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Introduction

For over a decade, foundation evaluation and learning has been enjoying a renaissance of sorts. Among larger foundations, evaluation and learning are more regularly applied, and internal evaluation and learning staff are becoming more common to foundations (Coffman & Buteau, 2016; Coffman, Beer, Patrizi, & Heid Thompson, 2013). In addition, strategic learning, an approach that aims at "helping organizations or groups learn in real time and adapt their strategies to the changing circumstances around them" (Coffman, Reed, Morariu, Ostenso, & Stamp, 2010, p. 4), continues to garner attention in the field. More and more, philanthropy appears persuaded that investments in foundation evaluation and learning are fundamental to good strategy and delivering impact (Hamilton, et al., 2005; Patrizi, Heid Thomson, Coffman, & Beer, 2013).

In 2015, the Episcopal Health Foundation launched a project to distill lessons about how foundations configure evaluation and learning and allocate related responsibilities in support of strategic learning. As a newly established public charity, the foundation initiated planning for these functions by reaching out to peers as well as recognized pacesetters in foundation evaluation and learning. Strategic learning was of particular interest to the foundation because it presented a framework for translating evaluation and other sources of information into strategic decision-making (Coffman & Beer, 2011). Simply put, since we had the privilege of setting up shop early in the foundation's organizational development, we wanted to know what could we put in place that would help accelerate organizational results.

Key Points

- Strategic learning, a critical if relatively new lens for philanthropy, is neither simple nor efficient to institutionalize or practice yet — foundations are still figuring out how to do it well. In 2015, the Episcopal Health Foundation launched a project to distill lessons about how leading foundations configure evaluation and learning, and how they allocate related responsibilities in support of strategic learning.

- This article addresses different models that foundations use to establish and staff evaluation and learning functions, what other organizational considerations they should take into account in order to prioritize strategic-learning work, and what tools and approaches can be used to initiate strategic learning.

- Interviews with officers from more than a dozen foundations revealed that strategic learning does not require wholesale structural and cultural change; an incremental approach, instead, can phase in greater complexity as foundations expand staff capacity. The interviews also uncovered several areas where further exploration of system building and practice at foundations has potential for advancing the field.

Overall, the organization of foundation evaluation and learning typically reflected a unique intersection of organizational history and changing views within philanthropy regarding evaluation and learning.

Philanthropic gray literature[1] indicates that a number of major foundations are experimenting with organizational structures, cultural mechanisms, and the adoption of new practices to bridge evaluation and strategy through learning.[2] Yet little has been written about "what it takes to truly implement strategic learning" (J. Coffman, personal communication, June 18, 2015). Our project sought to address how to optimally establish and staff evaluation and learning functions, what other organizational considerations to take into account in order to prioritize strategic learning work, and what concrete tools and approaches could be used to initiate strategic learning processes, sooner rather than later.

We initiated the project with a philanthropy-related literature search of peer-reviewed and gray-information sources in order to identify foundations gaining recognition in the field for evaluation and learning. Then, we developed a purposive sampling strategy designed to yield maximum variety among selected interview participants (i.e., Patton, 1990), including foundation size, based on staff and assets; the location of evaluation and learning functions within the foundation; the foundation's regional location;

[1]Gray literature can be defined as source material that is not peer-reviewed (Breitenbach, 2009). It can take various forms, including the online publications of a professional association.

[2]FSG seeded this analytic framework, with an emphasis on the alignment of strategy, learning, and evaluation functions, structurally, culturally, and in practice (Preskill & Mack, 2013).

and evaluation- and learning-related job titles. Thirteen semistructured phone interviews, lasting 45 minutes to an hour, were conducted, and interview notes were validated by participants, a number of whom also provided feedback on drafts of this article. (See Appendix.)

Structural Configurations of Evaluation and Learning Functions

Foundations locate evaluation and learning functions within different organizational areas, including programmatic areas, operations, and separate, dedicated units. Through interviews with sampled participants, we explored how foundations approached staffing for evaluation and learning, how they determined the placement of these staff, and how they used organizational structure (i.e., what is reflected in an organizational chart) to support the uptake of evaluation and learning work by the foundation as a whole.

Several models for structuring foundation evaluation and learning functions emerged from our interviews:

1. those that located evaluation under the auspices of an organizational-learning function;

2. those that aimed to integrate learning into the titles, responsibilities, and roles of evaluation staff;

3. those that centralized a range of evaluation- and learning-related functions and staff within newly created departments;

4. those that established separate organizational units to support the distinct functions of learning and evaluation; and

5. those that aimed to diffuse evaluation and learning functions across staff and programs.

