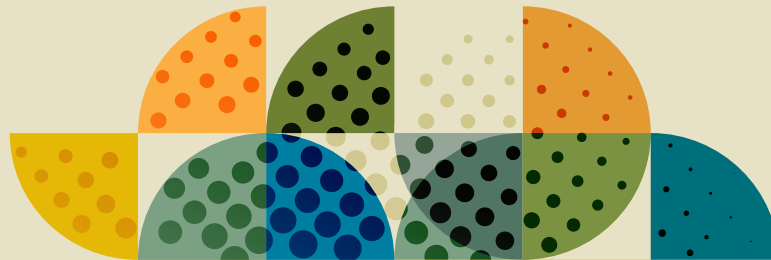


# LEARNING TOGETHER

Actionable Approaches for Grantmakers

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GEO is a diverse community of more than 500 grantmakers working to reshape the way philanthropy operates. We are committed to advancing smarter grantmaking practices that enable nonprofits to grow stronger and more effective at achieving better results.

The GEO community provides grantmakers with the resources and connections to build knowledge and improve practice in areas that have proven most critical to nonprofit success. We help grantmakers strengthen relationships with grantees, support nonprofit resilience, use learning for improvement and collaborate for greater impact.

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## 2015

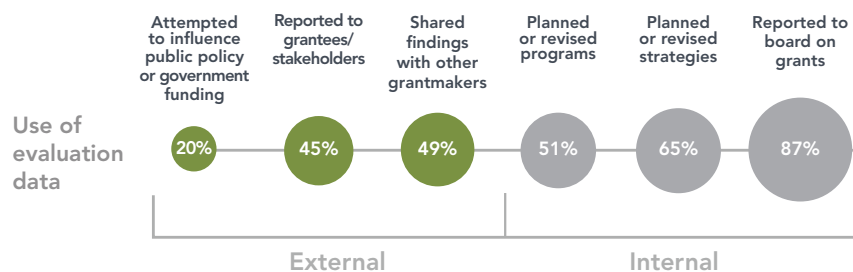
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# INTRODUCTION

Today, more and more grantmakers are embracing evaluation and learning as stepping-stones to better results. In GEO's 2014 survey of philanthropic practice, three out of four grantmakers (76 percent) said they evaluate their work.

Dig a little deeper into the data, however, and it is clear that grantmakers still view evaluation as something they do *internally*. They evaluate so staff can monitor what is happening with a specific program or grant or so they can report to the board on how things are going.

*Funders that do evaluate their work are focused on internal uses.*



A majority of grantmakers are struggling to make evaluation and learning meaningful to anyone outside their organizations. Not only is evaluation conducted primarily for internal purposes, but it is usually done by the grantmaker *entirely on its own* — with no outside learning partners except perhaps an external evaluator — and provides little value and may even be burdensome to the grantee. It may be that some funders do not consider expanding the scope of learning efforts beyond their own walls. Or perhaps the gap is driven by funding constraints or funder–grantee dynamics. In any case, grantees and other stakeholders are critical partners in the achievement of grantmakers' missions and are therefore critical learning partners as well.

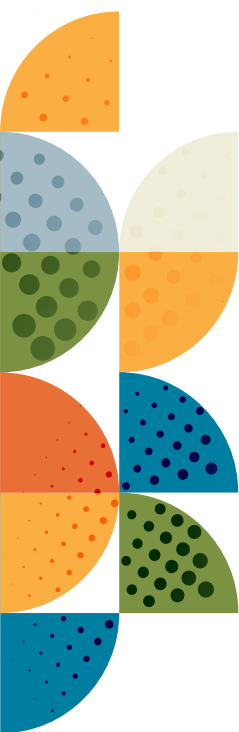
Adding to the problem, grantmakers are not providing grantees with the resources they need to evaluate and learn from their work. In a 2012 survey by Innovation Network, 61 percent of nonprofits said that insufficient financial resources were a significant challenge in carrying out evaluation.<sup>1</sup> A separate survey by the Nonprofit Finance Fund found that 69 percent of nonprofits reported that their funders rarely or never cover the costs of impact measurement.<sup>2</sup> This finding was echoed by Center for Effective Philanthropy, which found that 64 percent of nonprofits do not tend to receive financial and/or non-monetary support for performance assessment.<sup>3</sup>

Grantmakers and the nonprofit organizations we support are working on tough, systemic issues from improving educational opportunities for kids to turning around struggling neighborhoods to achieving better health outcomes for at-risk people and communities. Adding to the challenge, this work is happening at a time when public policies, technologies and economic conditions are in a state of constant change. Solutions that funders think will work today may not even be relevant tomorrow.

1. Innovation Network, "State of Evaluation," 2012 (535 nonprofit organizations surveyed). Available at [http://www.innonet.org/client\\_docs/innonet-state-of-evaluation-2012.pdf](http://www.innonet.org/client_docs/innonet-state-of-evaluation-2012.pdf).

2. Nonprofit Finance Fund, "State of the Sector Survey," 2015 (5,451 nonprofit respondents). Available at <http://nonprofitfinancefund.org/state-of-the-sector-surveys>.

3. Ellie Buteau, Ramya Gopal and Jennifer Glickman, "Assessing to Achieve High Performance: What Nonprofits are Doing and How Foundations Can Help," 2015 (183 nonprofit respondents). Available at <http://www.effectivephilanthropy.org/wp-content/uploads/2015/04/Assessing-to-Achieve-High-Performance.pdf>.



To make lasting progress on the issues we care about, we have to be learning with others all the time. We have to know what is happening in the communities where we want to have an impact. We have to know how change is affecting the ability of our grantees to do their work and reach their goals. We have to know what others are learning — including other funders, nonprofits, government and business partners, and researchers — about what works to get to the results we want. We cannot know any of this if we are learning on our own and if we are not supporting our grantees' and partners' learning.

