The Foundation Review

Volume 11
Issue 1 *Foundation Learning - Open Access*

Article 7

3-2019

Reflective Practice for Learning From Experience: Navigating the Back Roads at Work

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doi: 10.9707/1944-5660.1452

Tools

Reflective Practice for Learning From Experience: Navigating the Back Roads at Work

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Keywords: *Reflective practice, experiential learning, professional development, organizational learning*

"In modern organizations, new experiences tend to come easily, but reflection does not."

– Quinn and Thakor (2018)

"Maybe reflective practices offer us a way of trying to make sense of the uncertainty in our workplaces and the courage to work competently and ethically at the edge of order and chaos."

– Ghaye and Lillyman (2000, p. 7)

Introduction

Philanthropy practitioners are invested in getting things done and making things happen. Learning from experience on the job is less of a focus for investment. My colleagues and I at The Giving Practice, the national consulting team of Philanthropy Northwest, have engaged in reflective practice to observe ourselves and others in challenging situations, explore what might be going on beneath the surface, and adjust our behaviors to test and learn from different approaches. I believe that individuals, groups, and organizations mature by learning from reflecting on their experiences putting their expertise into play. However, I am aware that in philanthropy, the very word "reflection" can be viewed as self-indulgent, navel-gazing, and, potentially, a time-intensive roadblock to action.

Key Points

- What are the roadblocks that limit reflective practice in the field of philanthropy? Between the desire to move the needle on social change and the pressure to be productive, philanthropy as a field is understandably driven to focus on doing and resistant to taking time to reflect on practice. This article is designed to help foundations encourage leadership and staff to put their expertise into play as a learning strategy.
- This article defines reflective practice and traces roots and research that can inform its use. It also reports on interviews with philanthropy practitioners about how they use various reflective practice methods to navigate high-stakes situations.
- In an examination of some of the barriers to learning on the job in philanthropy, this article also suggests some activities that might build a more receptive environment for reflective practice for individuals, groups, and organizations.

The resistance to taking time to reflect on practice is understandable. The "fierce urgency of now" that drives social-change organizations is very real and has only intensified since Rev. Dr. Martin Luther King, Jr. (1963) declared that tomorrow is today for finding effective responses to social injustice and inequity. Even in organizations without a social mission, there can seem to be a lack of time for reflection. "In our daily battle against the clock, taking time to reflect on one's work would seem to be a luxurious pursuit" (Di Stefano, Gino, Pisano, & Staats, 2014).

A lot of the most challenging work for philanthropy practitioners — work that requires adaptive learning — takes place not on high-speed expressways, but on back roads that are hard to navigate, where there are no maps, and where you cannot reach your destination on your own. These back roads are philanthropy's most important learning terrains.

Between the desire to move the needle on social change and the growing pressure in all work to be productive, philanthropy is understandably driven to focus on doing. It's also not surprising that the field turns to such planning and evaluation tools as scorecards, logic models, and theories of change when it comes to learning about doing. And why not? These metrics are like signs on the highway: They let us know if we are getting somewhere.

But here is the problem: A lot of the most challenging work for philanthropy practitioners — work that requires adaptive learning — takes place not on high-speed expressways, but on back roads that are hard to navigate, where there are no maps, and where you cannot reach your destination on your own. These back roads are philanthropy's most important learning terrains. Practitioners find themselves managing conflicts among partners in a collaborative group, or might face unexpected resistance to a new idea coming from their board. They may find themselves stuck while creating a proposal with a grantee, and are responsible when implicit bias leaves key players out of the picture. Those are just a few of the hardy perennials that pop up when practitioners are asked, "What aspects of your work keep you up at night?" Most practitioners, regardless of position or tenure, report that they ill-equipped to learn from these experiences in ways that will lead to better outcomes.

I believe that learning on the back roads is largely absent because practitioners in philanthropy have two big jobs — but are only resourced and prepared for one of them.

The first job is the "what" of the work, whether it be human resources or human rights. For learning the "what" of the job, there are professional associations, philanthropy-serving organizations, and gatherings with grantees. Foundations often support staff in learning the "what" of their work through underwriting the cost of attending conferences and organizing gatherings among partners.