Each of these models tended to vary in terms of three continuums: a value placed on the ascendancy or equivalency of evaluation and learning functions, the relative centralization or diffusion of related responsibilities, and level of integration

FIGURE 1 Structural Characteristics of Foundation Evaluation and Learning Functions
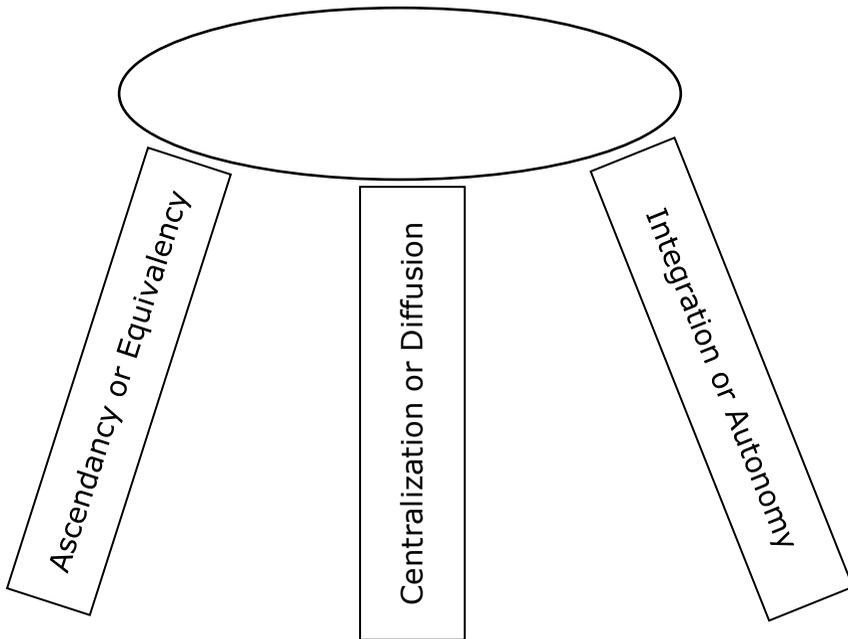
or autonomy in the operations of these functions. (See Figure 1.)

Overall, the organization of foundation evaluation and learning typically reflected a unique intersection of organizational history and changing views within philanthropy regarding evaluation and learning.

Locating Evaluation Under the Auspices of Organizational Learning

The California Endowment offers perhaps the clearest example of a foundation fitting this model. At the time of our interview, the position of chief learning officer had recently been established to oversee evaluation activities and to ensure that evaluation conducted by or for the foundation was aligned with strategy and learning. The position oversaw the establishment of evaluation mechanisms to yield timely and actionable information, as well as learning processes that supported the foundation in grounding strategy and evaluation in community experience.

In many ways, the Kresge Foundation also fits this model. In 2015, it conducted a search for a director of its new department of strategic learning, research, and evaluation. David Fukuzawa, the managing director of Kresge's health program, told us that a central responsibility of the position was to establish a learning culture within the foundation. He said that although the foundation had a long history of evaluating its work, it had struggled to synthesize learnings to inform ongoing work. Therefore, he explained, organizational changes at Kresge were not aimed at building deeper levels of staff evaluation capacity: "Learning to learn is more important for us." (See Figure 2.)

Superimposing learning on top of evaluation functions, this model represented an exciting and bold step for both Kresge and The California Endowment. It introduced new structural configurations — a chief learning officer position at the endowment and a department at Kresge with the superseding purpose of strategic learning. Further, the learning orientation of the model

