

What does it take to learn together well?

Many grantmakers embrace the value of learning and evaluation as a path to achieving better results. However, some see evaluation as something that takes place independently and primarily for internal improvement, and they struggle to extend this learning to those outside their organizations in a meaningful way.

Additionally, grantmakers do not consistently provide grantees with the resources they need to evaluate and learn from their own work. A survey by the Nonprofit Finance Fund found that the majority (69 percent) of nonprofits reported that their funders rarely or never cover the costs of impact measurement.¹ To make a lasting impact on the issues we care most about, we need to learn together.

When we learn with others, we are not simply conducting final program evaluations; we are regularly assessing ways to improve our work and finding ways to be smarter and more effective in achieving our goals. Learning together means collaborating with partners throughout the learning cycle, as identified by Innovation Network, which includes planning, collecting and analyzing data, and acting and improving our work in response to findings.² When grantmakers join their partners in the learning journey, we acquire better information, which leads to better results.

“The ultimate focus of learning is not ‘What should the foundation be doing about this problem?’ Rather, the question should be, ‘What knowledge and expertise can we draw on to solve this problem, and how can we bring people together to make sure we are all working from a unified understanding of the problem and its solutions?’”
– Joe Dickman, deputy director for research, evaluation and learning, The MasterCard Foundation

¹ Nonprofit Finance Fund, “State of the Sector Survey.” 2015. Available at <http://nonprofitfinancefund.org/state-of-the-sector-surveys>.

² Innovation Network, “Building Capacity for Evaluation and Learning.” Presentation at Grantmakers for Effective Organizations, Washington, D.C., January 24, 2011.

It can be difficult to shift learning and evaluation from a solely internal practice to something that involves others. Interviews with grantmakers revealed that learning together can take multiple forms, but they are generally guided by three primary questions. These questions help us effectively structure opportunities for learning together.

For more information on this topic, see [Learning Together: Actionable Approaches for Grantmakers](#). (Washington, D.C.: Grantmakers for Effective Organizations, 2015).

What do we want to learn together — and why?

Each organization — and its partners — has unique learning goals. No matter the focus, all learning must have a purpose. To have a greater impact, we need to identify what we want to learn together and why.

Grantmakers that successfully engage partners in shared learning carefully establish shared goals from the beginning. It can be helpful for grantmakers to convene their partners upfront to have meaningful conversations regarding what they want to learn and why they are engaging in shared learning efforts.

GEO's research with grantmakers identified four primary objectives for shared learning activities.

- **Analyzing and building shared knowledge of an issue.** Some shared learning occurs when grantmakers want to work together with partners to establish a shared understanding of specific issues. The shared knowledge that is developed through these conversations can help them form more effective and aligned solutions. As Marie Colombo, director of evaluation and learning at The Skillman Foundation, said, “We don’t take a finished product to our partners. We bring data to them and walk alongside them as they interpret it.”
- **Developing a new plan or initiative.** For some grantmakers, shared learning provides an opportunity to work with partners to design a new initiative or create a new program about a specific issue. When we bring people together, we can use the shared knowledge and leverage the expertise of partners to develop new programs that will have lasting impacts.
- **Assessing current activities to identify course corrections.** Grantmakers use various tools for learning during current projects, including developmental evaluation, learning touchpoints and feedback

loops. For many grantmakers, deploying evaluative tools throughout the course of the work, instead of only at the end of a program, allows them and their partners to make critical midcourse corrections to programs in order to achieve greater results.

- **Understanding outcomes from completed projects.** Opportunities for learning with others do not end when the project is complete. Engaging stakeholders in continued evaluation activities can help grantmakers and their partners assess outcomes. They can determine whether they met their desired goals as well as learning lessons to apply to future and ongoing work.

What are the core values and principles we should keep in mind to ensure the success of shared learning?

Successful learning requires grantmakers to shift their thinking from learning for compliance to learning for improvement. When grantmakers learn for improvement, we can use evaluation to gauge what is and is not working and draw on that information to assist grantees in achieving better results.

“We’re not in competition with the others trying to solve the same problems. Our knowledge management system and strategy has to follow suit.” – Elodie Baquerot, chief operating officer, Living Cities

GEO identified four key values and principles that contribute to the success of shared learning activities.

- **Shared control.** When we learn together, we decide together about the practices, questions and principles that guide our work. For example, we work collectively to establish the guiding questions and evaluation processes rather than delivering them to our grantees in a top-down approach.
- **Openness and flexibility.** All good partnerships require some give-and-take between partners. Each person involved in the work will have his or her own insights and questions about how to best approach the work and may have different takeaways. As grantmakers, we must set the tone of being open to multiple perspectives and make a commitment to flexibility. This ensures that shared learning efforts are useful to everyone involved.
- **Partnership.** Shared learning works best when there is an authentic partnership. This means actively engaging all members and making sure that no single participant has the sole power to drive the agenda or identify

takeaways. This partnership goes beyond gaining input from others and makes space for shared reflection and decision-making.