The second job is the "how" of the work — putting one's expertise into play. Learning the "how" has traditionally been a deeply personal and private experience. Professionals usually have some way of making sense of how they work in challenging and uncharted terrain, but that way is largely unspoken and, therefore, can easily go unexamined. The landscape for learning is not completely arid, of course: Philanthropy-serving organizations offer one-off sessions on this topic at conferences and skill-building seminars, learning officers at larger foundations find themselves cataloging practices and ways of learning from them, and there are informal learning groups that spring up after cohort experiences to foster continued sharing. However, developing and sharing reflective practices for learning how to navigate these back roads is not approached as a discipline in the same way as learning the "what" of the work.

Could philanthropy encourage individuals, alone or in groups, to shift from the "how" as a private experience to an open engagement with others for the purpose of learning to navigate those back roads? Is there promise in linking this openness to building organizational and fieldwide knowledge that could improve working internally and with partners?

A Minicase: Discovering the Value of Reflective Practice in Philanthropy

Over the past 40 years, I have done some testing and sharing of reflective practices for learning purposes in philanthropy at the organizational and field levels. As a program officer at the Ford Foundation, I was encouraged by Susan Berresford, then the foundation's vice president for programs, to turn my frustration with the absence of on-the-job dialogue into an exploration of how colleagues learn to navigate complex situations together. Berresford authorized me to interview foundation staff across fields and geography about what they were learning about their practice of managing common but critical programming dilemmas. We looked for patterns across stories about scaling up, authentic co-creation of strategy, and helping struggling projects and organizations. We gathered for informal yet semistructured conversations that spanned not only programs and geography, but also organizational hierarchy. The combination of good food and leadership that showed up in an explicitly peer role ensured foundationwide participation.

Individual program staff told me that they had not thought much about the "how" of their work as a discipline, and said they found it very useful to detach from the action, look at the dynamics of situations that had not gone as well as they wished, and compare their observations with those of colleagues in other fields and countries. We learned from one another in the moment. The knowledge generated from those conversations included noticing patterns of good practice that led to new thinking about how to organize our work. Individual learning became group learning and, in some cases, organizational knowledge that could then be shared through onboarding programs or even used to address gaps between espoused ways of working and actual behavior.

After most interviews and related workshops, practitioners would remark that these exchanges helped them clarify what they were learning from their practice and adapt new techniques for approaching their work.

Later, again thanks to support from the Ford Foundation, I was able to interview program officers in all kinds of foundations across the world about dilemmas they encountered, how they made sense of them, and what they did to adjust their behaviors to improve the "how" of their work. After most interviews and related workshops, practitioners would remark that these exchanges helped them clarify what they were learning from their practice and adapt new techniques for approaching their work. Candid[1] continues to offer the 30 GrantCraft guides that came from that project, as well as new ones. These reflections on practice are reported by new readers to be relevant to their experiences putting expertise into play.

Reflective Practice as a Tool for Individual and Group Learning

More recently, The Giving Practice has been looking into what role reflective practice might play to help practitioners engage in individual and collaborative learning on the job. Our curiosity about adding this type of reflection into the busy schedules of professionals is tied to our own use of reflective practices as consultants, what we have read in the literature from other fields, and, most important, what we have learned from practitioners about what is needed to create individual and group knowledge when there is no one right answer or technical solution to a problem. We've come to see that reflective practices

[1] Candid is the name of the new nonprofit formed jointly in February 2019 by Foundation Center and GuideStar.

FIGURE 1 Reflective Practice Methods: Examples

EXAMPLES OF

Reflective Practice Methods

- **Clarify roles** with teams to match the needs of complex situations.
- **Enlist peers** to compare approaches to a dilemma.
- **Use a consultative stance** (e.g., How can I help?) versus a reactive one (e.g., How can I protect?) to advance knowledge.
- **Invite stories, images, and metaphors** that help illustrate different perspectives on a problem or solution.
- **Pause activities for joint exploration** of what might be happening "beneath the waterline" when a conversation or project flounders.
- **Build time into meetings** for individuals to write and compare notes on observations, questions, and preparedness for next steps.