FIGURE 2 Learning-Driven Foundation Model
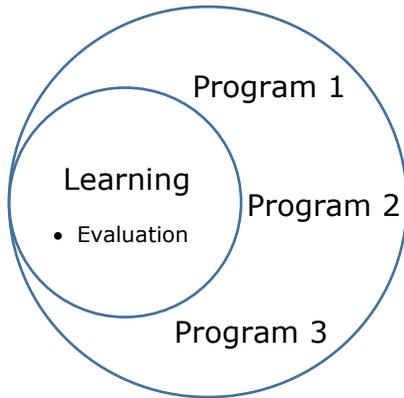
FIGURE 3 Evaluation-Driven Foundation Model
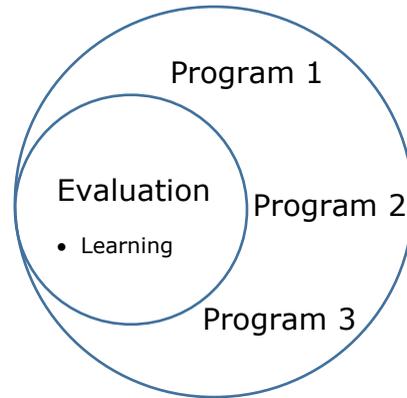
promised to help synthesize a common set of learnings across disparate programmatic interests and activities, to be used by the collective to advance the work of the foundation as a whole. It also held the potential for reducing power differentials between foundations and grantees by positioning both as learners. Yet despite these many strengths, external audiences may question the model's susceptibility to groupthink or the relevance of the knowledge enterprise beyond that of the particular foundation and its grantees.

Incorporating Learning Into Evaluation Staff Responsibilities

A number of foundations had well-established research and evaluation departments that had evolved to integrate learning functions either formally (i.e., in departmental name) or, more informally, through the adoption of new practices.[3] In 2008, for example, The Colorado Trust reconceived its research and evaluation unit, renaming it "research, evaluation, and strategic learning." According to its director, this change helped rationalize new points of engagement with evaluation, most notably in the team's inclusion early in The Trust's strategy processes.

[3]The Center for Evaluation Innovation has made similar observations, noting changes in the names of evaluation units and in the responsibilities of evaluation staff (Coffman, et al., 2013; Heid Thompson & Patrizi, 2011).

At the Wallace Foundation, the research and evaluation unit evolved more organically. The unit's director said grantees helped illuminate the knowledge needs of policymakers and other decision-makers in the field, and the role the foundation could play by aligning its research, funding, evaluation, and communications to support field advancements in these areas. The unit has increased its involvement in developing Wallace's strategic responses, disseminating findings, and engaging the field of practice. (See Figure 3.)

One of the real strengths of this model is its potential for elevating the role of the evaluation function within the organization and its regular engagement of nonevaluation staff with evaluative thinking. This model positions evaluation staff within the strategy-design process, creating and utilizing feedback loops that strengthen each function. However, it also requires evaluators to expand their roles and range of responsibilities significantly — and in areas where they likely have not had formal training.

Centralizing Evaluation and Learning Staff in New Departments

This model represented a common way that foundations within our sample had configured evaluation and learning functions. The research, evaluation, and learning unit at the Annie E. Casey Foundation, for example, brought

FIGURE 4 Equivalency Model


FIGURE 5 Autonomy Model
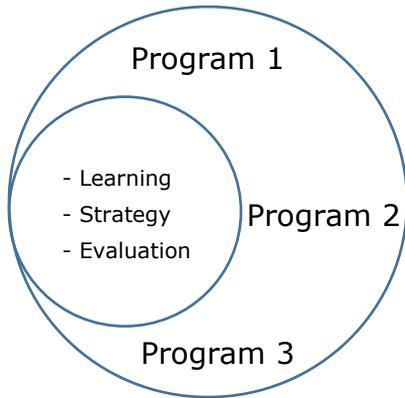
geographically dispersed evaluation staff into a single unit and integrated other staff to focus on performance and knowledge management. Another variation of this model was seen at the William and Flora Hewlett Foundation, where an effective philanthropy group was formed by centralizing staff and functions related to organizational effectiveness and by hiring an evaluator to supplement the team. (See Figure 4.)

This model underscores the importance of evaluation and learning to any effective organization. It raises the visibility of these functions by highlighting their role in foundation effectiveness and linking them to strategy — something that at many foundations is engaged in only by boards or executive-level staff. One caution about this model, however, is that other staff in the organization may perceive less responsibility for evaluation and learning once a department has been dedicated to those functions. It also may be appropriate to monitor whether such a unit has sufficient staffing; when so many areas of expertise are combined, it may be more difficult to ensure that any one of the functions is effectively implemented within the organization.

