is establishing the type of relationship where grantees are willing to share with you, even if that means talking about what’s not working,” George said.

Deaconess plans to begin working with a second round of impact partners in 2008. George said the insights gained during the initial phase of the partnerships have proved invaluable in improving the effort. “We’re using all the information we can find from our evaluation and from conversations with executive directors about how it’s going, what’s working and what isn’t,” she said. The goal: to refine the partnership program and develop better criteria for grantee selection and better strategy.

“We know there are things we need to do differently,” George said. “Our goal is to use what we’re learning right away to improve the program.”

Lessons Learned

- Frame learning as a core component of your grantmaking mission.
- When appropriate, use logic models to link evaluation to real outcomes.
- Build staff and grantee capacity for evaluation.
- Nurture relationships so people are comfortable sharing good and bad news.
- Use learning to refine strategy and approaches.

For more information: www.deaconess.org.

How Can We Build the Learning Capacity of Grantees?

In addition to convening and participating in learning communities with grantees, grantmakers can advance the cause of grantee learning through focused capacity-building support. An emerging priority for many grantmakers is building evaluation capacity among grantees.

Recognizing that evaluation is not simply a matter of documenting the output and outcomes of nonprofits' work, many grantmakers now view it as a learning tool for grantmakers and grantees alike.¹⁵ In the view of Teresa Behrens of the W.K. Kellogg Foundation, "a critical area that is neglected is how to build grantee capacity to use evaluation data for learning." That's why Kellogg provides technical assistance on evaluation to its grantees, through such tools as the *W.K. Kellogg Evaluation Handbook* and the *Logic Model Development Guide*.¹⁶

To get a better handle on exactly what it means to build evaluation capacity among nonprofits, the National Science Foundation convened a group of evaluators, academics, capacity builders and grantmakers in October 2006. Among the key words of grantmaking advice to emerge from the convening: Provide direct support to grantees to support their evaluation efforts, and make sure the data they are generating can

inform their activities and help them address challenges they experience in their daily work.¹⁷

Ricardo Millett, former president of the Woods Fund in Chicago, also stressed the importance of making evaluation useful for grantees. He said that he and his grantmaking staff regularly found that grantees' interest in evaluation was considerably higher when they saw that the process — and the results — would help inform their own work. Millett recommended a collaborative approach to evaluation, with grantmakers and grantees working with those impacted by an organization's work to "use evaluation to improve organizational effectiveness."¹⁸

At The Atlantic Philanthropies, staff work closely with grantees to make sure that evaluation efforts are tailored to helping them meet their objectives. "We try to promote a culture of learning and discussion in the fields we fund with a focus on effective ways to achieve objectives we share with groups of grantees," said John Healy, director of strategic learning and evaluation. "It is vital that the evaluations provide insightful, practical, timely feedback that informs thinking. This should never be seen as part of a funder compliance process but as valuable for the work. The best use of evaluation is when it sparks strategic discussions among

15. *Evaluation as a Pathway to Learning*. GEO. 2005. www.geofunders.org; and Mark Kramer, *From Insight to Action: New Directions in Foundation Evaluation*. FSG Social Impact Advisors. 2007.

16. www.wkkf.org.

17. Jennifer Bagnell Stuart. *Musings on a Think Tank for Innovation Capacity Building*. Innovation Network. 2006. www.innonet.org.

18. Ricardo Millett. "The Change Equation: Partnering for Improved Learning Effectiveness." GEO E-newsletter LEARNING. November 2006. www.geofunders.org.

groups of nonprofits on common opportunities or challenges they face.

“If we frame evaluation correctly and align it with the mission of the organization, nonprofits see it as useful because it informs their work,” Healy continued.

In the same way that learning communities can elicit new perspectives and insights on urgent issues facing nonprofits, a collective learning approach also can advance grantmaker and grantee learning about the practice of evaluation. That was the goal of the Rochester Effectiveness Partnership. Launched in 1996 as a collaboration of the Bruner Foundation and other funders, together with nonprofit service providers and evaluation professionals, the initiative was designed to build the partners’ understanding and use of evaluation as a pathway to improved organizational results.

