

The Foundation Review

Volume 11
Issue 1 *Foundation Learning - Open Access*

3-2019

Challenges and Opportunities in Philanthropic Organizational Learning: Reflections From Fellow Grantmakers

Jennifer Chubinski
Interact for Health

Kelley Adcock
Interact for Health

Susan Sprigg
Interact for Health

Follow this and additional works at: <https://scholarworks.gvsu.edu/tfr>



Part of the [Nonprofit Administration and Management Commons](#), [Public Administration Commons](#), [Public Affairs Commons](#), and the [Public Policy Commons](#)

Recommended Citation

Chubinski, J., Adcock, K., & Sprigg, S. (2019). Challenges and Opportunities in Philanthropic Organizational Learning: Reflections From Fellow Grantmakers. *The Foundation Review*, 11(1). <https://doi.org/10.9707/1944-5660.1454>

Copyright © 2019 Dorothy A. Johnson Center for Philanthropy at Grand Valley State University. The Foundation Review is reproduced electronically by ScholarWorks@GVSU. <https://scholarworks.gvsu.edu/tfr>

Challenges and Opportunities in Philanthropic Organizational Learning: Reflections From Fellow Grantmakers

Jennifer Chubinski, Ph.D., Kelley Adcock, M.P.H., and Susan Sprigg, M.P.H., *Interact for Health*

Keywords: *Organizational learning, strategic learning, evaluation, reflecting on learning in philanthropy*

Introduction

As the field of philanthropy has matured over the past couple of decades, increasing attention has been paid to evaluating the impact of philanthropic investments. Twenty years ago, in fact, Easterling and Csuti (1999) saw this trend emerge and remarked that evaluation in the philanthropic sector had moved from often non-existent to slightly more sophisticated. They also recognized that grant evaluation for basic accountability — did the grantee do what they said they would do — is a standard practice at most foundations.¹ Beyond accountability, evaluation is used as a tool at many foundations for assessing and understanding the outcomes and impact of a cluster of grants, programs, or strategies. Finally, in recent years the scope of evaluation has expanded to include strategic learning, which focuses on real-time learning and “the use of data and insights from a variety of information-gathering approaches — including evaluation — to inform decision-making about strategy” (Coffman & Beer, 2011, p. 1).

In the two decades since Easterling and Csuti’s article, evaluation that is focused on grantmaking and strategy has become a more common practice at foundations. However, the practice of turning the lens inward, to engage in organizational learning within foundations, is still nascent. And while foundations are getting better at sharing successes in organizational learning, the field does not often stop to reflect and share the lessons learned, failures, and opportunities for improvement in the process of

Key Points

- As the field of philanthropy has matured, increasing attention has been paid to evaluating the impact of philanthropic investments. In recent years, the scope of evaluation has expanded to include an intentional focus on organizational learning with the goal of learning from ongoing work, informing decision-making, and ultimately improving impact.
- With this momentum to carry out organizational learning strategies and share successes, the sector has not yet stopped to reflect on challenges and lessons learned in the process of building the capacity for organizational learning — the messy yet meaningful middle between a desire for learning and the implementation of programming.
- Based on interviews with learning, evaluation, and research staff in philanthropy across the country, this article shares stories from the field on lessons learned and mistakes made in philanthropic organizational learning. It identifies points of struggle and opportunities for improvement in organizational learning, as well as what can be learned from mistakes in the process.

organizational learning. The authors embarked on this project to start this conversation, and to hear about both the roadblocks to good organizational learning at foundations and the ways to clear those hurdles.

¹This is also reflected in personal communications with all members of the network of learning, evaluation, and research staff in philanthropy consulted for this article.

TABLE 1 Four Elements of Organizational Learning

<p>Supportive leaders: Leaders are committed to organizational learning</p>	<ul style="list-style-type: none"> • Clear vision and goals for organizational learning • Champions and role models
<p>Culture of continuous improvements: Culture values organizational learning</p>	<ul style="list-style-type: none"> • Aligned beliefs and values • Reinforcing incentives • Commitment to measurement of results
<p>Intuitive knowledge processes: Organizational learning processes are embedded into daily workflows</p>	<ul style="list-style-type: none"> • Defined processes to set learning agenda and capture, distill, apply, and share knowledge • Technology platforms
<p>Defined learning structure: Organizational structure is aligned to support organizational learning</p>	<ul style="list-style-type: none"> • Defined roles and responsibilities for capturing, distilling, applying, and sharing knowledge • Networks and coordination

(Milway & Saxton, 2011, p. 47)

Note: For sources of background material cited by Milway and Saxton for their model, see GEO, 2007; Hamilton et al., 2005; and Gupta & McDaniel, 2002.

What Is Organizational Learning?

This article relies on Milway and Saxton’s definition of organizational learning: “the intentional practice of collecting information, reflecting on it, and sharing the findings, to improve the performance of an organization” (2011, p. 44). Organizational learning is an internal examination of what the organization is doing, how it is doing it, and how well it is doing it. The goal of this kind of learning is to propel the organization forward by improving work processes, to inform decision-making at all levels of an organization, and, ultimately, to sharpen the impact of the organization’s work on the external world.

The concept of organizational learning is relatively new to philanthropy. While there are numerous reports available in the grey literature (Hamilton et al., 2005; Putnam, 2004; Grantmakers for Effective Organizations, 2016, 2014b) — very few of the peer-reviewed articles that do exist focus specifically on organizational learning within philanthropic organizations.

One often-cited resource on learning, evaluation, and philanthropic culture is the work carried out by Grantmakers for Effective Organizations

(GEO). Many of the individuals interviewed for this article identified GEO’s work as important to their individual and organizational learning. GEO’s description of a learning mindset is particularly helpful:

Learning is supported by effective evaluation practices, inquisitive and reflective organizational cultures, strong leaders dedicated to driving improvement, the willingness to bring key partners into the conversation about what’s working and what’s not, and a commitment to use data and information to inform decision-making and take action. (GEO, 2014a, para. 4)

Other resources suggest elements necessary to create an effective learning organization. *The Smarter Grantmaking Playbook* (GEO, n.d.) outlines seven core characteristics of foundations that influence learning; Milway and Saxton (2011) offer “Four Elements of Organizational Learning.” (See Table 1.)