Learning together helps grantmakers ensure that our programs and grants are founded on a genuine, real-world understanding of the problems we want to solve through our grantmaking, as well as the best possible solutions. Learning with others also makes it easier to ensure that information and analysis drive improvement. With more people, more organizations and more sectors at the table, the lessons from a learning activity can be applied more quickly and in more places to improve outcomes on the ground.

Grantmakers' learning partners can include grantees, fellow funders, community members, community leaders, government and private-sector entities, and others invested in solving the same problems.<sup>4</sup> Learning partners can vary depending on what we want to learn together and why. Through shared learning activities — for example, collectively and collaboratively designing learning agendas, identifying learning goals, and making meaning of data and information — grantmakers can improve our own performance and impact as well as the performance and impact of partners.

When we stay in our offices and boardrooms and try to learn in isolation, we miss out on crucial information and perspectives of others, including the expertise of those closest to the issues. And when we hold onto the knowledge we gain through our learning activities instead of sharing it with the outside world, we deprive grantees, fellow grantmakers, community members and other partners of information that could be useful as everyone works to get better results on the issues we *all* care about.

In this publication, GEO offers actionable ideas and practices to help grantmakers make learning with others a priority. The publication includes stories about foundations that are learning together with a variety of partners, plus a discussion of the key questions that can help shape successful shared learning. It is based on research and interviews conducted from late 2013 to 2015, including extensive outreach to grantmakers, evaluation practitioners and others. The focus of GEO's inquiry: documenting the challenges facing grantmakers as they set out to learn with others, lifting up what it takes to do this work successfully and identifying grantmakers that show a commitment to learning together.

## Learning Together Defined

The GEO community has long embraced the idea that learning and evaluation in philanthropy are about more than just ensuring that grantees are doing what they promise or that a specific program area at a foundation is meeting its goals. In *Evaluation in Philanthropy*, GEO and the Council on Foundations stated that learning is “about improvement, not just proof.” In other words, it is about advancing our knowledge and understanding of what works and what does not and of how to improve performance over time. It is about shifting our perspective away from using evaluation to make final judgments and toward using it to identify ways to work better and smarter.

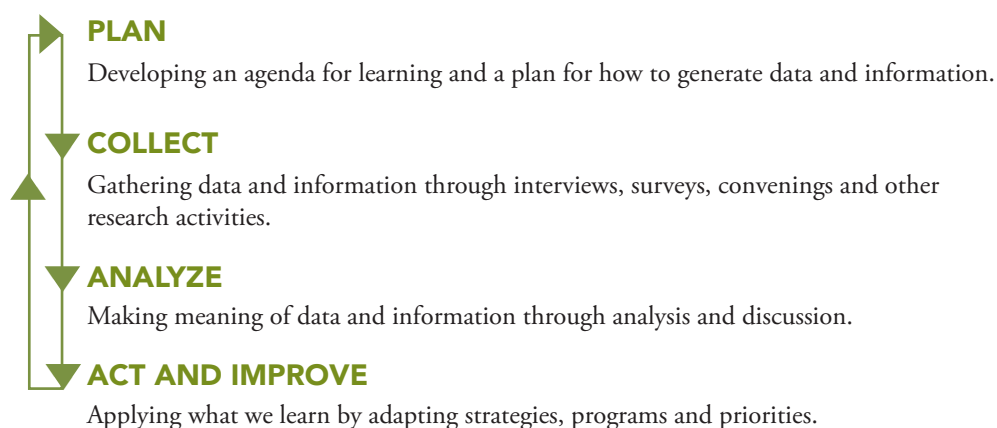
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4. For more information about identifying and engaging stakeholders, please see *The Smarter Grantmaking Playbook*. Available at <http://www.geofunders.org/smarter-grantmaking/strengthen-relationships-with-grantees>.

This view aligns with the definition of *strategic learning* advanced by the Center for Evaluation Innovation: Strategic learning occurs when organizations or groups use evaluation and evaluative thinking to learn in real time and adapt their strategies to the changing circumstances around them. Strategic learning makes evaluation a part of a strategy’s development and implementation — embedding it so that it influences the process.<sup>5</sup>

*Learning together* simply expands this definition to include activities grantmakers can embrace in order to learn and evaluate in cooperation with partners, such as grantees, other funders, community members, government agencies and so forth. GEO also uses other terms throughout this publication to refer to the same universe of activities. Those other terms include *shared learning*, *collective learning* and *learning with others*.

Learning together means collaborating with partners across any (and preferably all) of the stages of the learning cycle identified by Innovation Network:<sup>6</sup>



When grantmakers learn with a variety of other partners, we get better data and information — and better results. *Planning together* with partners, for example, can help ensure that we are asking smarter questions and designing more effective learning activities. Similarly, *collecting together* can produce crosscutting data and information from stakeholders who are working at different levels and who offer varying perspectives on an issue. Next, *analyzing together* ensures that grantmakers are tapping outside expertise and insights to make meaning of what we are learning. And, *acting and improving together* means bringing grantees and other partners into the room to help design or change strategies and programs based on what we learn.

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

*Joe Dickman, deputy director for research, evaluation and learning, the MasterCard Foundation*

5. Julia Coffman and Tanya Beer, “Evaluation to Support Strategic Learning: Principles and Practices,” Center for Evaluation Innovation, 2011. Available at <http://bit.ly/KmgM2t>.

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



# BUILDING LEARNING IN THE FIELD

GEO has worked to help grantmakers adopt smarter learning practices for many years through conferences, publications, learning communities and peer learning programs:

- In the publication *Evaluation in Philanthropy*, GEO and the Council on Foundations framed the shifts grantmakers need to make in order to successfully use evaluation for learning, including learning with others and learning across initiatives.
- GEO created another publication, *Four Essentials for Evaluation*, to offer grantmakers practical guidance in establishing the basic organizational pillars that support evaluation — leadership, planning, organizing and sharing.
- Starting in 2004, GEO has convened grantmakers on a regular basis for conferences focused on evaluation and learning in philanthropy. The Learning Conference 2015, held in Boston, focused on supporting grantmakers to learn in partnership with others.
- GEO's *Smarter Grantmaking Playbook*, launched in 2014, is an online resource providing grantmakers with guidance and models for advancing their work when it comes to learning, collaboration and other priorities.

