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## Executive Summaries

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# Executive Summaries

## Tools

7

### Strategic Learning in Practice: A Case Study of the Kauffman Foundation

*Matthew Carr, Ph.D., Brett Hembree, M.P.A., and Nathan Madden, Ph.D., Ewing Marion Kauffman Foundation*

Increasingly, foundations and nonprofits are seeking to engage their staff in learning and reflection activities that assess successes and challenges, and then generate insights that can improve their strategies. This case study describes how the Ewing Marion Kauffman Foundation cultivated a staff cohort “learning champions,” created simple tools and processes that can more easily capture lessons generated internally and externally, and provided training in facilitation techniques to ensure insights are connecting back into strategies to drive decision-making.

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22

### Building a Culture of Learning: Teaching a Complex Organization How to Fish

*Tiffany Clarke, M.P.P., M.P.H., Hallie Preskill, Ph.D., and Abigail Stevenson, M.B.A., M.P.H., FSG; and Pamela Schwartz, M.P.H., Kaiser Permanente*

Many social sector organizations are balancing their strategic plans with an ability to respond more quickly to change as it unfolds in their communities. To increase its capacity for strategic learning, Kaiser Permanente Community Health developed and implemented a system called Measurement and Evaluation for Learning and Outcomes. While this was a tailored process, its underlying thinking, approach, and lessons learned can be informative to others who are thinking about how to position their organizations and communities to thrive in times of change.

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35

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

*Jan Jaffe, M.B.A., Philanthropy Northwest*

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.

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# Executive Summaries (continued)

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49

## Knowledge Translation to Enhance Evaluation Use: A Case Example

*Alison Rogers, M.P.H., M.Eval., and Catherine Malla, M.I.P.H., The Fred Hollows Foundation*

This article addresses how essential information about monitoring, evaluation, and lessons learned can be made available to foundations. The Fred Hollows Foundation identified a gap in this area through an evaluation capacity-building readiness assessment, and introduced the concept of participatory, real-time monitoring, evaluation, and learning bulletins grounded in the principles of knowledge translation. This article describes how those bulletins were developed and used within the foundation to ensure access to relevant and timely information, and examines how they provided a mechanism to promote internal reflection and shift attitudes around data, which supported the development of a culture of evaluation. This approach will be useful for foundations that have limited resources.

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## Sector

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62

## 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*

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. Based on interviews with learning, evaluation, and research officers 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.

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## Reflective Practice

81

### Shifting Mindsets: How Meaningful Accountability Systems Can Strengthen Foundation Learning and Improve Impact

*Marc J. Holley, Ph.D., and Marcie Parkhurst, M.C.P., Walton Family Foundation*

This article explores what it looks like when a foundation attempts to integrate accountability and learning practices, and presents a framework for the unique and complementary contributions that accountability and learning can make to the work of foundations. The article also looks at the tensions that can arise when a foundation's internal evaluation staff attempt to design, implement, and make use of accountability systems. It identifies three problematic perspectives that can hold foundations back from full engagement in internally driven accountability initiatives, and offers practical guidance on how to shift these mindsets to more productive practices.

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95

### Evaluators as Conduits and Supports for Foundation Learning

*Clare Nolan, M.P.P., Engage R+D; Meg Long, M.P.A., Equal Measure; and Debra Joy Pérez, Ph.D., Simmons University*

Evaluators play a critical role in supporting philanthropic learning, programming, and strategy, but evaluation and learning in philanthropy is often limited in ways that impede deeper resonance and impact. Most philanthropic evaluation is focused on the needs of individual foundations; knowledge sharing with the broader field is limited; and foundations struggle to integrate evaluation and learning as a management tool. This article makes the case that evaluators and funders can do more to build the collective capacity of evaluators working in philanthropy in order to enhance their contributions to community change. This article also examines the ways that evaluation in philanthropy is evolving, lays out root causes of its limitations, and looks at emerging tools, techniques, and lessons that showcase new ways evaluators and funders are working together to strengthen practice.

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107

### Building Principle-Based Strategic Learning: Insights From Practice

*Kelci M. Price, Ph.D., Colorado Health Foundation; Chera Reid, Ph.D., Kresge Foundation; and Suzanne Kennedy Leahy, Ph.D., Episcopal Health Foundation*

Given that many foundations are engaged in strategic philanthropy, where they have specific conditions in the world they are trying to change, it is critical that they have the capacity to effectively learn about and improve their strategies. This article offers three principles for strategic learning, informed by the field and insights from practice across three foundations. Each principle is explored in terms of what it means and why it is important, along with examples from how it could look in practice. By taking a principle-focused approach to strategic learning, this article offers a base from which to build a rigorous practice of strategic learning in any organization and to tailor the specifics of that practice to the organization's unique context and culture.

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