The idea behind the partnership, according to Beth Bruner, director of effectiveness initiatives with the Bruner Foundation, was that it’s not enough to try and make grantees “better” at evaluation; grantmakers and grantees can learn to “think evaluatively” together.

Using the term “evaluative learning,” Peter York advanced a similar view in *A Funder’s Guide to Evaluation*, published by GEO and the Fieldstone Alliance. York cited the example of the Howard Hughes Medical Institute, which launched a pilot project designed to improve the

evaluation capacity of grantees. In a peer-to-peer learning model, 12 grantees shared feedback and insights on each other’s evaluation methods and tools. As a result of the Peer Evaluation Cluster Project, most participants felt they “better understood the importance of using ongoing evaluation to continue learning and make mid-course corrections,” York wrote.¹⁹

York and his colleagues at the TCC Group have advanced a “Community of Learners” approach to evaluative learning. What’s different about the TCC approach is the direct involvement of nonprofits in the design and/or implementation of an evaluation process. The ultimate goal: to build nonprofit staff capacity around evaluation.²⁰

“If we frame evaluation correctly and align it with the mission of the organization, nonprofits see it as useful because it informs their work.”

— JOHN HEALY, THE ATLANTIC PHILANTHROPIES

19. Peter York. *A Funder’s Guide to Evaluation: Leveraging Evaluation to Improve Nonprofit Effectiveness*. Fieldstone Alliance/GEO. 2005.

20. Chantell Johnson. *Creating a Community of Learners: Successful Evaluative Learning for Nonprofits and Funders*. TCC Group. www.tccgrp.com.

GEO EXPERIMENTING WITH NEW PEER-TO-PEER LEARNING APPROACHES FOR GRANTMAKERS

In 2007, a group of nine GEO members gathered in Washington, D.C., for two days to share learning and experience around the question, “How can we sustain seasoned nonprofit leaders?” The discussions were organized around the theory of emergent learning, or EL Maps™, which provide a common structure and language for peer-to-peer learning.

Pat Brandes, senior advisor with the Barr Foundation, was skeptical at first. “I resist spending time doing anything but doing,” she said. “And this sounded like too much process, not enough doing.” Brandes also was skeptical about applying EL Maps to the work of disparate organizations with disparate agendas and goals.

However, by the start of the second day, Brandes said she became a convert. As the group began to develop hypotheses about how leadership development programs for senior executives can benefit nonprofit organizations as a whole, Brandes began compiling a to-do list for when she got back home.

“Within 30 minutes, we had 13 impactful actions we were going to take,” Brandes said of the work she and her colleague did in the learning group. Among the actions taken by Barr because of the process: an evaluation of the secondary benefits of its sabbatical programs for nonprofit leaders, and new training for interim leaders who take the helm while the top executives are away.



Basic Structure of an EL Map™

EL Map™ is a trademark of Signet Research & Consulting, LLC. For more information: www.signetconsulting.com.

Another participant in the group was Annemarie Riemer, director of the Nonprofit Support Program at the Hartford Foundation for Public Giving. Like Brandes, she wondered whether the process would lead to tangible results.

“I wasn’t so sure that hearing about other kinds of leadership programs would be helpful,” she said. However, the discussions led to a number of changes in the Hartford grantmaker’s programs. For instance, after hearing about how other grantmakers make a point of honoring participants in their programs, the Nonprofit Support Program now asks the president of the foundation to hand out certificates to graduates of the grantmaker’s Executive Management Institute. It’s a small shift, but a meaningful one.

Marilyn Darling, founding partner of Signet Research & Consulting, LLC, developed EL Maps in an effort to develop a more robust approach to peer-to-peer learning in the private sector. Now she is working with GEO to apply the approach to philanthropy. Among the key elements of EL Maps, Darling said, are a provocative “framing question” that engages all members of the group and the development of clear action plans that commit participants to putting their learning to work.