These are some of the methods used by practitioners who contributed to *Philanthropy's Reflective Practice Guide* (Jaffe, 2018).

can be used alone, to improve personal behaviors and strategies, and with others, to build more authentic relationships and get to outcomes that are based on collective insights. (See Figure 1.)

We are defining a reflective practice as a semi-structured process: observing what is happening within and around oneself and others, making collective meaning of what is observed prior to making decisions, and adjusting behaviors and strategies to test and learn ways to get to better outcomes. An invitation to observe can create mental space before decision-making in a high-stakes situation. Simple techniques for sense-making alone or in groups can invite insights into the dynamics beneath the surface of a conversation or situation, and thereby add insight into a failing strategy or a stuck dialogue. Purposefully choosing to adjust behaviors — from shifting roles to changing tactics or strategy — to test a new approach invites learning, interrupts conditioned responses, and can lead to different outcomes.

In our interviews and consulting, my colleagues and I have observed that reflective practices work for individual learning but are especially useful for group learning. We find ourselves testing this hypothesis: If philanthropy practitioners learn reflective practices that they can use with others before, during, and after situations they find challenging and therefore intellectually and emotionally significant, they then will discover learning in action that is adaptive, relevant, contextualized, and lasting for themselves, their teams and partners, and, perhaps, their organizations. This hypothesis is informed by four assumptions about how reflective practice works to advance learning on philanthropy's back roads:

1. Practitioners avoid learning on the job because they fear it will take too much time away from getting the work done. Reflective practice can disrupt the avoidance of learning from experience and the pressures from the "fierce urgency of now" by opening a space for authentic communication as a way to inform what actions to take.

2. Practitioners who apply reflective practices become more confident and deliberate about engaging partners and groups to reflect for better learning together.

3. Better group learning comes from authentic communication, sense-making, and creating meaning. Because reflective practice facilitates authentic, meaningful communication between individuals, use of reflective practice methods helps groups create and exchange knowledge, which is deeper and more meaningful than merely learning information.

4. When meaningful knowledge is shared, groups attain the preconditions of trust and collective understanding that precede problem-solving in challenging situations.

The use of a reflective practice as a tool for individual learning as well as building shared knowledge in real time is an idea that we'd like to see further explored. We think this is particularly important for a field like philanthropy, where much of the core work takes place in communities outside the organization. Could a foundation encourage reflective practice to help practitioners bring what they learn in the field back home to build shared knowledge? For example, a team working on a multidisciplinary initiative could be asked to take five minutes at the end of site visits and other partner meetings to write about any challenges that have come up in the work. This could be done with grantees as well as separately, among the different partners. At monthly meetings, staff can break up into small groups and share dilemmas as a way to learn how others have handled similar problems, then report back to the whole group on the kind of problems that arose and look for patterns. Not only will individual staff members be learning from presenting and consulting on dilemmas, but the group as a whole will surface learnings that might suggest strategy adjustments or building out skills development. Information about approaches that worked could be shared with other teams at larger meetings and used in onboarding programs to orient new staff.

Reflective practice might be relatively new to philanthropy, but it has a rich and varied intellectual tradition. Reflective practice is not a technical term with a single definition or one way of integrating doing and being in the world.

Given that some researchers believe collective learning drives individual learning (Rashman, Withers, & Hartley, 2019), we wonder whether reflective practices can function as an essential link between individuals and a collective group. Also, given that knowledge creation and learning occur when mere information attains greater meaning and value (Lee, Goh, & Chua, 2010), we speculate that reflective practice can act as the bridge that facilitates making sense of complex situations, thereby getting individuals closer to deeper learning.

The Bigger Picture: Reflective Practice Roots and Research

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intellectual tradition. Reflective practice is not a technical term with a single definition or one way of integrating doing and being in the world. For the purposes of this article, we are highlighting a few 20th-century philosophers who have influenced thinking about reflective practice in the workplace. But it is important to note that they are standing on the shoulders of much earlier philosophers and spiritual leaders who are not always acknowledged.