Of course, many in the social sector have been working to support funders and nonprofits as they strive to adopt effective approaches to learning and evaluation. Here is just a sampling:

- The **Bruner Foundation** has done pioneering work in supporting the evaluation capacity of nonprofits and their community partners, and in advancing the use of evaluative thinking in the sector.
- The **Center for Evaluation Innovation** works to “push philanthropic and nonprofit evaluation practice in new directions” through a range of activities. These include hosting the **Evaluation Roundtable**, a network of foundation leaders responsible for evaluation who are working to advance fieldwide practice.
- **FSG** supports evaluating complex initiatives and evaluation of collective impact initiatives, in addition to developmental evaluation and strategic reviews.
- **Innovation Network** and **Equal Measure** are building the capacity of nonprofits and foundations to evaluate their work and learn with others.
- The **Performance Imperative Campaign**, developed collaboratively by the Leap of Reason Ambassadors Community, is helping the sector define what high performance is for nonprofits — and what organizational disciplines are most clearly linked to high performance.

GEO acknowledges and honors the work of these and other organizations that are supporting grantmakers and their partners to learn more effectively. Through this publication, we build on their work — and ours too — to take a deeper dive into what it takes to learn together with grantees, community members, other funders and additional partners.



# GRANTMAKER ROLES IN LEARNING TOGETHER

Grantmakers can play a number of roles in shared learning activities, and those roles can overlap as the work unfolds. Possible grantmaker roles include the following:

**Convener:** organizing meetings and events where learning together happens.

**Facilitator:** determining how collective learning activities are resourced and run.

**Capacity builder:** providing funds and other support to boost the abilities of the grantee and partners to collect, analyze and share information.

**Participant:** bringing questions and interests to the table during learning activities.

**Funder:** providing funds and nonmonetary support for shared learning activities carried out by grantees and partners.



## THREE BIG QUESTIONS

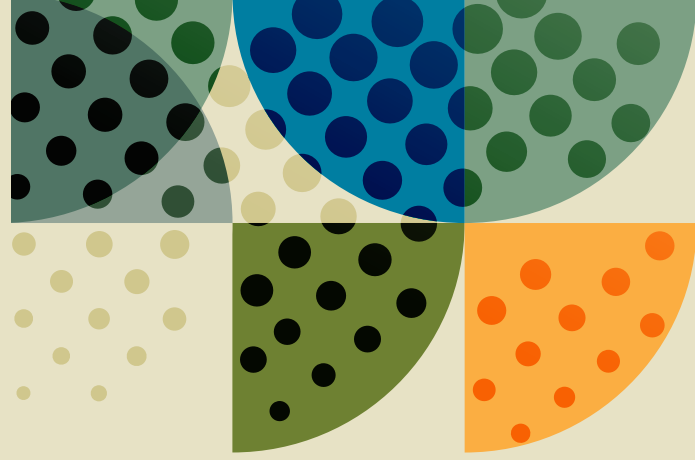
In late 2013 and early 2014, GEO set out to build on its prior work on the issue of learning in philanthropy by conducting a literature review and interviews with more than 30 grantmakers and evaluation practitioners to assess current practices and priorities. During the interviews, it became clear that many grantmakers were having difficulty shifting evaluation and learning from a purely internal function to an activity they can and should be doing with others.

GEO subsequently engaged in further outreach to identify grantmakers that are demonstrating a commitment to learning together. To inform this report, GEO spoke with nearly two dozen representatives of grantmakers engaged in such work. The goal of these interviews was to document successes and challenges, as well as *what it takes* to learn together effectively with grantees and other partners.

The research revealed that learning together can take many forms: Some grantmakers are convening grantees and community partners to review data about the issues they are working on and are using that data to develop and improve strategies. Others are recasting the grantmaker–grantee relationship so it is based less on learning for compliance and more on learning for improvement. Others are organizing convenings and building formal structures to facilitate the regular exchange of information between grantmakers, grantees and other partners in real time. And still others are working with partners to build an active learning component into the design of collaborative initiatives and programs.

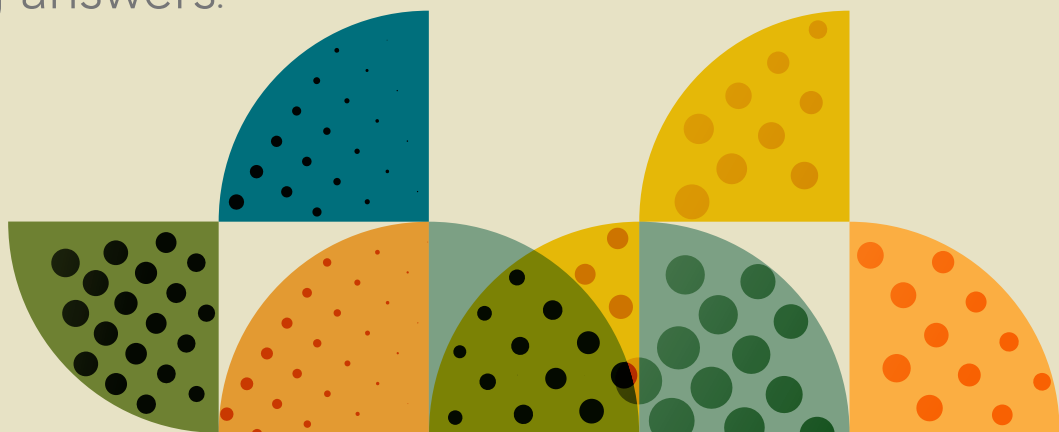
In these conversations, GEO found that grantmakers doing this work generally are guided by three questions that help them structure effective opportunities for learning together — and then using what is learned with their partners to get better results.





- 1 WHAT do we want to learn together — and WHY?
- 2 What are the core VALUES and PRINCIPLES we should keep in mind to ensure the success of shared learning?
- 3 What are the KEY STEPS to making shared learning work?