These descriptions illuminate what it takes to be an effective learning organization. In practice, internalizing and embodying these characteristics is often a challenge.

This project was designed as an opportunity for foundation colleagues with a strong connection to organizational learning to have conversations that allowed them to be honest and transparent about their organizations' learning journeys and the specific successes, challenges, and pitfalls along the way. There is a lot to be said by, and a lot to be learned from, peers.

When Organizational Learning in Philanthropy Falls Short

Traditionally, philanthropic dissemination and sharing has focused on the successes: where grants have succeeded and where programs have prevailed. Ten years ago, GEO and the Council on Foundations (2009) reported that an increasing number of grantmakers were also trying to embrace their failures, recognizing that as much is learned from failure as from success. For example, the 2017 GEO Learning Conference included a “Fail Fest,” where participants heard “candid stories from four grantmakers on their favorite failure and hard lessons learned” (para. 3). And in their article “Lessons (Not Yet) Learned,” Darling & Smith (2011) offer a list of foundations that publicly shared their evaluation findings on large and very public failures.

At its core, discussing failure in grantmaking is about learning in order to improve and avoid the same mistakes next time. While foundations have begun to publicly discuss these failures,

however, we have not yet applied this same failure lens internally, to the process of organizational learning. What challenges, lessons learned, and mistakes have been made by foundations trying to integrate learning practices into their organizations? Where does organizational learning in philanthropy often fall short?

This project was designed as an opportunity for foundation colleagues with a strong connection to organizational learning to have conversations that allowed them to be honest and transparent about their organizations' learning journeys and the specific successes, challenges, and pitfalls along the way. There is a lot to be said by, and a lot to be learned from, peers.

Methods

Sixteen semistructured phone interviews, lasting 45 to 60 minutes, were conducted in July and August 2018 by two members of the research and evaluation team at Interact for Health, a foundation based in Cincinnati, Ohio. Because of the provocative nature of the interviews, a snowball sampling² methodology was used. Email invitations were sent to 18 learning, evaluation, or research foundation staff with whom one of the two interviewers had an existing relationship; the invitation explained the authors' interest in a candid conversation about the strengths and weaknesses of their organizational learning experiences. As a result of suggestions from initial interviewees, an additional six participants were invited and interviewed. Of the 24 people contacted, 16 completed interviews. Thirteen participants were current foundation employees and three were former foundation employees who now provide consulting services to the sector. Four interviewees requested that their participation remain anonymous.

Interview questions were designed to develop rapport, establish the context of the participant's role and experience in the organization, and provide multiple and diverse opportunities to discuss their successes in and challenges with organizational learning. (See Appendix 1.) After

²Snowball sampling is a nonrandom sampling technique where current study subjects help to identify additional study subjects. For this study, each participant was asked, “Who else do you think we should talk to?”

the interviews, all participants were given a chance to review and edit interview notes; several also reviewed the final draft of this article. A third author then coded the interview notes and performed a thematic analysis, using an inductive approach.³ All three authors reviewed and confirmed the accuracy of the analysis.

Results

Participants received interview questions that fell into four broad categories:

- their current structure and process for organizational learning;
- successes in and facilitators of their experience of organizational learning;
- challenges, failures, or struggles experienced during the process; and
- advice to other foundations wanting to engage in or strengthen their organizational learning practices.

Participants shared a fascinating breadth of experiences and stories as they and their organizations have made efforts to effectively learn. In these stories, four distinct areas emerged where action and intention are necessary to avoid significant challenges that, if not anticipated and managed, can derail good intentions for learning: 1) executive leadership and resources for learning, 2) a strong culture of learning across the organization, 3) staff roles and relationships to support learning, and 4) processes and tools to help facilitate learning.

Each of these themes will be explained in detail and with examples from participants. Although the authors set out to identify challenges and failures in organizational learning, participants went one step further, acknowledging the challenges and then offering suggestions on how to plan for, manage, and structure organizational

Although the authors set out to identify challenges and failures in organizational learning, participants went one step further, acknowledging the challenges and then offering suggestions on how to plan for, manage, and structure organizational learning practices with the goal of facilitating success in the future.

learning practices with the goal of facilitating success in the future.

Executive Leadership and Resources for Learning

Support from leadership is identified throughout the literature as a critical component of most successful initiatives, including organizational learning. Realizing this support, however, may be challenging. As GEO notes in *The Smarter Grantmaking Playbook*,

It is crucial for the board and senior leadership of a foundation to make the necessary changes and commitments that develop an organizational culture that fosters learning. This means prioritizing learning work by both embedding it in our personal habits as well as the processes of the organization as a whole. (2014b, para. 10)

In participant interviews, top-down support for organizational learning was one of the most frequently identified necessities for success in organizational learning. Within this category, three subcategories emerged: visible and active support for organizational learning; allocation

³An inductive approach to data analysis involves review of the data with no predetermined assumptions about context and meaning. This means that all of the interviews were reviewed and coded on their own, and general categories were created from the interview results and not from predetermined assumptions of the authors.

of organizational resources, such as staff, time, incentives, and funding; and communicating clear goals and a vision for organizational learning that aligns with the organization's goals.

Visible and Active Support by Leadership

Engaging leadership as an ally in learning was a strong recommendation from multiple interview participants. This support needs to be both visible and active. The participants, however, reported challenges more frequently than successes in this arena. One stated that the CEO of their organization believes that learning is part of everyone's job, and identified that as a success. But there were difficulties getting to this positive position: the organization had started with mid-level staff members leading the learning and developed a thorough bottom-up approach, but not a robust a top-down approach. While the participant saw having those champions for learning within staff as critically important, in retrospect leadership should have been provided more guidance and support on how to be a champion of learning: "We have very supportive leadership, but didn't do enough to pull that through and drive further development of that broader culture piece. Leadership needed more guidance as well about how to be more visible in supporting these activities."