John Dewey, a leader of progressive education reform in the United States, advocated an approach to inquiry that encouraged questioning assumptions and reflecting on experience (Smith, 2001). Scientist Michael Polanyi explored the tension between reasoned and critical thinking and other, more "tacit" opinions and assumptions that form the base of organized knowledge. He advocated open dialogue in scientific communities to encourage discovery and combat hidden resistance to changing opinions that are closely held but not openly discussed (Smith, 2003).

This theme of how professionals "know in action" is core to the work of management theorist Don Schön of MIT, whose work opened up exploration of reflective practice in the social sciences. A student of Dewey's theory of inquiry, his case writing about architects, counselors, consultants, and other professionals at work shaped current thinking about the theory and practice of learning in organizations. Schön differentiated between the discipline required for technical problem solving and what is necessary to confront situations where there is more uncertainty and ambiguity about the right answer:

> The practitioner allows himself to experience surprise, puzzlement, or confusion in a situation which he finds uncertain or unique. He reflects on the phenomenon before him, and on the prior understandings which have been implicit in his behavior. He carries out an experiment which serves to generate both a new understanding of the phenomenon and a change in the situation. (Schön, 1983, p. 68)

Schön's conceptual frame for reflective practice influenced this article in several ways. While, with business theorist Chris Argyris and others, he developed many useful tools and techniques for reflection, he resisted making it one thing. "Reflective practice is a dialogue of thinking and doing through which I become more skillful," wrote Schön (1987, p. 31). We think the beauty of reflective practice lies in this invitation to be continually learning how to integrate being and doing as a lifelong discipline.

Ellen Schall (1995), former dean of the New York University's Wagner School and a public service practitioner, points to Schön's use of the term "swampy lowland" as the terrain for problems of the greatest concern to clients and to society, and his comparison to "hard, high-ground" problems which, while of real, technical interest, are often less likely to be most useful in addressing social problems. Schall suggests public service professionals must learn to love the work that takes place in the swamp in order to be of use to those they serve (p. 206).

The swamp is another way to look at the backroad dilemmas that preoccupied our interviewees. We think practitioners would recognize the difference between high-ground problems, which are often more about the "what" of their jobs, and the lowland problems, where what must be navigated is "how" to put their expertise into play.

In health, education, social work, and management fields, there is a vast amount of current writing on reflective practice. The research on its efficacy based on empirical studies is modest (White, Fook, & Gardner, 2006), with more focus on student learning in the classroom than on-the-job learning in the workplace. But a few findings about the use of reflective practice in workplace settings might be relevant to the field of philanthropy:

1. *Time to reflect might improve performance of individuals and groups*. In a lab and field test, individuals were engaged with "doing" a project and then spent a short time being consciously reflective about what they were learning. The reflection involved 15 extra minutes of writing about their experience with very little direction about what to write or how to reflect. The research indicated that even small investments of time spent thinking can significantly enhance the learning process. In the field test, in a business setting around learning a new technique, the reflection group increased its performance by 22.8 percent over the control group. In terms of collective learning influencing individual learning and vice versa, the group that shared reflections in person for five extra minutes were 25 percent better at internalizing the learning than the control group (Di Stefano et al., 2014). In some of our interviews with philanthropy practitioners, this paradox surfaced when people noted that reflection on their practice made them more productive.

2. *Reflective practice may be a catalyst for organizational learning*. Hilden and Taikkämaki (2013) argue that the impact of reflective practice on learning inside organizations could be amplified if it was seen as contributing to knowledge management systems. They found the following:

   > Learning-oriented studies focus on the human factors of reflection and are imprecise regarding the power and impact mechanisms of the surrounding control system. In a similar vein, management studies search to understand the role of control in learning; yet, they tend to overlook the established theoretical notions in the individual and collective psychology of learning. Our argument is that an empirical investigation of reflective learning with an analysis of all three dimensions ([i.e.], individual, collective, and organizational learning), alongside combining cognition and action is both valuable and needed (p. 91).