This publication explores these questions in the following pages and introduces examples of grantmakers that are hard at work finding answers.



# QUESTION 1: WHAT do we want to learn together — and WHY?

As GEO noted earlier, grantmakers and our partners (grantees, community representatives, other funders, government entities, etc.) should view learning as a key to getting better results. Perhaps we want to learn more about an issue so we can develop smarter solutions. Or maybe we want to identify what works to address a problem that we and our partners are trying to solve. Whatever the case, the focus should be on *learning with a purpose* — or asking and answering the questions that will help us and our partners have more impact.

GEO's research suggests that grantmakers that are successfully engaging partners in shared learning are deliberate about their intentions and learning goals from the start. Establishing shared goals, in fact, can be a crucial first step in nurturing a learning partnership with grantees and others. Instead of grantmakers answering the *what* and the *why* questions on their own, many are engaging partners in up-front conversations and dialogue about the intended purpose of a learning effort so there is shared buy-in from the start.

One way to answer the *what* and *why* questions about shared learning is to identify and define some of the hypotheses we want to test. Is our after-school initiative achieving its goal of improving student achievement? To what extent is the lack of quality child care in our community preventing parents from finding stable, family-supporting jobs?

Alternatively, we and our partners may embark on a collective learning activity without a working hypothesis but with a shared interest in learning more about a specific issue or problem and what can be done about it. For example, what major health challenges do African American residents in our community face, and how can health care providers and others respond? Or what are the key pollutants in the river that runs through town, and what can be done to clean it up?

Based on conversations with grantmakers and their partners, GEO identified four primary objectives for shared learning activities.

## 1 Analyzing and building shared knowledge of an issue


Some of the grantmakers GEO spoke with were engaged in shared learning because they want to work with partners to build a better collective understanding of a specific issue. These grantmakers and their partners set out to learn together about a problem or challenge they want to address through their work. The idea is to get on the same page about the issues at the heart of the work they are doing together and to use that shared understanding to help shape better solutions.

The **Skillman Foundation** uses “data walks” in grantee and community meetings to nurture a shared understanding of what is happening in the six neighborhoods that are the focus of the grantmaker’s Good Neighborhoods program. During the data walk discussions, participants

engage with key data from the neighborhoods on issues from crime to participation in after-school programs. The groups assembled use the data walks to weigh what is working to support children on a path to high school graduation as well as what needs to happen to improve student outcomes. See page 20.


## 2 Developing a new plan or initiative

Some grantmakers embrace learning together as a way to enlist people and organizations outside the foundation to help shape a new plan or initiative. Instead of conceiving and designing a program or grantmaking strategy behind closed doors, such grantmakers actively seek input from others and bring people together to brainstorm the best ideas and test possible approaches. The goal is to design and implement a grant, program or shared activity that reflects a genuine understanding of what is happening on the ground and how a range of stakeholders believe we can have lasting impact.

 **Grand Rapids Community Foundation** and the local school district worked together to design an early scholarship initiative aimed at supporting first-generation college students from low-income families to complete a college degree or postsecondary vocational credential. The design of the initiative is based on a collaborative effort to learn what it takes to build a college-going culture in local schools and how best to support students to stay on track to college and careers. The foundation and the district also co-designed a developmental evaluation of the initiative in partnership with national consultants to help guide the work. See page 32.

## 3 Assessing current activities to identify course corrections

Many grantmakers GEO talked with are committed to learning from ongoing work as it progresses rather than waiting for a formal, after-the-fact evaluation report. These grantmakers use collective learning activities to assess how a specific program or initiative is faring in order to make decisions in real time about how to get better results. By gathering ongoing feedback and guidance from people and organizations that are affected by a program or initiative, grantmakers are better positioned to understand its true impact as well as needed changes. Among the real-time approaches to learning together that grantmakers are using are developmental evaluation<sup>7</sup> as well as building regular learning touchpoints and feedback loops into their work with grantees and communities.

 Shared learning has been a critical element of the work of the Weinland Park Collaborative, a neighborhood revitalization effort including **the Columbus Foundation** and a range of public and private funders and grantees. Recently, the Columbus Foundation initiated a research effort with its partners aimed at assessing the impact of the collaborative's housing investments in the neighborhood. "A primary reason for completing the research was to learn with grantees and discover the strengths, weaknesses and opportunities of the housing investments made by the collaborative," said Lisa Courtice, executive vice president of the foundation. When the research showed that gentrification was a growing threat to affordable housing in the community, the foundation held one-on-one and group meetings with partners to start identifying strategies to address the issue in the collaborative's ongoing work.

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7. For a glossary of evaluation terms, please see the GEO publication *Four Essentials for Evaluation* (Washington, D.C.: GEO, 2012). Available at <http://www.geofunders.org/resource-library/all/record/a066000000A3bFMAAZ>.

## 4 Understanding outcomes from completed projects

In addition to using shared learning to evaluate current activities, many grantmakers engage grantees, community members and other partners to assess the outcomes of completed projects or grants and to inform strategy going forward. The idea is to bring stakeholders together to explore the degree to which a specific initiative or activity lived up to its goals and people's hopes and dreams for it. In addition to identifying successes and failures, grantmakers and their partners set out to draw lessons to apply to their ongoing (or future) work together. The questions guiding these dialogues: Where did we succeed or fail, and why? And what does this tell us about how to achieve better outcomes in the future?

The **Lancaster County Community Foundation** formed a grantee cohort to assess the impact of a funding initiative called the Nonprofit Sustainability Matching Fund. The group met several times over the span of a year to exchange experiences and ideas, with the cohort meetings replacing written grantee reports. Based on the success of this experience, the foundation is incorporating grantee cohorts into other ongoing initiatives and programs. "In addition to building partnerships among grantees, this turned into a great opportunity for us to hear firsthand, with multiple partners at the table, how this new funding opportunity was or wasn't working," said Melody Keim, vice president of programs and initiatives with the Pennsylvania grantmaker.