But another participant argued that starting from the middle could be a strategic choice: "They can push learning both up and down in the organization." Still, the importance of pushing learning "up" was specifically mentioned.

Several organizations were mulling a right-sized role for the board, with no clear consensus among interview participants. One regretted not investing more time to be sure key board members were more invested in the learning approach because, at this smaller foundation, they are "ultimately the continuity within the organization" — when executive leadership changed, some of the learning processes were lost. In contrast, another participant reported that their board was too involved; it was deeply engaged in all day-to-day processes of the organization, which made the work move very slowly.

One participant described a situation where the staff and CEO, having engaged in a robust learning process, presented the board with options for moving the organization forward. However, the board was removed from and mistrustful of the learning process, and chose to take a completely different path — one that staff felt was not supported by the evaluation results. In general, as a different participant observed, it is a "challenge to bring people along who are removed from the work on a day-to-day basis."

While there was no consensus on the ideal path to executive and board support, it was clear that such engaged support is important. As one participant said,

Learning feels most impactful when it makes its way up to the CEO or board. It is not just learning for the evaluation team, but causes framing, policies, and staffing structures at the executive level. In an ideal situation, the CEO has strong connections to the evaluation and learning function. The CEO has his/her own desire to learn and wants to grow and evolve, on both a personal and organizational level. Unfortunately, this is not typical.

Allocate Appropriate Organizational Resources

The visible and engaged support of leaders becomes actualized in the form of specifically allocated resources. Four overlapping resources were frequently mentioned:

1. funding to support learning,
2. time for the evaluation and learning staff to compile the learnings,
3. time for the organization as a whole to absorb and reflect on the learnings, and
4. incentives to learn.

Staffing and funding are closely related: The organization must be willing to fund learning and allocate staff to support it. This can be a challenge. Two participants acknowledged that there can be resistance to funding an evaluator

position if that move appears to take funding from programs serving the community.

Lack of time for the organization to learn was the most common concern, mentioned by half the interviewees. One organization reported that while it had obtained vocal support from leadership, it was still struggling because there was no time available to learn: “If learning isn’t valued from the top, no one is going to make time for it. We are valuing it; now we just need to make time.” Leadership is vital to making this happen. If leaders show they are willing to take the time, it is more likely to become accepted practice in the organization.

To demonstrate how the organization values learning, leadership can also provide incentives to the staff. “We don’t often incentivize reflection and learning,” one participant said; another pointed out, “If you really want [learning] to happen, you put that in staff objectives and evaluations. It must be intentional.” Without that focus, learning can easily become an “extra” that never rises to the top of the agenda.

Clear Goals and Vision for Organizational Learning

Finally, many participants discussed the challenge of successful organizational learning when a clear vision and sense of direction is absent, both for the organization and for the learning process. This was related to conversations around alignment: Learning that does not align with the vision of top leadership may not be successful.

One organization reported how oversight of the learning function moved from a vice president to the CEO. When under the vice president, learning happened within the vice president’s vision; but this did not align with the CEO’s vision for learning. The interviewee said,

I had a hard time anticipating the thinking of what the CEO wanted — because I was not in close enough contact to determine what the CEO wanted. ... If I could have done it all over again, the vision needed to be streamlined from the top down from the beginning. Learning needs to be connected with the executive’s vision.

[M]any participants discussed the challenge of successful organizational learning when a clear vision and sense of direction is absent, both for the organization and for the learning process. This was related to conversations around alignment: Learning that does not align with the vision of top leadership may not be successful.

Multiple participants discussed the goals for learning specifically within their organizations. As one interviewee noted, the opportunities to learn are extensive and it can get overwhelming quickly, so it is critical to be able to put aside the “interesting” and focus on what is most important at that point for the organization. For many, this was an area of success or clarity: Internally, staff and leadership had been able to come to consensus around the overall learning goals.

Interviewees mentioned a range of goals for learning among their foundations:

- Impact strategy.
- Shape future work.
- Learn if the organization is doing the right thing.
- Learn if the organization is doing it the right way.
- Inform the field.

All these goals are in areas where the leaders of an organization must be able and willing

As one participant stated, “the question of how do you turn the ship within an organization — it can’t happen without the culture piece coming along with it.” And in our interviews, many of the challenges and failures identified by participants can be linked directly to a mismatch between organizational culture and organizational learning.

to be vocal participants. Without support and resources — without a leader who values the foundation’s ability and responsibility to learn and change — organizational learning will be ineffective.

Strong Culture of Learning Across the Organization

An organization’s culture is defined as the aggregate set of expectations, attitudes, beliefs, values, and customs — written and unwritten — within the organization. And organizational learning culture has been widely identified as a critical ingredient for successful learning organizations. This was recognized two decades ago by Easterling and Csuti: “Foundation-focused evaluation requires an organizational culture that values learning and rewards experimentation, even when the experiment ‘fails’” (1999, p. 12). The importance of philanthropic culture has been recognized by GEO in its philanthropic culture work: “Cultural forces are powerful precisely because they exist under the surface and are rarely identified and addressed” (David & Enright, 2015, p. 7). Kennedy Leahy, Wegmann and Nolen (2016) also identify organizational

culture as an important ingredient in an effective strategic learning culture.

This sentiment was apparent in our research. As one participant stated, “the question of how do you turn the ship within an organization — it can’t happen without the culture piece coming along with it.” And in our interviews, many of the challenges and failures identified by participants can be linked directly to a mismatch between organizational culture and organizational learning. The comments, experiences, and stories related to organizational culture most frequently fell into the category of challenges, barriers, and failures; the participants identified culture as the source of the challenges to successful organizational learning. Their comments highlighted two defining aspects of learning culture: it must span all areas of the organization and it requires an openness to dialogue about challenges and failures.