   These researchers propose new case studies to build what they call a "more analytical understanding of the intuitive hypothesis [that] reflection should not be a separated work task, but a shared value in organizational strategy and legitimized practice" (Hilden & Taikkämaki, 2013, p. 91). As philanthropy builds knowledge management systems, there could be opportunities to incorporate learning through reflective practice as well as lessons learned from narrative reports, scorecards, and other metrics. For example, imagine program officers writing about their stretch challenges during a site visit, or forming a new partnership and inviting feedback across fields about how others have handled similar situations.

3. *Rather than seeing organizational learning only as a movement from individual to collective levels, the movement might also work in reverse*. Rashman et al. (2009) cite several researchers who see "collective learning driving individual learning," who "perceive social and interactive processes as shaping group and individual cognitive perspectives," and who "describe interaction as the basis of simultaneous knowledge construction and transfer. Interaction can develop shared meaning and perspectives, which is the basis of knowledge" (p. 477).

Through this lens, reflective practice is not just in service of individual learning. Rather, it might help facilitate connection externally with others, in a group setting. The connection is the precursor to group learning. In other words, reflective practices could enable a group to learn collectively as they encounter the bumps in the back roads. And in that process, individuals learn as well. For example, a group might clarify and assign roles before a meeting starts, and then check in on whether that advanced learning toward the task at hand, and how. Doing so could build new knowledge in the group, and might also help individuals mobilize and manage themselves in a role, thereby building personal knowledge.

Practitioners consistently reported that using reflective practices deepened their working relationships. In most cases, practices enabled collaborative testing of new approaches and strategies. Interviewees often noted that their practices helped balance power differentials and achieve unexpected solutions.

Application of Reflective Practice in Philanthropy

The Giving Practice interviewed more than two dozen practitioners, who reported what they did to help themselves and others learn from challenging experiences and get to better outcomes in terms of both relationships and shared goals. Their stories were rich and similar to what arises in consultations or what can be found from GrantCraft. The challenges described almost always included partners — internal teams, grantees, or board members. Practitioners consistently reported that using reflective practices deepened their working relationships. In most cases, practices enabled collaborative testing of new approaches and strategies. Interviewees often noted that their practices helped balance power differentials and achieve unexpected solutions.

Four core reflective practice methods were most commonly and effectively used:

Practice No. 1: Paying Attention to Role

A common element in practitioners' stories was developing techniques to discern and take up whatever role needed to match the task at hand. By role, they were not referring to their position in the organization, but rather to their part in a challenging situation. "Role" in their stories represented all the uncodified behaviors they had to explore and expect of themselves to accomplish a task, even those they preferred to avoid or that were counter to their position. Organizational theorists at CFAR define "role" as that which authorizes you to do the work. In that sense, it is a practice that can help you manage vulnerability when you are in a new or uncomfortable position (L. Hirschhorn, personal communication, n.d.).

Gail Christopher (2018), founder of the W.K. Kellogg Foundation's Truth and Reconciliation Program, described some of the challenges involved in working with policymakers to do a deeper dive on questions of equity when they have been trained to approach problems as technical ones. The program's process was personal as well as professional. Christopher said she knew it would work, but faced a skeptical group. To persuade them get on board, she explicitly clarified her role as making time for discussion of the emotional side of the work as well as identifying the measurable steps that needed to take place. She asked for their buy-in to help her hold that space, even though she recognized that they might not appreciate it at first. This allowed policymakers to gain new knowledge from their personal experiences with equity as a group, knowledge that in turn helped shape policy reforms.

Katie Hong (2017), director of the youth homelessness program at the Raikes Foundation, told a story about supporting a highly visible project that was floundering and her need to pay attention to her own disappointment, frustration, and fears about the impact of possible failure. At the same time, she was organizing a way to work with an outside facilitator to help unpack what she called "the collective we" had built. In the role of a participant in the process, she could encourage herself and others to detach and look at the whole system to search for improvements instead of fixing blame on one part of the system. By explicitly inviting a collective review of the whole system, she constructed a reflective practice bridge for everyone to use in moving from a difficult experience to a learning experience.