Establishing Separate Units for Learning and for Evaluation

The Lumina Foundation offered an alternative model for addressing evaluation and learning functions: it has one unit dedicated to
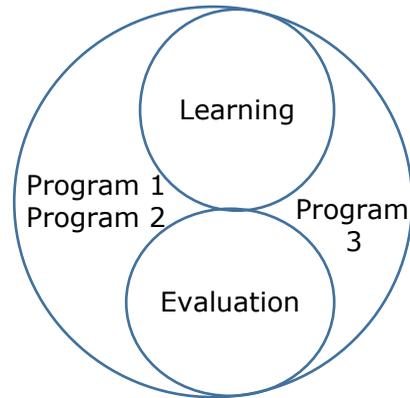
organizational performance and evaluation and another to address organizational learning and alignment. The performance and evaluation unit manages a multitiered evaluation system linking organizational performance goals to field impact; the other facilitates organizational learning and alignment within the foundation. (See Figure 5.)

Like the previous model, this configuration elevates the functions of evaluation and learning by introducing a new unit. But in contrast to the prior model, each function is staffed by a team that supports autonomous work. The strength this model gains from the organizational structure, and its team resourcing, may nonetheless create some organizational barriers. One could imagine challenges that might emerge to the alignment of these functions spread across two different teams, as well as the potential for missed opportunities for leveraging functions in the advancement of strategic learning.

Diffusing Evaluation and Learning Across Staff and Programs

While it generally is the aim to embed evaluation and learning activities throughout an organizational structure, most sampled foundations had dedicated staff to manage those functions. The McKnight Foundation stood alone in investing in evaluation- and learning-related functions over a significant period of time without designating specialized staffing to either function.

Despite the common practice of organizational restructuring, we had growing questions about the relative importance of how evaluation and learning were structurally configured compared to, for instance, the role of organizational culture in supporting these functions.

FIGURE 6 Do-It-Yourself Model

(See Figure 6.) As its vice president of operations explained, McKnight was reticent to do so for fear that staff would no longer see quality improvement, knowledge management — and, indeed, learning — as the responsibility of all.[4]

As the McKnight example highlights (Christiansen, Hanrahan, & Wickens, 2014), there is a significant organizational benefit when all staff are engaged in the evaluation and learning work of the foundation. Conversely, foundations utilizing this model do not benefit from professional expertise except, perhaps, on a consultant basis. Reliant on external expertise, and on internal champions that informally grow skills, organizations may be susceptible to the loss or diminishment of these functions.

Early in the interview process, we had some sense that foundations approached the staffing and structural configuration of evaluation and learning functions somewhat differently. Throughout, we continued to be surprised by these differences — but also by the fact that no one model emerged as a clear example of how foundations could best structure these functions. Our interviews suggested that while structural support was useful, it also could create barriers to productive operations. Despite the common practice

of organizational restructuring, we had growing questions about the relative importance of how evaluation and learning were structurally configured compared to, for instance, the role of organizational culture in supporting these functions.

Culture Matters

Philanthropic interest in strategic learning — the ability to learn and improve strategy through evaluation and other sources of insight — may in many ways represent a natural evolution of the field, marked by a number of cultural shifts that have normalized aspects of both evaluation and learning. One shift is the adoption of continuous quality-improvement tenets and practices. We see evidence of this, for example, in the Annie E. Casey Foundation's promotion of results-based accountability, a specific methodology for performance management. We also see evidence of this in the publications of philanthropic affinity groups, which conceptually link foundation learning to improvement practices (Grantmakers

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[4]McKnight did, however, utilize external evaluation contracts, which were managed by the vice president of programs.

for Effective Organizations, 2009). Data-based decision-making, a related shift, emphasizes the use of data in quality improvements as well as other types of organizational decision-making, including strategy. Another key shift within the field has been alternatively called "outcomes-oriented philanthropy" (Brest, 2012) or "strategic philanthropy" (Kania, Kramer, & Russell, 2014). Strategic philanthropy rallies foundations to invest in results — specific, desired outcomes that can be operationalized and monitored to inform a foundation's investment-related activities.

Our project found that these new orientations did help bring about in the foundation workplace many cultural changes — and not simply the window dressing as which structural change might be perceived. Yet we also found that cultural change remained an important area of unfinished business. Organizational-learning literature, in particular, was helpful in revealing the incomplete culture project within foundations. Two components of foundation learning were specifically helpful in illuminating the cultural changes needed to more fully support and institutionalize strategic learning: a clear and concrete value proposition, and leadership for learning (Hamilton, et al., 2005).

The Value Proposition

Becoming a learning organization requires foundations to codify through a value proposition what they mean by learning, the goals for foundation learning, and the implication of a learning approach for how a foundation operates (Hamilton, et al., 2005). For philanthropic leaders committed to building learning organizations, the value proposition is indeed one of community change and social impact. In terms of how to get from here to there, interview participants identified two aspects of the learning approach that have provided the most leverage for organizations: the role of inquiry and the acceptance of mistakes as a part of the learning process.