A Strong Culture of Learning Is Organizationwide

A strong culture of organizational learning is, by definition, woven into the entire fabric of an organization. Many of the participants struggling with organizational learning reported that their foundation’s culture made such learning difficult. All reported being in a fluid state in terms of adopting this culture; it was widely recognized that changing a culture — which involves changing people and their behavior — is extremely difficult and takes time. Interviewees from several organizations said that a structure for learning should reflect the organization’s culture and structure, and that there should be opportunities for continuous improvement.

One foundation reported that its learning has continued to evolve because of what it called a “build and destroy phase” — a time of much change and reinvention — beginning in 2014 that has produced ongoing organizational shifts. While it started with no formal learning practices in place, the foundation has been able to reevaluate its organizational learning approach several times over the past five years. “It felt very natural for the organization,” the interviewee said, “since other departments

were cycling through various rapid-cycle learnings.” The foundation reports that its learning has remained somewhat inconsistent across its areas of focus, and that this is in part intentional because the learning team places an emphasis on creating “strong moments of learning in spaces where key decisions are imminent or there is a lot of uncertainty.”

In order for organizational learning to be effective, people need to see the added value of learning — beyond mere measurement. As one participant described it:

[The] value in unpacking the thinking, beliefs, mental models, and then applying evidence and pressure testing those, is core to learning. It’s not just about looking at data or dashboards; it’s the application of scientific thinking, hypothesis testing, critical thinking to the work, and bringing together thinking and evidence.

Another barrier to a strong organizational learning culture is poorly prioritized time. If the “thing due tomorrow” always takes precedence, it is hard for learning to rise to the top of the list. As one participant said, “If people don’t believe that learning is part of their strategy work, then it’s always the last thing on their agenda.”

Sometimes a learning culture is not what it seems. One foundation created a retrospective report (its first) on a whole body of its work that brought up missed opportunities; none of it was a surprise to the staff, who considered the report a fair and accurate representation. Yet when the report was presented to the board, its members were very upset: “This is wrong; how did you say we did a bad job? This is the best work the foundation has ever done.” The board’s reaction was a surprise to the staff; it had typically been more than willing to provide critical feedback on the foundation’s work. But board members were not ready to understand that the foundation had missed some opportunities in a major portfolio and, as a result, the report landed with a thud — the board could not hear the results. While the discord was unpleasant, the experience showed the staff that the board must be

A strong culture of organizational learning is, by definition, woven into the entire fabric of an organization. Many of the participants struggling with organizational learning reported that their foundation's culture made such learning difficult.

prepared in advance for a process of self-reflection, which may include an evaluation with negative results.

For a healthy learning culture to exist, learning needs to be valued by the whole organization. One former foundation evaluation officer said,

[When] the culture is conducive to learning, we see learning questions translated directly into appropriate RFPs, contracts, and evaluation methods; and the evaluation team is providing both process and outcome data that feeds decisions. Program directors also have an interest in learning and improving what they are doing at work. That organization has a true desire to learn — it permeates all parts of the organization. Evaluators simply fuel that learning fire.

Another foundation reported that its organizational learning is still very aspirational:

We’re still discovering the steps we need to take to get to where we want to go. Our organizational culture is not one of recognizing the different ways data can and should inform decision-making or organizational learning — we have to start where our organization is.

A healthy learning culture involves building relationships with staff across the organization, and sometimes those relationships are not with those in the positions with the most power. One foundation participant said that relationships with the

A healthy learning culture involves building relationships with staff across the organization, and sometimes those relationships are not with those in the positions with the most power. One foundation participant said that relationships with the administration team are critical to get items on the calendar and help to frame learning in a way that is meaningful to the foundation's administrators.

administration team are critical to get items on the calendar and help to frame learning in a way that is meaningful to the foundation's administrators. Another interviewee said it is important to "let your own interests go and let others advance their own learning agenda. You need to be more of a facilitator and not always a driver."

Openness to Dialogue About Challenges and Failures

An openness to challenges and failures within a foundation was a theme that emerged multiple times in interviews — sometimes as a reported success within the organization, sometimes as a challenge. Two participants made powerful statements based on their experiences: "Good organizational learning allows leadership to break the stranglehold of the idea that we did everything perfectly," one interviewee said. "A good organizational learning process can show that we weren't perfect, that we should learn, be self-reflective, and continue learning." Another observed:

Learning from mistakes requires letting go of ego, because the hierarchy within organizations and that power imbalance is a barrier to real organizational learning. Grow. Change. Try things and be OK with them failing.

Participants recognized how difficult accepting failure can be. "This is hard work and there isn't a great instructional guide," one interviewee remarked. "You need to be open to trial and error." Another said, "We keep making the same mistakes over and over again. Something is not working in our learning culture, and staff turn-over does not help with this." A third foundation, however, reported being able to make progress:

After working on our learning culture, we now talk more about challenges, we are more open about things that aren't going well. The benefit is that this leads to course corrections along the way. We are not waiting for a three- to five-year evaluation report. If our staff sees a challenge six months in, they do course corrections. They are talking about their learning and challenges with the board and the senior leadership team; there is more transparency now. For us it's become a self-fulfilling prophecy — there is more hunger for learning as we get better at it. At our next board meeting, we will be presenting learning reports for all of our strategies. These are one-pagers that will discuss the most significant challenges each strategy has faced and what staff are doing differently moving forward.

As observations from interviewees clearly confirmed, a culture of learning must be embedded in all parts of an organization, and the organization must embrace the fact that failure will happen.

Staff Roles and Relationships to Support Learning

While leadership and culture form the foundation of organizational learning, participants said that building the right staffing structure is essential for learning to become a reality in practice.

In their quest to understand strategic learning in philanthropy, Kennedy Leahy, Wegmann, and Nolen (2016) outlined various ways that foundations build and staff evaluation and learning functions and noted that "no one model

emerged as a clear example of how foundations could best structure these functions” (p. 28). They added that “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” (p. 34).