We construct roles all the time, often without even thinking about it. In challenging situations, it is useful to treat role construction as a reflective practice by identifying the primary task and the appropriate role: Does this situation require a mediator, a closer, a critical friend, an active listener, an analyst, or an advocate? This moment of toggling between task and role to get the correct calibration can be a helpful tool in all kinds of conversations, but especially where there is ambiguity about a task (e.g., site visits or collaborating on a proposal) or when a group is encountering a roadblock to achieving a goal.

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Practice No. 2: Practicing Presence

Practitioners described techniques that helped them and others learn to "press the pause button" before or during an important meeting to reflect or review before taking an action or making a decision. Some said they used their daily commute for silent reflection, or calendared five minutes of quiet time between scheduled meetings. To facilitate an after-action review practice, another interviewee wrote down positive and negative reactions to calls and meetings during the day.

Headwaters Foundation CEO Brenda Solórzano (2018) developed a practice with her board to help strengthen the relationship between strategy and the foundation's newly minted social justice values: The board reviewed its values out loud at the beginning of each meeting. While it seemed forced and awkward at first, she reported that it enabled board members to more readily and explicitly apply the values to some unexpected and challenging situations. June Wilson (2017), former CEO of the Quixote Foundation, would ask her board and staff to stop conversations to reflect in the moment when she sensed — often physically — that they needed to test assumptions and feelings tied to a conversation first in order to make a good decision.

A contemplative practice can condition the climate to integrate thinking and doing. The U.K.-based Mindfulness Initiative (2016), citing a range of research, defines mindfulness as "an inherent human capacity akin to a language acquisition, a capacity that enables people to focus on what they experience in the moment, inside themselves as well as in their environment, with an attitude of openness, curiosity, and care" (p. 7). Organizational theorist William A. Kahn (1992) developed the concept of psychological presence as core to helping people "express thoughts and feelings, question assumptions, innovate" in their roles at work. "Presence creates conditions of trust and safety that allow difficult conversations to be engaged and worked through such that individuals learn and grow and their systems become 'unstuck'" (p. 323).

Practice No. 3: Letting the "Right Brain" In

In cases where analysis of a problem was by itself insufficient to clear a barrier to getting the work done, some practitioners introduced "right brain" activities — e.g., drawing, use of images or metaphors, reading poetry — to help groups surface unspoken assumptions, feelings, and opposing viewpoints that might aid in the navigation of back roads.

Doug Stamm (2018), former CEO of the Meyer Memorial Trust, described shaking up a long-stuck conversation, taking place during several

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years of meetings and learning tours, about the pros and cons of taking on mission-related investments (MRIs). At a gathering of investment advisors and the trust's board, he distributed a mock edition of the local newspaper that contained "coverage" of Meyer's investments in tobacco and support for treatment of children with cancer. Reading a headline and front-page story of a fake paper, even with the full knowledge that the story was not real, helped stimulate a more authentic conversation about the costs and benefits of MRIs — and catalyzed a policy change.

At the Center for Creative Leadership, Palus and Horth (2015) have written about their experiments with visual images to promote mediated dialogue that is a form of reflective practice. They refer to this technique as "putting something in the middle" of conversations to help reduce the anxiety and defensiveness inherent in contexts such as leadership development and social transformation and sustain attention to what is hard to talk about (p. 692). They hypothesize that the images help groups go through the stages of observing, collectively making meaning, and adjusting behaviors while focused on a "third object," rather than getting stuck in defending their own assumptions or attacking those of others. Schön (1993) was also very interested in metaphors as another form of a mediated object that enables professionals to reflect on their practice.