Often, of course, grantmakers' shared learning activities can serve multiple purposes. For example, we and our partners may want to analyze issues at the same time that we are developing a new plan or initiative. Similarly, we may want to assess a completed project in the context of developing a new or different program. Whatever the case, it is critical to enter the process with a clear — and shared — understanding of why we and our partners are embarking on the learning journey in the first place.

# Question 2:

## What are the core VALUES and PRINCIPLES we should keep in mind to ensure the success of shared learning?

Successful learning for grantmakers requires multiple shifts in thinking. The shift from *learning for compliance* to *learning for improvement* is crucial as grantmakers set out to use evaluation to gauge what is and what is not working and to use that information to help grantees ultimately obtain better results. Learning together with partners requires a range of other mental shifts. Based on research and interviews for this publication, GEO identified four key values and principles that contribute to the success of shared learning activities. To the extent that grantmakers embrace these principles from the start and put them into practice in the design and implementation of shared learning, we will have a significantly better chance of reaching our learning goals.

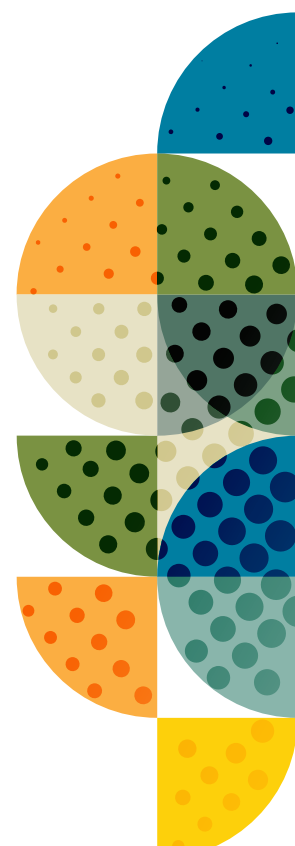
### 1 Shared control

Traditionally, grantmakers have initiated many evaluation and learning activities to seek answers to top-of-mind questions facing their staff or trustees. “To what extent is our anti-childhood obesity program resulting in healthier kids?” “How is Grantee X doing in relation to the impact goals it outlined in its proposal?” Learning together with other partners, however, means *deciding together* about the guiding questions and design of a learning agenda. It also means sharing control of the process and removing unnecessary firewalls surrounding evaluations and evaluators as the grantmaker and its partners collectively make meaning of what they are learning.

**The MasterCard Foundation** jointly develops grant evaluations with implementing partners starting with the question “What do we want to learn together?” The foundation will often steer evaluation toward questions that partners want to test. Among the guiding criteria for the foundation’s research, evaluation and learning activities is the following: “Active engagement of program partners, participants and stakeholders in dynamic ways builds ownership, shared learning and collective action.”

### 2 Openness and flexibility

Any effective partnership requires flexibility and openness — partners need to understand the importance of give-and-take when it comes to making decisions and negotiating roles and responsibilities. For grantmakers in shared learning partnerships, the give-and-take happens as partners focus collectively on the questions they want answered, as well as their interpretations of data and information. Everyone will not have the exact same learning goals, nor will everyone agree on all the takeaways from a learning activity. The best posture for grantmakers is to start the process with an openness to others’ views and needs, as well as a commitment to flexibility in timing and design. This will help ensure that shared learning takes into account the views and experiences of grantees and other partners and that it delivers information and insights that are useful and applicable for everyone involved.



**Living Cities** is a collaborative of foundations working “to develop and scale new approaches to dramatically improve the economic well-being of low-income people in cities.” Recognizing that no single grantmaker has the resources or the knowledge to single-handedly solve the entrenched problems at the heart of the collaborative’s work, Living Cities built its new website as an interactive online platform for fellow problem-solvers to share what they are learning in real time and to invite others to comment and share their knowledge. The goal of Living Cities’ knowledge strategy, according to Chief Operating Officer Elodie Baquerot, is to create a “two-way channel” so partners and others in the field can bounce ideas off one another. “We’re not in competition with the others trying to solve the same problems,” she said. “Our knowledge management system and strategy has to follow suit.”

### 3 Partnership

The key to successful shared learning is *authentic partnership*. For grantmakers, that means actively engaging grantees, partner funders and others to collectively and collaboratively design learning activities, identify learning goals and make meaning of data and information. Is the grantmaker a true partner with a genuine interest in learning with and from others? Or are we still in the driver’s seat when it comes to setting the agenda and identifying takeaways and lessons learned? Learning together is not about inviting partners into a room to give us their knowledge and input and then issuing a report or a memo stating what we are going to do about it. Rather, it is about seeking shared reflection and learning, as well as supporting a collective effort to determine how to apply what we and our partners have learned together.