Our interviews support this, and the significance of all staff and their various roles in organizational learning emerged as a theme. While there are many ways to structure people and roles to carry out organizational learning, there are three fundamentals: ownership of organizational learning; clear roles and responsibilities to support learning for all staff; and an organizational structure that is right-sized, iterative, and purposeful.

Ownership of Organizational Learning

The majority of participants discussed the value of a person or people owning and facilitating the practice of organizational learning. These internal champions need the skills, resources, and authority to implement organizational learning processes and cultivate trusting relationships across organizational silos. As one participant observed,

If you don't have someone who is charged with pushing this forward, stewarding it along, then it won't happen effectively. Of course, learning has to be a part of everyone's role in some way, but if you set it up so that “everyone is responsible,” then actually no one will end up being responsible and it's tougher to make happen.

Most of the interviewees have evaluation, learning, and/or research positions in foundations, and many said that those roles were often either designed to facilitate and support the learning function or took on the learning function as their foundation went through organizational changes. Many foundations have formalized that learning function by adding the words “learning” or “strategic learning” to evaluation department titles. One participant also described the value of investing in opportunities for these staff to build their expertise and skills to carry

While leadership and culture form the foundation of organizational learning, participants said that building the right staffing structure is essential for learning to become a reality in practice.

out effective organizational learning: “Building internal and external capacity, experience, and soft and hard technical skills” is critical to what is often their role as the bridge builder for people across the organization.

Although the roles and responsibilities of the organizational learning facilitator varied, a few ways that this role can make learning meaningful emerged:

- *Help staff and leadership use learning to make better decisions.* Focus and tie learning to the next critical decision point. Ask the question, What are the things the organization needs to learn in order to make better decisions the next time?
- *Integrate learning into the regular business of the foundation.* When possible, use existing structures — program or staff meetings, the budget process, individual and organizational goal-setting time — to embed organizational learning.
- *Curate learning, knowledge, and evidence for staff, leadership, and the board.* Organize and package information in a way that allows people to work with it, reflect on it, and make decisions using it.
- *Provide time and space for reflection.* Sometimes, organizational learning requires dedicated and facilitated time and space of its own. This is often necessary

Participants consistently identified the importance of well-defined roles and responsibilities for all staff and informal or formal networks for organizational learning.

during times of strategic decision-making or organizational change.

At one foundation, the lack of dedicated staff to own and manage organizational learning made it challenging to execute in a coordinated way. Another interviewee described organizational learning as “still very aspirational for us. ... Progress really depends on the program officer in each area. We are making a lot of progress where there is a champion.” Many participants noted that identifying the right-sized role for the organizational learning facilitator was a challenge. Because this role often crosses silos within the organization, determining the most effective use of time and resources is an ongoing, push-pull process. As one participant reflected, “How much should they be integrated into different areas — how much, and how close?” What is the right balance?

Clear Roles and Responsibilities to Support Learning for All Staff

Participants consistently identified the importance of well-defined roles and responsibilities for all staff and informal or formal networks for organizational learning. While learning can be facilitated or led by a designated internal champion, all learning does not reside with that individual or a particular department. It is called “organizational” learning because it reaches across the organization in many ways, and needs to be supported and valued by all staff. A few interviewees concurred, with the observation that “learning should be part of everyone’s job”; one pointed out that at their foundation, “it’s called

the Evaluation Department without learning in the title, because the CEO saw learning as everyone’s job.”

A broader culture of learning can be cultivated in part by an effective organizational structure where all staff understand how their work and engagement in the learning process aligns with the organization’s goals. Often, participants discussed cross-silo learning at their organizations as something they were most proud of. One said that their goal is to “share knowledge and forge connection across the teams”; another was “proud they have a learning plan for every body of work.”

Carving out roles and responsibilities for all staff in organizational learning can create many points of tension. Time is a major issue, especially at smaller foundations or those with lean staffing where people are expected to wear multiple hats every day. Integrating learning into existing meetings, and not as an add-on, is often essential, and staff skills and capacity to carry out or engage in effective organizational learning may require capacity building and practice. Finally, tension can emerge when learning — which is about reflection and improvement — meets evaluation — which often is about accountability.

Right-Sized, Iterative, and Purposeful Organizational Structure

While designing and implementing an organizational structure that supports learning across a foundation was identified as a worthwhile pursuit, a core message from the interviews was that the structure must be right-sized, iterative, and purposeful for each foundation’s own organizational mission, culture, and processes.

Many participants advised that when building an organizational structure for learning, foundations should start small and build on existing processes so as not to overburden staff. Inherent in organizational learning is the fact that, if effective, organizations will continually discover new things that will lead to changes and new ways of working. The structure should be viewed from

this lens, too: Try something, learn from it, and build on it the next time. One participant, the internal champion for learning at their organization, reflected that over time the organization came to recognize the end game was not a standardized structure, systems, and processes. The foundation had developed a learning practice without that approach, and it grew apparent that “systems become overbuilt and they collapse on themselves ..., and you spend all the time of the team managing and curating the system instead of actually doing the work.”

One interviewee advised foundations seeking to strengthen their organizational learning practices to remember that “organizations are made up of people, and people change at different paces. For some, the status quo is easier than change.” Another shared a story about how a senior leader and her department were not truly engaging the organizational learning work around equity because they saw it as important only for the program staff, and did not see the relevance of it for their particular positions.

Organizational learning does not just happen. Our interviews revealed that learning requires a staffing structure that intentionally organizes people, communicates their roles, and gives them direction.

Processes and Tools to Facilitate Learning

Processes to facilitate learning need to be in place at each stage to make organizational learning work. These include tools to collect incoming learning, to consolidate it into something useful, and to make it available to the staff on an ongoing basis. Organizations varied greatly in this category, and each participant had a unique tool to describe. However, two overarching approaches emerged from the interviews: learning embedded in existing or new organizational processes, and appropriate tools deployed and used to aid in effective learning. Organizational learning needs to fit the organization’s culture, and there are many processes and tools to facilitate the process. (See Appendix 2.)