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Practice No. 4: Enlisting Peers

Philanthropy practitioners described learning from semistructured group interviews in which they shared a dilemma and actively listened to how others handled similar situations. The presentation of a dilemma in this fashion gives practitioners an opportunity to detach from the heat of the moment. The technique often includes writing down the dilemma before talking about it; in doing so, practitioners report that they can see more that way than by simply telling their story. Some of the practices include metaphorically stepping away from the situation — turning away from the group to take notes on what it is discussing. In most cases, peers talk among themselves about their experience with a similar dilemma — what they did and what they might do differently now — instead of simply advising the presenter on a response. As a result, the listeners are invited to reflect and learn from their own experiences with one another.

Two CEOs from a cohort facilitated by The Giving Practice to advance diversity, equity, and inclusion (DEI) in their organizations shared how peer consults helped them learn to shift their board's thinking from anonymity to transparency as an inclusion strategy and, in another case, to see equity as an internal as well as external value (The Giving Practice, personal communications, 2015–2018). Ryan Chao (2017), vice president at the Annie E. Casey Foundation, used meeting time with his team for 30-minute peer consults on an individual challenge to allow everyone to reflect on what they have learned in similar situations. This helped combat some of the inevitable isolation in philanthropy, where much of the work takes place one-on-one and there are few opportunities for observation and feedback.

The use of peer consults in the workplace is often traced to research done by John Seely Brown, chief scientist for Xerox Corp. and director of the Xerox PARC research center. In the 1980s, Xerox hired ethnographers to figure out how its 21,000 technicians learned to solve day-to-day problems not addressed in the company's technical manuals. They discovered that the technicians learned by telling each other "war stories" that focused on sharing dilemmas they encountered alone on the job to build and discount theories about what works in different situations (Brown & Duguid, 1991).

This semistructured technique for learning from practice has been adapted by a number of training organizations familiar to philanthropy, including the Rockwood Leadership Institute, James P. Shannon Leadership Institute, the Center for Courage and Renewal's Heart of Philanthropy, Cambridge Leadership Associates, Liberating Structures, and Action Design. At The Giving Practice, we have observed that it doesn't take very long to transfer the knowledge about how to create and sustain a peer consult to a group.

What Is the Roadblock That Limits Reflective Practice in Philanthropy?

If reflective practices are so useful to practitioners, why haven't they been widely adopted in the field of philanthropy? While some of our interviewees reported being part of a group that deliberately used reflective practices to learn from one another, it was not within their own organization. Few of the positional leaders in our interviews who use reflective practices themselves have tried to systematically introduce them into the structure or culture of their organization. It is almost as if the spirit is willing, but on a systems level the call to make reflection a discipline is weak. Why is this the case? What is it in the system that gets in the way? I offer two hypotheses.

If reflective practices are so useful to practitioners, why haven't they been widely adopted in the field of philanthropy?

First, all social systems — including philanthropy — have protective mechanisms. The business of philanthropy is to help solve difficult problems, many of them chronic and seemingly intractable and others that are acute and horrifying in their own right. Getting it right (defining the problem, identifying the foundation's comparative advantage to address it, etc.) is important. But on the ground, the work of getting it right is messy and often looks very different from the original strategy. It is difficult to acknowledge that an organization's investment may not succeed in moving the needle or that the solution to a problem is simply not clearly evident.

As humans, a default response is to distance ourselves from the messiness or even painfulness of an effort. Menzies-Lyth (1960), a psychoanalyst and organizational theorist, described how hospital systems develop defensive protocols that "help" nurses and doctors avoid the anxiety of working with very sick patients. As one example, she cited the practice of waking people up from badly needed sleep to take their temperature. There might be a similar dynamic to be found in philanthropy. Consider, for example, how grantee narrative reports can replace a badly needed conversation on the ground about what may or may not be working. It can be difficult to talk about what an individual, group, or organization might have contributed to a failed conversation, meeting, or strategy. Reflective practices create space for those conversations and the learning that emerges from them, but people have to trust that those practices will work and not make things worse. Could the focus on "what" philanthropy does rather than "how" we do it be a social defense against fears and worries about the work itself?

What might help the field of philanthropy test the value of reflective practices for individual, group, and organizational learning? My inclination would be to look for features in the current landscape of activities in philanthropy that lend themselves to different ways of testing and learning through reflective practice. Three areas come to mind: networks, newcomers, and learning by doing.