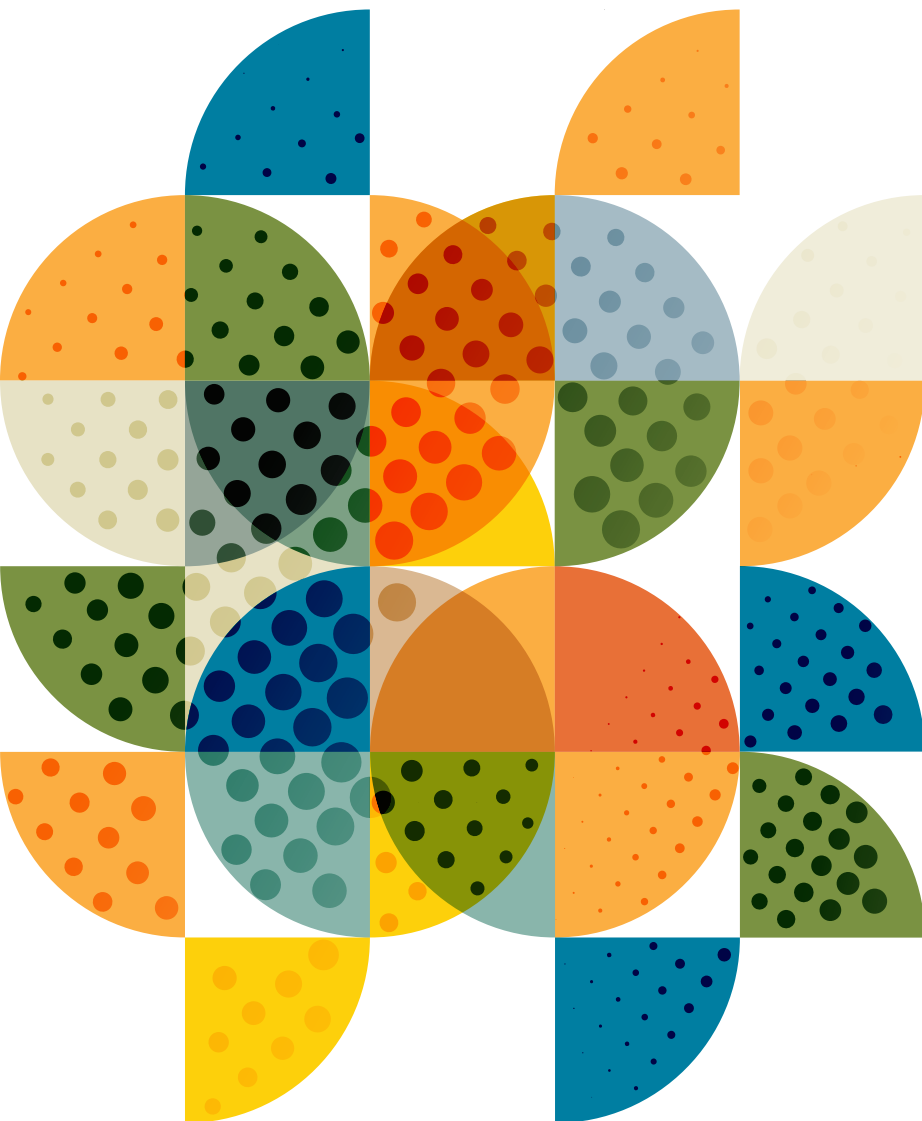
Trustees and staff of **the Peter and Elizabeth C. Tower Foundation**, based in Getzville, New York, recently embarked on a multistep process to determine key results in each of the foundation’s four grantmaking areas: intellectual disabilities, learning disabilities, mental health and substance abuse. As part of the process, the grantmaker organized more than 30 “community vetting sessions” to invite practitioners, community members and others to review and critique draft results statements in each area. Participants in these vetting sessions also made suggestions about indicators to use in tracking results, as well as possible strategies for the foundation to consider.

### 4 Inclusivity

Grantmakers may think they have a limited number of potential learning collaborators, such as core grantees and longtime funding partners. But the truth is that shared learning often delivers better results to the extent that it engages a wider circle of individuals and organizations — in other words, not just the usual suspects. More than a decade after the publication of *The Wisdom of Crowds*, it is now commonly accepted that tapping the knowledge of diverse groups can lead to better answers than relying on one individual or a small, insular circle of people. For grantmakers, this reinforces the importance of always asking the question “Who else?” Who else needs to be at the learning table? Who else has questions we should be trying to answer? Who else needs to know what we are learning? And who else can help shed light on the questions we ask?

The **Stuart Foundation** regularly seeks to broaden the audience for learning beyond the four California counties that are the demonstration sites for its Education Equals Partnership, which works to improve educational outcomes for foster youth. As an example, half of the 200 people at the partnership's 2014 convening were not from the four partnership counties; Los Angeles County, which is not a partnership member, sent a large contingent. "Our goal is to have field-wide impact beyond these four counties alone, so that means creating opportunities to engage others in learning," said Michelle Francois Taiman, associate director of child welfare with the Stuart Foundation and director of the Education Equals Partnership. See page 28.

When grantmakers set out to learn together with partners, the attitude and ethos we bring to the work are key. To the extent that we make a commitment to shared control, remaining open and flexible, working in authentic partnership and embracing inclusivity, we increase the odds that learning together will be a rewarding experience for all involved.



# Question 3:

## What are the KEY STEPS to making shared learning work?

Learning with others does not have to be a huge leap for grantmakers. In some cases, it means opening up existing learning systems and processes so we are involving people outside the foundation and tapping their knowledge, insights and expertise.

That said, successful shared learning happens only to the extent that grantmakers make a real and lasting commitment to it. This means investing time and resources. It also means doing the legwork necessary to build relationships and trust and to create the conditions for success. GEO's research and interviews turned up four critical steps that will increase the chances that learning together delivers on the promise of supporting grantmakers and their partners to get better results.

### 1 Prioritize it

Many of the grantmakers GEO interviewed — even those pioneering work to adopt shared learning as a priority — noted the challenges associated with engaging their entire organizations in this work. Learning together cannot be a priority for foundation evaluation or program staff alone; everyone, including trustees and CEOs, needs to understand the importance of learning together and how it contributes to better outcomes for the grantmaker, its grantees and other partners and people in communities. And this work needs to be built in from the get-go. It is only when learning together becomes a part of the culture and day-to-day practice of a foundation, and when it is integrated into the beginning of a program or initiative, that staff give it the time and space it requires. This means incorporating shared learning into our work with grantees and other partners so it is not an add-on but an essential component of how we do the work.

**United Way of Winnipeg** has made an organization-wide commitment to evaluation and learning in partnership with more than 100 agencies it works with in the community. United Way recently hired its first-ever director of learning and innovation as a way to prioritize learning internally, and it worked closely with community partners to identify shared outcomes to guide everyone's work across three issues: poverty, youth education and healthy families and communities. United Way also partnered with the International Institute for Sustainable Development to develop Peg, a community indicator system that captures and tracks key measures of the well-being of local residents; its tagline is "Tracking Progress, Inspiring Action." Peg was developed as a community resource with extensive input from local residents, nonprofit and government leaders and others about what indicators to measure.