- **Inclusivity.** We do not need to limit our shared learning partnerships to our grantees or funding partners. When we open these partnerships up to engage other individuals, organizations, stakeholders or community members, we tap into greater expertise and insights on how to approach the work.

What are the key steps to making shared learning work?

Successful shared learning occurs when grantmakers commit to the work. This includes investing in staff and resources as well as making it a priority to establish and build trust in partner relationships. GEO's work revealed four steps that support grantmakers in their shared learning efforts.

- **Prioritize it.** Learning together takes dedicated time and resources. This commitment needs to go beyond evaluation and program staff. Shared learning is most successful when it is made a priority across the entire organization. By making this commitment a part of the culture it becomes easier to engage in these practices from the start of each new project and initiative.
- **Allocate the necessary resources.** Implementing collective learning requires resources. Those involved in the partnerships need to invest time and funding.
- **Build trust and relationships.** Relationships are the foundation of any partnership. Shared learning efforts require a high level of trust and may entail developing relationships with new partners. Relationship building needs to begin early, as building the levels of trust and honesty required for greatest impact can take time. Learning together works best when there is a culture of open and candid dialogue among partners.
- **Build capacity and skills.** Many funders who require grantees to provide outcome data and analysis do not provide sufficient financial resources to nonprofits to carry out these evaluations. Without funding, these organizations struggle to deliver on expectations, as they may not have the tools, resources, systems or human capital to complete this work. Additionally, foundation staff and other partners need to develop skills beyond knowledge management and evaluation to be effective learning partners. As Joshua Joseph, program officer for planning and evaluation at The Pew Charitable Trusts, noted, "To learn well with others, you need to have strong skills in areas like facilitation, communication and translating research for many kinds of audiences."

Engaging communities in learning

In the 2013 publication *Building Community Capacity for Participation in Evaluation*, GEO encourages funders to adopt the following strategies for bringing community members into evaluation and learning activities:

- **Create value for community residents.** Find out what community members need to know, be clear on how you will use data and remain flexible.
- **Illuminate, don't intimidate.** Use evaluators with facilitation skills and cultural competency and prepare residents to participate in evaluation activities.
- **Tailor technical assistance and training.** Assess the readiness of community members, build their knowledge of evaluation and be realistic about the “dosage” of learning activities.
- **Support community capacity for learning.** Design tools with community learning and planning in mind, establish a community liaison, and loop back to communicate findings.
- **Model transparency, accountability and consistency.** Take the time to develop trust and openness, acknowledge power dynamics, be clear about your purpose, and communicate early and often.

Five stories about learning together

The full publication of *Learning Together: Actionable Approaches for Grantmakers* features stories from the following five grantmakers that have made commitments to learning together with their partners:

- [The Skillman Foundation](#) in Detroit uses “data walks” to help foster better understanding of problems and solutions among staff, trustees, grantees and the community. During grantee and community convenings, participants review the latest data on key issues and discuss what the data say about what is working to solve problems and where they can do better.
- [Deaconess Foundation](#) in Cleveland approached a longtime grantee to propose a new learning partnership. The goal was to explore the ins and outs of supporting local residents encountering barriers to employment. The partnership kicked off with a new kind of site visit during which the grantmaker and grantee dedicated time to sharing knowledge and insights about the local workforce system and how to strengthen it.

- As part of a statewide partnership to strengthen educational outcomes for youth from foster care, the [Stuart Foundation](#) is investing in a range of activities to support a learning community aimed at cultivating sharing among partners. The learning activities include convenings, web tools and other activities and are focused on supporting the four counties involved. Participants learn from each other and share what they are learning with the wider field.
- The Challenge Scholars initiative is a partnership between [Grand Rapids Community Foundation](#) and the local public school district. The two partners worked together with a consultant to design a wide-ranging developmental evaluation that delivers real-time information and insights about how the organizations can achieve ever-improving results.
- The [Conrad N. Hilton Foundation](#) embeds collective learning in the design of six strategic initiatives, each involving as many as 50 grantees working toward shared goals. To reduce the burden on grantees, a university or consultant team takes responsibility for managing evaluation and learning for each initiative, producing regular reports for the group and supporting grantees in their learning work. The grantmaker also organizes annual convenings for each group of grantees and other partners so they can learn from each other.

For more information, see each foundation's individual case study, or the case studies section of the full [Learning Together report](#).