My second hypothesis involves "doing" versus "being" as a corporate image. The philanthropic model of private money for public good has built-in inequities at macro and micro levels that can stimulate all kinds of irrational behavior when it comes to how we want to be seen. Proof of value lies in the outcome of an investment. Too much focus on internal learning, even if the learning is intended to improve that outcome, can be perceived as self-indulgent. This belief manifests itself in a commonly held, zero-sum argument that a dollar for staff development is a dollar less for grantees. The desire to keep overhead low and our eyes on the prize is a good thing. Still, might the attitude that some investments are excessive stem more from concerns about appearances than from the expense's ultimate impact on grantees?

A Road Map for Testing and Learning From Reflective Practice

What might help the field of philanthropy test the value of reflective practices for individual, group, and organizational learning? My inclination would be to look for features in the current landscape of activities in philanthropy that lend themselves to different ways of testing and learning through reflective practice. Three areas come to mind: networks, newcomers, and learning by doing.

Network the Beacons of Reflective Practice Activity

There are bright spots throughout the landscape. There are individuals in the field who use reflective practices, but because they often work in different programmatic fields or in unrelated organizations, they do not come together to form a critical mass. However, some of these practitioners might be interested in learning new practices from one another. There are informal, self-organized groups across the country that provide this kind of support. Some groups are limited to CEOs and others include a mix of positions, but most have shared a leadership development or peer-cohort experience that has made them reflective practitioners.

To build a critical mass of people using reflective practices, these individuals and groups could be invited to learn from one another through meetings at philanthropy-serving organizations and/or webinars about the variety of ways they use reflective practices. This may produce a network for ongoing learning and raise the visibility of reflective practice as a tool for the field as members communicate with one another about what is being learned.

Introduce Newcomers to Reflective Practices

Most regional associations and some larger foundations offer onboarding opportunities that could include training in reflective practices by current members or staff who use them. Consultants could also be tapped to help with this training. Some philanthropy-serving organizations work with leadership training groups to offer skill-building workshops; if foundations helped underwrite these offerings, they could become regular programs. And human resources staff at foundations could use their existing networks to disseminate curriculum for training in reflective practices inside foundations.

Tools

Learn by Doing

There are a few potentially transformative strategies in philanthropy where testing and learning through a reflective practice lens might be valuable to advancing that work:

- More foundations are exploring how DEI goals impact how they work internally and with grantees and partners.
- There is renewed interest among foundations with partners and grantees to discover the "how" of collaborating across the boundaries of different kinds of organizations.
- With the increasing presence of learning officers inside foundations, there is new interest in informal as well as formal learning from program and organizational strategy.

These are the types of efforts that require learning in action. The roads are not well traveled, and there is much work left to do translating experiences into signals and knowledge. Philanthropy could support research that offers teams working on these strategic initiatives, inside or across foundations, the opportunity to choose from a variety of reflective practices to help them advance the work. If process and outcome evaluations are built into the plan, we can learn whether reflective practices make a difference.

A road map makes it easier to travel on back roads. By amplifying the voices of those already using reflective practices, treating reflective practices as a teachable discipline for newcomers, and learning whether and how these practices can sustain organizational goals like DEI, collaboration, and learning across silos, we will be offering guides that can help practitioners learn as individuals and groups while they are traveling the back roads that are part of most critical experiences in philanthropy.

By amplifying the voices of those already using reflective practices, treating reflective practices as a teachable discipline for newcomers, and learning whether and how these practices can sustain organizational goals like DEI, collaboration, and learning across silos, we will be offering guides that can help practitioners learn as individuals and groups while they are traveling the back roads that are part of most critical experiences in philanthropy.

Acknowledgments

I want to express my thanks to peer readers who reviewed drafts and offered very helpful feedback, and to my colleagues at the Giving Practice, Mark Sedway and Pat Vinh-Thomas, for engaging in generative thinking and honest critique throughout the process of writing this article.

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