Foundation participants commonly observed that building a culture of inquiry was central to building an environment conducive to both evaluation and organizational learning. As described by participants, a culture of inquiry promotes a

> *Importantly, a culture of inquiry also recognizes the power of a good question, often defined as a learning or evaluative question, designed to develop breakthroughs in approaches to persistent problems.*

collective orientation within a foundation toward curiosity and discovery. They also described such a culture as engaging staff centrally in the mission work of the foundation and collective enterprise of achieving impact.[5] Importantly, a culture of inquiry also recognizes the power of a good question, often defined as a learning or evaluative question, designed to develop breakthroughs in approaches to persistent problems. The McKnight Foundation, for example, invested in staff capacity to ask good questions, engaging consultants to do so and deploying staff work groups to solve organizational concerns regarding knowledge management. When organizations focus their learning around questions, it can shift the mentality from "Did we make the mark?" to "How can we deepen our understanding in order to adapt, so that we can make the difference that is truly needed?"

Interview participants, however, indicated that foundations needed to do more to normalize "failure" in order to advance inquiry, evaluation, and the application of insights.

The Hewlett Foundation has been identified as one of the leading foundation voices addressing the need to learn from failure.[6] Creating safe spaces for staff to talk about what hasn't worked remains an ongoing focus of the foundation.

[5]In turn, staff engagement has been linked to increased workplace efficacy and satisfaction (Gallup Inc., 2013).

[6]Hewlett's dissemination of evaluations of less-than-successful initiatives and willingness to serve as a learning case for other foundations have been widely acknowledged (e.g., the 2016 meeting of the Evaluation Roundtable).

Edward Pauly, director of research and evaluation at the Wallace Foundation, observed that its leadership had adopted a mantra, "facts are friendly," to emphasize that data create opportunities for improvement while de-emphasizing the fear and sense of disempowerment that people can feel when faced with disconfirming information.

June Wang, Hewlett's organizational learning officer, observed that without the space to talk about mistakes, "staff do not feel empowered to openly and rigorously analyze what went wrong and make a change in the right direction." Moreover, staff are not empowered to view a mistake as valuable organizational knowledge that should be shared with others within the foundation, let alone the foundation's external partners.

Leadership for Learning

Interview participants also underscored the importance of what Hamilton, et al., (2005) defined as leadership for learning: leadership at executive, board, and staff levels that values questions, encourages smart risk-taking and collective reflection, and demonstrates tolerance for uncertainty and failure as part of the learning process. Through the example leadership sets, leaders can help remove or minimize many barriers to learning, such as vulnerability. As Hamilton and colleagues observed over a decade ago: "Leaders shape a foundation's culture and enable or compromise its capacity to learn" (p. 26).

A number of foundations in our sample highlighted the role of leadership. Nancy Csuti, director of research, evaluation, and strategic learning at The Colorado Trust, shared leadership's

efforts to shift the foundation's mindset by charging staff to "make new mistakes." Edward Pauly, director of research and evaluation at the Wallace Foundation, observed that its leadership had adopted a mantra, "facts are friendly," to emphasize that data create opportunities for improvement while de-emphasizing the fear and sense of disempowerment that people can feel when faced with disconfirming information.

Even with the many accomplishments and signals of positive culture change in foundations, interview participants indicated that culture change was hard work, and it was incremental. Yet participants also understood that culture work was a necessary part of the effort to improve foundation effectiveness. As Peter Drucker has popularly remarked, "culture eats strategy for breakfast" (as cited in David and Enright, 2015, p. 4): that is, despite good intentions, awareness, and knowledge, work that is not actually supported by the organizational culture is unlikely to manifest.

Building Learning Muscle

One approach to strengthening a culture of learning is to build a learning practice. Interviews suggested that a number of leading foundations are implementing learning practices — that is, engaging staff in a learning process that is embedded in day-to-day work. An organizational learning practice trains staff how to think together and, when done effectively, can establish learning feedback loops that engage staff with real-time information. Thus, a learning practice builds staff's capacity to learn and the practice becomes a mainstreamed, habitual part of thinking, rather than a special exercise (J. Coffman, personal communication, June 18, 2015).