“Even though some foundations had modeled their own programs on others in the room, everyone had something to share, and everyone had something to learn,” Darling said of the GEO group. “In addition, each organization identified specific actions they could take based on this new shared theory of success to improve their individual programs.”

For more information on EL Maps and GEO’s work on peer-based problem solving:
www.geofunders.org.

How Can We Learn With Other Grantmakers?

Collaborative approaches to learning should not be limited to your grantmaking organization and its grantees. Recognizing that grantmakers collectively face many of the same challenges and conundrums in their day-to-day work (from accountability pressures to questions about how best to support nonprofit effectiveness), many are saying that the field of philanthropy needs to do a better job of learning together.

GEO asked attendees at its 2005 knowledge management conference what were the next steps the field needs to take to improve learning practices. By far the greatest cry was for opportunities for grantmakers to share learning with one another and effective models to facilitate collective learning. Since then, GEO has been piloting peer-based problem-solving methods for grantmakers (see page 38), including a process called “emergent learning.” The goal is to create opportunities for small groups of grantmakers to collaborate in forging solutions to challenges they’re facing and then take action to make those solutions realities.

According to Marilyn Darling, founding partner of Signet Research & Consulting, LLC, one of the best ways in which grantmakers can learn from each other is by sharing their stories. But the focus should be on a particular type of story — not the “ain’t we great” variety where grantmakers celebrate their successes, or even stories crafted to educate other people about what to do or not.

Rather, the types of stories that foster the best learning are those that help everyone in a given community or group see the way to do their work more effectively in the context of their own vision, purpose and goals. The organizing principal, according to Darling, is to bring grantmakers together around a powerful “framing question.”

Darling advises grantmakers to choose a question that everyone in the room will care about, starting with a phrase such as “What will it take for us to ...?” Then the discussion should center on stories that address the question most power-

fully, including both successes and failures. The focus should be more on the journey than on the end point — bumps you encountered and how you got past them.

The basis of the emergent-learning approach, according to Darling, is that “everyone is an expert among experts, and everyone has something to learn.” And the goal is to create a shared theory of success, a shared understanding of what it takes to get where you want to be.²¹

Not only can peer learning approaches lead to greater effectiveness for grantmakers, but also they can lead to greater accountability for the field as a whole. “Peer review has emerged as one accountability system that seems tailor-made to increase philanthropy’s overall knowledge, effectiveness, credibility and maturation — without compromising its essential diversity and independence,” according to the authors of *Peer Review in Philanthropy: A Road to Accountability and Effectiveness*.²²

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21. For more information on EL Maps™ and to access materials from Marilyn Darling’s remarks at the Learning for Results Opening Plenary, “Emergent Learning: Peer Learning for Improved Results,” and breakout session, “Learning From Each Other’s Stories:” www.geofunders.org/organizationallearning.aspx.
 22. Patricia Patrizi et. al. *Peer Review in Philanthropy: A Road to Accountability and Effectiveness*. Patrizi Associates. February 2006.

Case Study

LEARNING WITH OTHER GRANTMAKERS: COMMUNITY FOUNDATION FOR GREATER BUFFALO AND JOHN R. OISHEI FOUNDATION

Buffalo, New York

The leaders of the Community Foundation for Greater Buffalo and the Buffalo-based John R. Oishei Foundation recently came to the same conclusion: they needed to get better at gathering and sharing data and information about their work.

When both organizations' strategic plans came out in favor of making knowledge management more of a priority, they decided to share the burden of strengthening their learning capacities. A key force in bringing the foundations together was Clotilde Perez-Bode Dedecker, who serves as vice president for program with the community foundation and as a board member with Oishei.

“To paraphrase Woodrow Wilson, I use all the brains I have and all the ones I can borrow,” said Dedecker in explaining the foundations' plans. “The challenges facing our communities are increasing in complexity and scope. When faced with needs that far outpace available resources, the privilege of making a difference demands a strategic approach undergirded by a deep commitment to continual learning, informed dialogue and research.”