Inherent in organizational learning is the fact that, if effective, organizations will continually discover new things that will lead to changes and new ways of working. The structure should be viewed from this lens, too: Try something, learn from it, and build on it the next time.

Learning Embedded in Organizational Processes

Several participants reported that for organizational learning to work effectively, it needs to be embedded in existing or new organizational processes and in the structure and culture of the organization. These processes must match learning that is flexible and structured to staff requirements. Participants noted that reflection and learning must be built into existing processes for participants to see value in it, but that there is often some trial and error required to get it right.

Knowledge management can be complicated. One foundation had grand plans at the beginning of its learning journey to synthesize all its learnings across all sources and departments. But over time, it came to see that its current knowledge management system is good enough. Staff can track down results from previous work and learning conversations; they know enough about knowledge management to find what they need for the next decision. “This system is not perfect or particularly sophisticated, but it gets us 75 percent of the way there with minimal effort and cost,” one interviewee said. Several participants noted that the perfect can be the enemy of the good — that a critical piece of early learning has been to go with what works, even if it’s not flawless.

Learning is one thing; but subsequent knowledge management or the output of learning can be another challenge. Several organizations struggle with how to use everything that has been learned. And staff turnover can cause significant gaps in knowledge — the staff learns, but then leaves or does not share that learning and the mistake is repeated.

Several organizations were going through or had recently experienced staff or leadership transitions. Learning and knowledge management is even more complicated during such periods of change. One interviewee remarked:

There are short attention spans within foundations; this is often related to turnover in staff and board. Often the most valuable evaluations are for long-term initiatives, but when [there is] board and CEO turnover there is often a pretty dramatic shift in priorities — especially around strategy and learning questions.

This means that learning related to an earlier strategy may no longer be viewed as relevant when the foundation changes strategy. Even if the strategy stays the same, turnover in program staff may bring new expectations, or questions may no longer make sense or be relevant.

Appropriate Tools Deployed and Used to Aid in Effective Learning

Participants made many comments about how staff charged with organizational learning were focused on creating something that worked for

their specific organization. Learning is one thing; but subsequent knowledge management or the output of learning can be another challenge. Several organizations struggle with how to use everything that has been learned. And staff turnover can cause significant gaps in knowledge — the staff learns, but then leaves or does not share that learning and the mistake is repeated. Organizational learning cannot work if it is confined to one department. Several participants commented on the need to create a long-term vision and tie learning to the next decision point.

Several interviewees said having the right amount of information in the right form for your audience — in other words, making information usable — is a critical job skill. At one foundation that was working to identify new priorities, the evaluation and learning team led a process to pinpoint 10 areas of focus using staff input, literature, and other data. The team developed attractive, digestible, page-long snapshots, which were worked on by various program staff. At the time, the culture of the program staff was to present 15-page reports with numerous citations. When the strategic learning team returned a one-pager without citations, the program team was shocked. But the format worked perfectly for the board. The evaluation and learning team was trying to create a tool that would be most useful for the decision-making process.

Three participants said that connecting their organizations' learning goals with annual staff evaluations is key. One foundation ties organizational goals and team goals to the annual planning and budget process. It creates cascading goals so that all employees have annual goals that are directly connected to the foundation's goals. "The feedback has been that people now feel more aligned than they did in the past," the interviewee said.

A wide variety of learning tools are being used at the 16 organizations that participated in these interviews. (See Appendix 2.) Interviewees identified processes and tools that included structured learning conversations; daylong retreats; before-action and after-action reviews; and

book groups and brownbag lunch-and-learns. No one tool fits every organization. Several of these organizations participate in the Center for Effective Philanthropy's (CEP) staff survey; one has done so for 10 years and now has long trend lines: "The open-ended questions are anonymous and that is where people pour their heart out," the interviewee said. The entire staff gets the feedback from open-ended categories, the learning team pulls out themes, and the whole organization then spends months working in small groups to break the information down and make foundationwide changes.

Another foundation does an in-depth midpoint evaluation of larger, longer bodies of work, typically bringing in leading experts on an issue from around the county for one-day reviews of the foundation's learnings, evaluation findings, and strategy for that issue area. The foundation has learned much of value from these midpoint check-ins and has made some significant changes to strategy based on results of the one-day meetings. It is also changing how it concludes a body of work, seeking a more journalistic approach to the story of the work and trying to use different perspectives and angles for analysis to inform future work.

One foundation found a reading group to be an effective staff-training tool:

We would read and discuss over lunch. We were focused on books that would make us smarter as grantmakers (e.g., Ta-Nehisi Coates' *Between the World and Me* and Mindy Thompson Fullilove's *Urban Alchemy*), especially in support of health equity [and] our efforts to do our grantmaking through a health equity lens.

Several participants talked about the desire to be better storytellers, recognizing that a good story helps to communicate important organizational learnings. One foundation has had a storytelling group and is publishing stories about its programs and campaigns; the goal is to develop publications based on their stories. "I wish they would have done this sooner," noted

Several participants talked about the desire to be better storytellers, recognizing that a good story helps to communicate important organizational learnings. One foundation has had a storytelling group and is publishing stories about its programs and campaigns; the goal is to develop publications based on their stories.

the participant; it has been effective for the foundation to put a lot of energy into telling its story.

Discussion

Sixteen diverse foundations had candid, honest conversations about organizational learning. Each organization has a unique story, and is moving at its own pace on the learning journey. While experiences, structures, challenges, and successes were diverse, the four distinct categories explored in this article emerged as areas where organizational learning can encounter either significant success or challenge. While the experience of the participants differed, some of these areas were identified as challenges more frequently than others. Many organizations reported struggling with the best way to effect culture change — never an easy task. Several foundations noted some successes with organizing people — their roles, relationships, and responsibilities.