### 2 Allocate the necessary resources

Making shared learning a priority counts for little if grantmakers do not also take steps to ensure that they and their partners have the resources they need to do it well. Learning together does not have to break the bank, but there are clear costs involved when it comes to convening learning



partners, supporting high-quality research and evaluation, communicating findings and setting aside staff time for this work. Many of the grantmakers GEO spoke with are building new learning and evaluation activities into their grants, such as grantee convenings and consistent touchpoints and feedback loops that allow for timely check-ins between them and their grantees and other partners. All of this work requires time and money. To the extent that the work is sufficiently and responsibly resourced (and the shared learning activities are well designed), it will pay off in the form of better outcomes on the ground.

For the last decade, **the California Wellness Foundation** has sponsored an annual learning and evaluation conference for all organizations with active grants from the foundation. The conference includes two days of workshops focused squarely on learning and evaluation. Attendance generally ranges from 200 to 300 people, and the foundation supports grantees' participation by covering all travel expenses. Sample session topics include using evaluation for program planning and fund development, measuring the success of advocacy work and data visualization.


### 3 Build trust and relationships

For some grantmakers, learning together may be a significant change in strategy and approach. And even among those grantmakers for whom collaborative work is a long-standing priority, shared learning can require a different level of trust and a new kind of relationship both with grantees and other partners, as well as internally within the foundation. Learning together effectively requires open dialogue and candor among partners so they can explore issues together, admit what they do and do not know, air disagreements as well as agreements, and be honest about what is working and what is not to get to the outcomes they want. Strengthening relationships so they support this kind of candor and trust can take time — so it needs to start ASAP. That means reaching out to grantees and other partners to explore shared learning goals, creating time and space for open dialogue and ensuring that people understand from the get-go that they can share their knowledge and perspectives without being penalized in some way.

**Deaconess Foundation** in Cleveland recently worked with a grantee to restructure the traditional site visit to emphasize shared learning. Instead of organizing the site visit around a proposal or specific grant, the grantmaker invited the grantee's staff and trustees to share the challenges they encounter in their work as well as their insights for achieving the goals they share with the foundation. Deaconess currently is exploring how to do similar site visits with a wider range of grantees. See page 24.

### 4 Build capacity and skills

Recent field studies tell us that many funders are not paying for the evaluation data we request of grantees and that many nonprofits are hard-pressed to find resources to fund evaluation (see "Introduction," page 3). For shared learning to succeed, grantmakers need to ensure that our grantees and partners have the tools, resources, systems and human capital needed to formulate and answer shared learning questions. The bottom line: Grantmakers should not be creating unfunded mandates by asking for information but not paying for it. At the same time, we also need to recognize that learning together requires a specific set of skills among foundation staff. It is not enough to be an expert in evaluation or knowledge management or to be practiced in strategy development. "To learn well with others, you need to have strong skills in areas like facilitation, communication and translating research for many kinds of audiences," said Joshua Joseph, program officer for planning and evaluation with the Pew Charitable Trusts.

 **Everyday Democracy**, a project of the Paul J. Aicher Foundation, coaches people across the country to bring their communities together in equitable and inclusive dialogue to make progress on some of today's toughest public issues. The organization builds communities' capacity to do this work, including the evaluation of their civic engagement efforts. Among the services Everyday Democracy provides to these communities are technical assistance with the development, and updating of logic models, coaching and advice on evaluation design and data collection and evaluation tools such as surveys and questionnaires. The organization also is shifting to a new data platform that facilitates sharing of data with and among communities.

It is easy to say we want to learn together with grantees and other partners. But grantmakers need to take steps to operationalize our commitment to shared learning. That means prioritizing it, allocating the necessary resources, building trust and relationships with our learning partners and building the essential capacity and skills among grantees and foundation staff.



## ENGAGING COMMUNITIES IN LEARNING

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

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

For the full publication, go to [www.geofunders.org](http://www.geofunders.org).

# FIVE STORIES ABOUT LEARNING TOGETHER

GEO's interviews and research for this publication turned up many examples of how grantmakers are learning together with a range of partners. The following pages share the stories of five of these grantmakers. GEO selected the stories because these grantmakers are upending traditional approaches to learning in philanthropy by actively engaging grantees and other partners in shared learning. The stories include the following:

## **Skillman Foundation**

Supporting staff, grantees and community members to use data more effectively to guide their decisions and measure progress.

## **Deaconess Foundation**

Restructuring the site visit so it is a shared learning opportunity and a chance to forge a different kind of grantmaker–grantee relationship.

## **Stuart Foundation**

Building a learning community of partners working to advance strategies and policies that support foster youth to succeed in school and life.

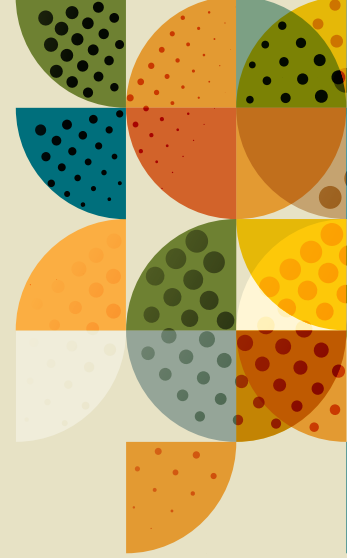
## **Grand Rapids Community Foundation**

Working with the local public schools to design an early scholarship program using an in-depth, real-time evaluation of how it is going.

## **Conrad N. Hilton Foundation**

Enlisting an outside partner to drive continuous learning among grantees and partners working on a specific, time-limited initiative.

Each of the stories also includes a section, “Learning Notes,” highlighting key takeaways and suggesting questions for grantmakers to consider in conversations with foundation colleagues and learning partners. Additional resources and case studies are available online at [www.geofunders.org](http://www.geofunders.org).



## LEARNING TOGETHER PROFILE

# SKILLMAN FOUNDATION

Supporting staff, grantees and community members to use data more effectively to guide their decisions and measure progress.

### THE BIG IDEA

The Skillman Foundation in Detroit is using “data walks” to help foster better understanding of problems and solutions among staff, trustees, grantees and the community. During grantee and community convenings, participants review the latest data on key issues and discuss what the data say about what is working to solve problems and where they can do better.