In early 2007, the foundations selected Laura Quebral Fulton for what they called a “joint appointment.” Her charge: to work with each of the foundations to design and implement better knowledge management programs. After studying the knowledge management work of other grantmakers such as the Barr and Columbus foundations, Fulton got to work on a knowledge audit and needs assessment for the foundations.

“My goal was to find out how information was shared in the two organizations, and what tools they already had for making knowledge management a reality,” she said.

After a series of staff interviews and retreats, plus a joint meeting of the two foundations' staffs, Fulton produced an 18-month knowledge management plan for each grantmaker. Among her early priorities: fixing the foundations' intranets, shared folders and libraries to allow for easier sharing of information; and reviewing grant reporting procedures to see “if we are asking the right questions.”

Another priority for Fulton: helping the foundations do a better job of assessing the impact of their work. “The community foundation has four focus areas and Oishei has six, and we can do real, measurable evaluation work around those with real benchmarks,” she said. One possibility

she's looking into is providing training for grantees in how to think more evaluatively about what they do on a day-to-day basis.

However, even while she has been laying the groundwork for broader changes, Fulton recognizes the importance of showing early results. "People wonder why you're doing all this work, and they don't even know what knowledge management is," she says. "So it's important to show some results right off the bat."

With this in mind, Fulton devoted a good part of her first month on the new job to conducting a survey of area organizations and citizen action groups attending a May 2007 environmental summit. The survey produced helpful information for both funders about how they were perceived in the community, as well as key management and other issues facing local activists.

In 2008, the two foundations are planning to roll out a number of activities that will move their learning efforts from the planning phase to action. Chief among these is a complete overhaul of the Oishei Web site, with an emphasis on providing grantees and the broader community with resources on key issues, along with better information about the foundation's focus areas and goals. Both Oishei and the community foundation also will be implementing an electronic submission process for grants, while jointly working on GIS mapping activities to provide a better sense of areas of impact and need in the community.

"The ultimate goal of the work is to help the two organizations make better-informed investments, both independently and in collaboration with each other and with other funders," said Fulton.

Lessons Learned

- Find a high-level champion for the learning effort.
- Share the costs of a ramped-up learning focus with other grantmakers, where appropriate.
- Engage staff in assessing the organization's learning goals and needs.
- Seek ways to strengthen existing learning tools, such as intranets, Web sites, etc.
- Investigate how to help grantees — and your organization — do a better job of assessing impact.
- Find "early successes" as a way to build buy-in and trust.
- Join with other grantmakers to explore opportunities for shared learning and collaboration.

For more information: www.cfgb.org; www.oisheifdt.org.



MOVE IT FORWARD

What Are the Next Steps for the Field?

As we noted up front, philanthropy is just learning what it means to learn, and how to do it in a way that informs action and better results. While the ideas and the examples in this GEO Action Guide will help grantmakers begin to leverage the power of learning to achieve their mission, more work remains to be done. The field of philanthropy still does not have a complete picture of what it takes to become a learning organization, how to sustain the work of learning, and how to connect learning to results.

Working collectively and with grantees, grantmakers need to generate and share more learning about learning — practical information and insights that can help individual organizations and the field as a whole. Among the priorities for the years ahead:

- A stepped-up commitment to learn from our grantmaking failures — by encouraging honest, open, transparent discussion of mistakes and how to apply those lessons to future work.
- More reflection on what it means to learn with grantees — and on how to create a grantmaker-grantee relationship that is conducive to shared reflection, openness and trust.
- Increased levels of learning with other grantmakers so that individual organizations are not always reinventing the wheel and can learn from and apply the lessons of other funders.
- More data and information on how learning leads to improved results for grantmakers and grantees alike — we know intuitively that this is true, but we need more proof.
- More documented successes showing how grantmakers are using learning to broaden and enhance their impact on issues — with a focus on examples of learning across organizations.