One notable finding was how frequently participants reported that they were in the middle of trying "something new" when it came to learning together as an organization. Several stated that they could not yet report success or failure

We have been fascinated both by philanthropy's willingness to amplify success and by the lack of space and time it devotes to discuss failure — projects and processes that did not yield the desired results. Without that space, philanthropy — a field generally full of small shops of evaluators and researchers — is moving more slowly than it could to develop alternative models and methods.

because they were still evaluating a new process. Another question that came up multiple times was the ability of organizations to continue to learn when undergoing dramatic change, such as leadership transitions or shifts in focus. Some participants questioned whether an organization should focus on learning during such turbulent times.

Interview participants validated the findings from peer-reviewed and grey literature that identify the key characteristics of a successful learning organization, and were willing to share some of their toughest challenges in the process. And the authors learned that success and challenge go hand in hand. Finding stories of failure and challenge in organizational learning is hard to do without also talking about successes, about taking the next step toward solutions to strengthening organizational learning. So many of the failures shared by participants were noted as important pivot points or learning opportunities — there was much optimism among most participants about progress their foundations were making toward becoming a better learning organization.

Limitations

The size of the foundations participating in our study varied and, while peers of the authors, the evaluation or learning staff who were interviewed represented diverse levels of experience. On this point, it is worth noting that only 34 percent of the more than 100 participants in the 2016 *Benchmarking Foundation Evaluation Practices* survey had a dedicated evaluation unit, and that those units are more common at larger foundations (CEP & Center for Evaluation Innovation, 2016).

Our study contains several strengths and weaknesses. The authors were using a standard definition of organizational learning, but interviewees were not provided with an explicit definition. This proved to be problematic when it was time to code the responses; each participant seemed to be working from a slightly different definition.

Our initial focus was on learning from failure, but we ultimately learned a great deal about organizational learning — particularly some general findings about successes and failures. We have been fascinated both by philanthropy's willingness to amplify success and by the lack of space and time it devotes to discuss failure — projects and processes that did not yield the desired results. Without that space, philanthropy — a field generally full of small shops of evaluators and researchers — is moving more slowly than it could to develop alternative models and methods.

It is worth noting that we chose participants with whom we already had personal relationships, believing this allowed for richer discussion of the challenges and failures involved in learning at each organization. We recognize, however, that the sample is in no way representative of the philanthropic field.

Conclusion

No single learning method works for every organization; each foundation must do what is right for itself at the time and within its current culture. Often, fancy data systems are not required: instead, look to executive leadership

and resources for learning, a strong culture of learning across the organization, staff roles and relationships to support learning, and processes and tools to help facilitate it.

The participants in this study represented foundations of a variety of sizes, expertise, focus areas, and geography. None, however, reported mastery of organizational learning — which, in itself, is likely a significant finding. It may be true that authentic organizational learning will, by definition, be ever-changing. But, as such, we believe it is valuable to understand how other foundations have faced similar challenges.

As one participant remarked, these may not be things “you would say from the podium of GEO, but what you would say in the hallway to help your colleagues avoid the pitfalls.” We are hungry for a space to learn and share learnings so that we can help colleagues avoid the pitfalls and avoid them ourselves. We hope this article leads to more conversations about how to make that happen.

References

- CENTER FOR EFFECTIVE PHILANTHROPY & CENTER FOR EVALUATION INNOVATION. (2016). *Benchmarking foundation evaluation practices*. Cambridge, MA: Author. Available online at <http://research.cep.org/benchmarking-foundation-evaluation-practices>
- COFFMAN, J., & BEER, T. (2011). *Evaluation to support strategic learning: Principles and practices*. Washington, DC: Center for Evaluation Innovation. Retrieved from http://www.pointk.org/resources/files/strategic_learning_coffman_beer.pdf
- DARLING, M. J., & SMITH, J. S. (2011). Lessons (not yet) learned. *The Foundation Review*, 3(1), 97–109. <https://doi.org/10.4087/FOUNDATIONREVIEW-D-10-00037>
- DAVID, T., & ENRIGHT, K. (2015). *The source codes of foundation culture*. Washington, DC: Grantmakers for Effective Organizations. Retrieved from <https://www.geofunders.org/resources/the-source-codes-of-foundation-culture-683>
- EASTERLING, D., & CSUTI, N. B. (1999). *Using evaluation to improve grantmaking: What's good for the goose is good for the grantor*. Denver: The Colorado Trust. Retrieved from <https://www.socialgrantmakers.org/sites/default/files/resources/EvaltoImprove1999.pdf>
- GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS & COUNCIL ON FOUNDATIONS. (2009). *Evaluation in philanthropy: Perspectives from the field*. Washington, DC: Author. Retrieved from <https://www.geofunders.org/resources/evaluation-in-philanthropy-perspectives-from-the-field-689>
- GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS. (2016). *What does it take to learn together well?* Washington, DC: Author. Retrieved from <https://www.geofunders.org/resources/what-does-it-take-to-learn-together-well-890>
- GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS. (2014a). *The smarter grantmaking playbook: How can we embrace a learning for improvement mindset?* Washington, DC: Author. Available online at <https://www.geofunders.org/resources/658>
- GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS. (2014b). *The smarter grantmaking playbook: What is a learning organization?* Washington, DC: Author. Retrieved from <https://www.geofunders.org/resources/what-is-a-learning-organization-674>
- GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS. (2007). *Learning for results: GEO action guide*. Washington, DC: Author. Available online at <https://www.geofunders.org/resources/1151>
- GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS. (n.d.). *The smarter grantmaking playbook*. Washington, DC: Author. Retrieved from <https://www.geofunders.org/what-we-offer/the-smarter-grantmaking-playbook>

GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS. (2017, July 10.) The Learning Conference 2017 Recap. The Learning Conference. Chicago, IL. May 31 – June 1, 2017. Retrieved from <http://www.alphawoodfoundation.org/newsroom/geo2017>

GUPTA, A., & MCDANIEL, J. (2002). Creating competitive advantage by effectively managing knowledge: A framework for knowledge management. *Journal of Knowledge Management Practice*, 3(2), 40–49.