Among the learning practices we identified from participating foundations:

- The David and Lucile Packard Foundation and The California Endowment use learning agendas to support within-program and cross-organization learning and alignment. A learning agenda contains the burning questions a group seeks to address, opportunities for discovery, and responsible parties.

- The Packard and Annie E. Casey foundations have designed learning practices that engage teams in evidence-based decision-making utilizing data dashboards.

- The Colorado Health and Vitalyst Health foundations have employed emergent learning[7] to build a systematic practice that utilizes data, generates insights, and articulates hypotheses and work opportunities to test them.

- The St. David's Foundation has deployed a "data review," bringing together an evaluation staff member, the assigned program officer, and the individual grantee to explore how program data — distinguished from data reported to the foundation or other funders — can be used by the grantee to inform its own organizational learning.

As this list suggests, the practices foundations are employing vary in approach and resource requirements. They each, however, normalize learning as a part of the workflow and bring greater discipline to its practice.

Emerging Lessons About Foundation Learning Practices

Collectively, several lessons emerged from interviews about how to support the development of a learning practice. First, participants suggested that a degree of experimentation is needed to learn what works for a particular organizational context, given its history and culture. In other words, the development of a learning practice involves a measure of trial-and-error, such as being willing to test a learning practice in different group settings to learn more about how and when it catches hold. For example, Hewlett's June Wang said she found it a helpful principle to "pressure test" new learning activities with small groups prior to rollout for wider staff engagement.

Interviews also suggested that learning practices must engage staff in capacity building in the

[7]See http://www.signetconsulting.com/concepts/emergent_learning.php

> *[T]he practices foundations are employing vary in approach and resource requirements. They each, however, normalize learning as a part of the workflow and bring greater discipline to its practice.*

art and science of posing a good question if the organization is to go beyond the "did we hit the mark" mentality. As Julia Coffman observed, "an effective learning practice hinges on staff capacity to facilitate and participate in learning conversations" (personal communication, June 18, 2015). Some foundations, such as McKnight, Colorado Health, The California Endowment, and Kresge, utilized external consultants to build staff capacity and support the ability to identify questions that would make a difference in foundation decisions.

Finally, foundations also were learning about where to best situate a learning practice to inform strategic decisions made by the organization. For example, foundations stressed the importance of aligning the learning practice to decision-making timelines, such as strategic planning and strategy "refresh" cycles. Foundations also were seeking learning practices with the flexibility to be applied to different levels of learning about specific initiatives, program areas, and overarching foundation strategies.

Areas of Traction in Advancing a Learning Practice

Through interviews, we were able to identify a number of tools and methodologies that seemed of particular value to strategic learning and the alignment of evaluation, learning, and strategy.

Learning Agendas

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learned to generate better results. While it contains an organization's improvement priorities, it poses these as questions for relevant teams. The learning agenda also specifies the upcoming opportunities that will allow groups to deliberately investigate and learn about improvement needs. Moreover, the agenda itself provides a structure for harvesting learning from groups in service of the larger organizational priority.

Cross-Functional Teams

Also known as multidisciplinary teams, cross-functional teams are rapidly becoming a professional standard in many organizations, such as education and health care, marked by complex service structures. Interviews indicated that several foundations have implemented cross-functional teams to promote cross-fertilization and learning across departments and to ensure that all major functional roles are engaged in the design and implementation of programs and initiatives. Interview participants indicated that these organizational changes were not easily implemented, but were very worthwhile.

McKnight's vice president of operations described utilizing a cross-functional team to engage staff in organizational problem-solving and observed that it helped create new lines of communication and information-sharing among staff. At the Robert Wood Johnson Foundation, cross-functional teams were being deployed

more broadly: cross-team, ad hoc learning groups to explore timely and cross-cutting programmatic issues and cross-functional teams to staff portfolios and initiatives. The Wallace Foundation also utilized cross-functional teams to staff all programmatic areas of work; each team is composed of program officers, research and evaluation officers, and communications staff. Wallace, in particular, heralded the cross-functional-team model in supporting program officers in understanding evaluation results and how to use them, as well as ensuring that relevant areas of expertise within the foundation were brought to bear during all stages of strategy development, implementation, and adaptation.

Emergent Learning

The practice of emergent learning facilitates disciplined attention to insights that emerge from work, followed by application of these insights to improve results (Darling, 2012). Its hallmark is the practice of making thinking, intentions, and results visible through the use of group-learning tools such as before- and after-action reviews, emergent-learning tables, framing questions, and learning logs. Several foundations identified benefits of emergent learning: it entails use of a suite of simple, well-tested tools supportive of an improvement process; it embeds learning "in the flow" of the work, thereby keeping work at the center; and, through its simplicity, lends itself to a wide range of workplace applications as well as habituation.