GEO applauds grantmakers that are taking the lead in initiating new conversations and advancing new learning around this vital topic. And we pledge to continue holding up their pioneering work and the work of others who are committed to learning for results.

Philanthropy's learning journey has just begun. The more people and organizations that join in, the more we all will learn.

PEER LEARNING MODELS FOR PHILANTHROPY

Practitioners and academics working on social change from a variety of vantage points increasingly are coming to the same conclusion: the people closest to the problem are best equipped to solve the problem. The growing use of collective leadership models and empowerment or stakeholder evaluation is evidence of how this thinking is taking hold in the nonprofit sector. The following models are methods grantmakers can use for peer learning — either among grantmakers or in partnership with grantees.

The Breakthrough Series Collaborative Model, Institute for Healthcare Improvement

This model aims to allow organizations to dramatically improve a particular area of focus in a short time frame. It uses collaborative meetings of organization members as forums for sharing best practices regarding pressing problems and communicating action plans for solving them. See www.ihl.org.

Emergent Learning with EL Maps™, Signet Research & Consulting, LLC

The emergent-learning approach aims to address timely, complex issues that lack easy solutions. It is designed to be applicable to many different conditions, and it allows for solutions to grow and change as they are tested and developed. This approach helps teams align their thoughts with actions by focusing team discipline and fostering strengthened analysis about key challenges. See www.signetconsulting.com.

Positive Deviance, Jerry Sternin, Ford Foundation's Positive Deviance Initiative

This model is based on the idea that every group includes innovators who approach their work in a better way than the group as a whole does. Individuals using this approach identify success strategies of these “positive deviants” and bring them into the mainstream of the organization. See www.positivedeviance.org.

Multiparty Collaborative Action Approach, David Straus, Interaction Institute for Social Change, and Interaction Associates, Inc.

In this approach, members of an organization work together to develop plans for change and solutions to problems. It is designed to be an inclusive process that facilitates buy-in and consensus building among relevant participants. See www.interactioninstitute.org.

Public Engagement Approach, Study Circles Resource Center (soon to be Everyday Democracy)

In this approach, communities or networks deliberate over common problems and explore collaborative approaches to solving them. Communities organize large-scale, inclusive dialogue and link it to measurable, sustained change on issues of importance. See www.studycircles.org.

DECIDING ON THE RIGHT TECHNOLOGIES

Although technology should not be the focus of a learning strategy, most organizations will at some point turn to a technology tool to enable them to make their learning strategies more widely accessible to their staff and grantees. Among the technologies that can support an organization's learning work:

Grants management systems are typically a foundation's largest, most shared, most well-organized and commonly used and searched information repository.

Contact management systems are software programs such as Outlook™ allow an organization to create a centralized file system for contacts.

Document management systems are repositories, or databases, that allow an organization to organize and manage documents.

Knowledge-base systems are self-service, integrated knowledge management applications that are easy to install and use to provide searchable access to content.

Records management systems enable the management of records in any format or media type, from their inception/receipt all the way through disposal. They are typically used to implement retention/archiving policies and meet legal, compliance and regulatory requirements.

E-mail active archiving applications offer improved e-mail archive management, access and retention to streamline compliance with regulatory requirements.

Search engines and document search appliances are preconfigured in easy-to-install hardware. They enable organizations to have greater configuration options.

Content management systems are repositories, or databases, that allow an organization to organize, archive and publish information. Content management systems include Web content management, document content management, and enterprise document management.

Portal sites offer a wide range of resources and services, such as e-mail, forums, search engines, knowledge-bases, document libraries, databases, forms, online discussions, reference links and online services.

Adapted from Martin Schneiderman. *Technologies that Enable Knowledge Management: Understanding the Options and Getting Started*. Information Age Associates. www.iaa.com/resources/GEOTechnologiesThatEnableKM.pdf

RESOURCES

For these and other resources on learning: www.geofunders.org.

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