HAMILTON, R., BROWN, P., CHASKIN, R., FIESTER, L., RICHMAN, H., SOJOURNER, A., & WEBER, J. (2005). *Learning for community change: Core components of foundations that learn*. Chicago, IL: University of Chicago Chapin Hall Center for Children. Retrieved from <http://racialequitytools.org/resourcefiles/hamilton.pdf>

KENNEDY LEAHY, S., WEGMANN, S., & NOLEN, L. (2016). Through the looking glass: Foundation evaluation and learning and the quest for strategic learning. *The Foundation Review*, 8(5), 23–37. <https://doi.org/10.9707/1944-5660.1339>

MILWAY, K. S., & SAXTON, A. (2011). The challenge of organizational learning. *Stanford Social Innovation Review*, 9(3), 44–49.

PUTNAM, K. (2004). *Measuring foundation performance: Examples from the field*. Oakland: California Healthcare Foundation. Retrieved from <https://www.chcf.org/wp-content/uploads/2017/12/PDF-MeasuringFoundationPerformance.pdf>

Jennifer Chubinski, Ph.D., is vice president for research and evaluation at Interact for Health. Correspondence concerning this article should be addressed to Jennifer Chubinski, Interact for Health, 3805 Edwards Road, Suite 500, Cincinnati, OH 45209 (email: jchubinski@interactforhealth.org).

Kelley Adcock, M.P.H., is an evaluation and research officer at Interact for Health.

Susan Sprigg, M.P.H., is a research officer at Interact for Health.

APPENDIX 1 Interview Questions**Demographics and Background**

1. What are the focus areas of your foundation?
2. How big are the financial assets at your foundation?
3. How many staff work at your foundation? How many of those staff work specifically on evaluation, learning, or research activities as part of their core job?
4. What is the approximate size of your evaluation, learning, and/or research budget?
5. What is your role at the foundation? What are some of your key responsibilities? How long have you been in your role?

Organizational Learning

6. Describe what organizational learning looks like for your organization.
7. How long has your foundation engaged in organizational learning activities?
8. When you think about organizational learning within your foundation, what are you most proud of? What have been the biggest benefits of organizational learning to your foundation?
9. We are talking today because while there has been great momentum to carry out organizational learning strategies within foundations and share successes, we do not often stop to reflect on failures and lessons learned in the process of building the capacity for organizational learning. We also recognize that sometimes, organizational learning “fails” or doesn’t go as planned because of things outside of your and others’ control. With that in mind:
 - When you think about your foundation’s organizational learning, if you could do something over again, what would you do differently and why?
 - Describe a specific time when something did not go as planned. What happened? Why do you think it happened?
10. Think about how you would design and implement the perfect organizational learning structure at your organization. What would you anticipate the biggest facilitators and barriers would be to making your perfect organizational learning structure happen?
11. If you could give advice to other foundations to strengthen their organizational learning practices based on the challenges and “failures” you have experienced, what would you tell them?

Wrap-Up

12. What other foundations should we talk to for this project? (Get contact information.)
13. We may include a list of foundations that contributed to the article. Would you like to be listed or would you prefer to remain anonymous?

APPENDIX 2 Learning Tools and Resources Suggested by Participants

1. Many resources provided by GEO were mentioned by many of the participants, including:
 - GEO's work around culture and learning (see, e.g., GEO, 2016, 2014a, 2014b, 2007),
 - GEO's annual conference, and
 - a list of case studies from funders having success with learning, available at <https://www.geofunders.org/resources?topics=Learning+and+Evaluation&events=Member+Story&date=#>
2. Several organizations reported using the Center for Effective Philanthropy's staff satisfaction survey to track staff engagement anonymously; one foundation had its own staff culture survey.
3. Several foundations reported offering lunch-and-learns, brown-bags, or book clubs.
4. A number of participants identified the Evaluation Roundtable as a good resource. (See <http://www.evaluationroundtable.org/publications.html>.)
5. Numerous trainings or methods were reported by participants as helpful to their individual or team development:
 - Before-action reviews and after-action reviews (see <https://hbr.org/2005/07/learning-in-the-thick-of-it>)
 - The Fourth Quadrant training on emergent learning (see <http://www.4qpartners.com/certification-program.html>)
 - Situational Leadership training (see <https://com-peds-pulmonary.sites.medinfo.ufl.edu/files/2014/01/Hanke-Situational-Leadership.pdf>)
 - Annie E. Casey Foundation's Results Count leadership development program (see <https://www.aecf.org/work/leadership-development/results-count/>)
 - FSG's ecocycle mapping approach (see <https://www.fsg.org/blog/new-systems-thinking-tool-ecocycle-mapping>)

Study Participants

1. Christine Baker Mitton, director of knowledge and learning, Sisters of Charity Foundation of Cleveland, Ohio
2. Nancy Csuti, vice president of research, evaluation, and strategic learning, The Colorado Trust
3. Kathleen Lis Dean, senior director of evaluation, outcomes, and learning, St. Luke's Foundation
4. Kristy Klein-Davis, vice president of strategy and learning; Sarah Smith, learning officer; and Megan Klenke-Isgiggs, learning officer, Missouri Foundation for Health
5. Jill Miller, president, and Jennifer Zimmerman, director of grants and evaluation, bi3
6. Kelci Price, senior director of learning and evaluation, Colorado Health Foundation
7. Barbara Schillo, vice president, ClearWay Minnesota
8. Allen Smart, independent philanthropic and rural strategist and former vice president of programming for two southern U.S. foundations
9. Sandra Wegmann, learning officer, Episcopal Health Foundation
10. Matthew Carr, director of evaluation, Ewing Marion Kauffman Foundation
11. Geoff Zimmerman, senior director of impact and improvement, Knowledge Works Foundation
12. Doug Easterling, professor, Wake Forest University School of Medicine
13. Former leader of a small health foundation in the Southeast
14. Learning officer for a large international family foundation
15. Vice president of programs for a small, city-focused health foundation on the West Coast
16. Vice president of programs for a small, city-focused health foundation on the East Coast