The Colorado Health Foundation is a leading foundation in the deployment of emergent learning. It has been successful in implementing emergent-learning tools, and has found that those tools have supported both program and evaluation staff in clarifying the intent of the foundation's work and in refining the theories of change underlying various portfolios. Specifically, tools helped staff bring together multiple sources of evidence, walk through a sense-making process of the data, and then plan next steps that reflected their new insights. Kelci Price, the foundation's director of research and evaluation, explained:

> This was critical. We didn't just want nice conversations — we were looking for a clear link for how to take action differently.

Other foundations interviewed also found emergent learning relevant. For example, The Colorado Trust's introduction to emergent learning contributed to the reconceptualization of the evaluation unit's role within the foundation, Csuti said:

> Emergent learning helped promote learning about what was happening at the current time and to align evaluation and strategy.

Vitalyst found emergent learning helpful in establishing authentic learning partnerships with grantees by supporting the discovery of collective interests, increasing the visibility and weight of grantee interests, and framing shared as well as separate, related lines of inquiry as mutually beneficial.

Building a Strategic Learning and Evaluation System

A strategic learning and evaluation system (SLES), a design and implementation approach developed by FSG, involves a toolkit that helps organizations think through five components: a vision, a strategic focus, monitoring and evaluation activities, a supportive learning environment, and a cross-cutting learning culture and embedded practices. "When fully implemented, these elements work together to ensure that learning and evaluation activities reflect and feed into the organization's latest thinking. … [and] can help answer the most pressing questions of leadership and staff" (Preskill & Mack, 2013, p. 6).

A growing number of foundations are participating in FSG's portfolio of SLES work, including The California Endowment and Kresge. Both foundations were in various stages of implementing strategic learning and evaluation systems at the time of the interviews, but indicated that the process was helpful in internally aligning the organization on the questions that mattered. Kresge reported that it also found the process helpful in ensuring a systematic

Foundations reported growing awareness and understanding of the capacity-building needs of grantees in performing highly complex social-change work. This, in turn, deepened their understanding of the internal capacities and new ways of working necessary for foundations to improve partnership with grantees.

approach to budgeting resources for evaluation and learning functions.

Engaging Grantees to Inform Strategy

One emerging trend, if not a specific practice, among the foundations interviewed was the incorporation of grantee perspectives into strategy development. The Center for Effective Philanthropy's Grantee Perception Report represented a common point of entry into further inquiry about and experimentation with how to collect strategy-informing data and feedback from grantees. Interviews further indicated that grantee engagements focusing on capacity building might serve as a next step for foundations to learn more about how strategies may need to be adapted to work more effectively with grantees.

For foundations such as The California Endowment and Vitalyst, for example, capacity building was a joint and mutually beneficial endeavor initiated in partnership with grantees to support systems-level change. Foundations reported growing awareness and understanding of the capacity-building needs of grantees in performing highly complex social-change work. This, in turn, deepened their understanding of the internal capacities and new ways of working necessary for foundations to improve partnership with grantees.

Strategic learning requires that staff understand how to plan, hold, and act upon conversations that move collective thinking forward constructively. This requires both a workplace culture supportive of learning and protected spaces to practice new skill sets.

Discussion

Strategic learning offers foundations working toward greater accountability and social impact a new approach to promoting organizational change: It links foundation actions to strategies and rationalizes change based on insight and evaluation. Strategic learning also provides a framework for making evaluation less of a one-off and informative to foundation decision-making. Ultimately, strategic learning provides us with feedback about the relative effectiveness of the strategies we deploy, how they can be refined, and whether they deserve further pursuit.

Our interviews suggested that a number of foundations are grappling with how to set up organizational structures to support, integrate, and elevate strategic learning as a new function. Further, we found a range of ways that evaluation, learning, and, to a lesser extent, strategy functions are configured, bundled, and bolstered within the foundation context. Philanthropy has not yet developed consensus on how best to structure these functions to support their alignment and optimal functioning.[8]

[8]A notable exception was that a number of foundations underscored the importance of evaluation being positioned independently of programs and having a direct line of communication to foundation executive leadership.

Our findings, however, also suggest that a consensus on structure may not be necessary or even desirable. We found that foundation staff were challenged at times by structural limitations, regardless of the particular configuration. Foundation leaders were seeking an adaptive culture that allowed organizational staff to move beyond structure, whatever form it assumed, to develop strategy that fully leveraged the collective knowledge of the foundation.

Structural approaches may have a tendency to underestimate the need for staff to adapt to changes, to develop new workflows, and to make sense of changes in roles. Strategic learning requires that staff understand how to plan, hold, and act upon conversations that move collective thinking forward constructively. This requires both a workplace culture supportive of learning and protected spaces to practice new skill sets. As Nancy Csuti of The Colorado Trust cautioned, strategic learning requires a significant culture shift for foundations.

The introduction of a learning practice can incrementally shape organizational culture while allowing strategic learning to gain a foothold. A learning practice creates space to experiment with substantive work as well as new team processes for generating insight. As the Colorado Health Foundation's Kelci Price has shared, a learning practice can be scaled as foundations grow in their readiness for adoption, and it can be targeted where there is the greatest urgency or momentum within an organization. In short, learning practices instill the knowledge of how to learn within a foundation and thereby influence the larger culture of problem solving, planning, and strategy development.

Conclusion

Strategic learning is a critical if relatively new lens for philanthropy. It reveals artificial organizational boundaries, such as that between evaluation and strategy, that inhibit the effectiveness of foundations. Moreover, strategic learning has reawakened philanthropy's interest in foundation learning and harnessed it with greater intentionality than it has historically enjoyed. In the

context of strategic learning, the learning enterprise assumes greater urgency and focus.

There has been concern that foundations are faltering in response to the challenges they face in becoming more strategically driven organizations, downplaying the complexity of their work and ignoring the uncertainties inherent in the strategic enterprises they pursue (Patrizi, et al., 2013). Yet strategic learning is neither simple nor efficient to institutionalize or practice. Foundations are still figuring out how to do it well.

This should not be too surprising, as learning is among the most difficult kind of work organizations do. It depends on willingness to change, to admit mistakes, and to take action and responsibility as a group. Collective learning is never a technical task with one right answer; it must be negotiated, refined, and tested. It requires tremendous energy and disciplined experimentation to increase foundation capacity to engage at the strategy level and to deliver on more effective, better designed and executed initiatives and programs. As a field, perhaps philanthropy is simply regaining its footing — what naturally follows any significant shift in how we think about our work.

Our quest for strategic learning through the looking glass of leading foundations advanced our foundation's thinking significantly. For example, we were heartened to learn that strategic learning does not require wholesale structural and cultural change. We are pursuing a strategic learning and evaluation system through an incremental approach, phasing in greater complexity as staff capacity expands. We also are building a learning practice. Although this is no small feat, we now recognize that learning can be much more opportunistic and more naturally embraced where it is genuinely helpful. We also look forward to learning more from foundation colleagues about system building and practice — particularly in the next three areas, which we believe have potential for advancing the field.

First, how can a learning practice support the development of deeper partnerships and salient

[L]earning is among the most difficult kind of work organizations do. It depends on willingness to change, to admit mistakes, and to take action and responsibility as a group. Collective learning is never a technical task with one right answer; it must be negotiated, refined, and tested.

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strategies with grantees, other funders, and the community? If our work is truly about impacting systems, we need to engage a broad field of actors and more fully understand how to create conditions with partners in which to learn and improve results. We are well aware that philanthropy as a whole has been slow to advance its learning partnerships in the field and with communities (Hamilton, et al., 2005; McCray, 2014; Patrizi, et al., 2013). Yet our interviews suggest that new case examples and research about the development of learning practices with community partners is just on the horizon.

Second, as learning and evaluation professionals working in a foundation context, we are interested in how a focus on strategic learning can support strategic decision-making about the scope and content of our work in light of staffing and other resource requirements. Staff and dollars are often spread across too large a scope of work (Coffman, et al., 2013). How might a focus on strategic learning and its deployment through an organizational-learning practice support more targeted efforts and greater leveraging of investments?

Finally, we acknowledge significant progress in philanthropy's quest for strategic learning. But what is gained, beyond philanthropy? The utility of strategic learning will ultimately be measured

in terms of philanthropy's results — foundation-level contributions to community outcomes. The most pressing question to us, then, is to what extent foundations, alone and together, can produce better results, at a quicker pace, because of deliberate engagement in strategic learning — perhaps with the support of a learning practice.

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