### THE STORY

From the start of the Skillman Foundation’s Good Neighborhoods program in 2006, evaluation and learning were a critical piece of the work. With a “mega-goal” of reaching a 90 percent high school graduation rate across six targeted neighborhoods in Detroit, Skillman knew it needed to get better at gathering and assessing data so the foundation and its partners could know how they were doing — and where they needed to work smarter. In order to have neighborhood-level data to inform the work, Skillman partnered with the Kresge Foundation in 2008 to create a data repository, Data Driven Detroit. Skillman also contracted with national and local evaluators to provide a rich array of information.

Since 2014, the foundation has focused even more intentionally on equipping its own staff and trustees to use data to drive improvement. Skillman commissioned the Institute for Research and Reform in Education, a nonprofit consultancy that works with schools and school districts across the nation, to help it identify key metrics to assess how kids were faring in the six neighborhoods. Skillman trustees and staff then participated in facilitated sessions and training so they could dig into the data, advance their understanding of key trends and think about whether the foundation’s strategies and investments were right for the job.

At around the same time that they were engaged in this process, Skillman contracted with the Annie E. Casey Foundation to bring Casey’s Results-Based Leadership training to all of the foundation’s staff. In eight sessions over a period of four months, the Skillman staff used data walks to look at disparities in outcomes for kids in the six neighborhoods, and to develop and refine plans for moving the needle on core measures that contribute to children being able to graduate from high school.

## Using Data to Drive Everyone's Learning

Through all of these efforts to improve their use and understanding of data, Skillman's staff and trustees knew that they could not do it on their own. The success of the grantmaker's work relied on what grantees and community members were doing every day in the six neighborhoods. As a result, the grantmaker developed plans for helping grantees and the community become better users and consumers of data. Starting in 2014, the foundation changed the format of the annual grantee meetings it holds in its core strategy areas of education, youth development, safety and community leadership. The previous format, said Marie Colombo, director of evaluation and learning at the foundation, was dominated by Skillman "talking at" grantees about its priorities, theory of change, grant requirements and the like. But now these meetings are focused almost entirely on supporting grantees to use data to learn together.

**"We don't take a finished product to our partners. We bring data to them and walk alongside them as they interpret it."**

*Marie Colombo, director of evaluation and learning, Skillman Foundation*

During the four-hour sessions, participants engage in facilitated data walks to explore what is happening vis-à-vis both the Skillman mega-goal and specific goals related to its strategy areas. At the safety meeting in November 2014, for example, participants worked in small groups to review crime statistics and trends at the neighborhood level plus information from student surveys on school and community safety. With data posters at their tables, they discussed what the data suggested about where there was progress and where there was not. They also made "action commitments" to the group, spelling out what they were going to do in the

following months to help deliver better outcomes for the children in the neighborhoods.

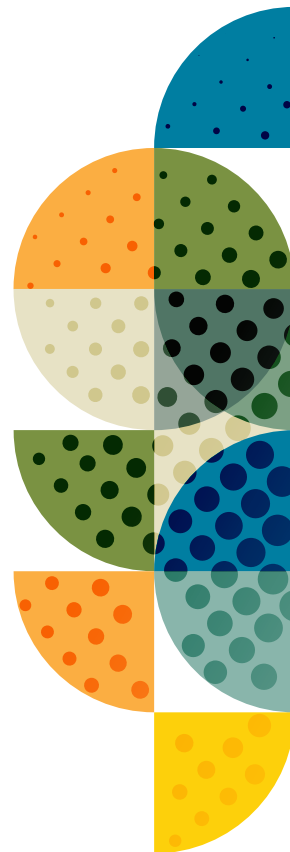
Kim Newberry is program director with Skillman grantee Don Bosco Hall, a nonprofit that is leading youth development work in four of the six neighborhoods where Skillman is investing. Newberry was so impressed with the data walks she encountered during Skillman meetings that she now uses the same process in smaller, neighborhood-level meetings. "Looking at the data and breaking it out to see what it says about what's happening at the school level or the block level helps people see where we are making progress and where we need to do things differently," she said.

As an example, Newberry said data showed that a high percentage of students from one school were saying they did not feel safe getting to and from youth programs at the end of the school day. Based on these data, community agencies changed patrol hours so adults were on the streets not just from 2 to 4 p.m. but from 4 to 8 p.m. as well. "Now we have more kids feeling safe because people took a hard look at the data," Newberry said.

## Engaging the Community

Skillman does not do data walks just with grantees; it also has taken the approach to the community. During a six-month period in 2014 to 2015, the grantmaker organized community meetings in four neighborhoods where residents and community leaders could participate in the data walk process. With as many as 400 participants in each, the meetings followed a format similar to that used for the grantee meetings. Posters displayed easy-to-grasp data on key issues affecting young people in each neighborhood, and participants engaged in deep-divive conversations about the data at their tables.

Colombo said the foundation intentionally designed the community meetings in such a way that participants can arrive at their own conclusions based on the data. She said the





foundation is intent on keeping everyone focused on its mega-goal for high school graduation, as well as the goals for related issues. But it is up to the participants to determine how to use and interpret data in their work toward those goals. “We don’t take a finished product to our partners. We bring data to them and walk alongside them as they interpret it,” Colombo said.

With Skillman’s Good Neighborhoods program drawing to a close in the next two years, the foundation is determined to leave the six neighborhoods in a place where they are able to sustain the work of improving outcomes for kids. For Skillman, that means leaving the neighborhoods and their residents with the capacity to use data on a continuing basis to keep making progress.

James Connell, president of Skillman evaluation partner IRRE, said the grantmaker’s approach to building the capacity of grantees and neighborhoods to use data and learn from it is admirable. “The Skillman posture of not coming in with the answers is refreshing to see. This is about supporting people to look at data together so they can draw conclusions for their own work,” he said.

## ABOUT THE GRANTMAKER

The Skillman Foundation, located in Detroit, launched its 10-year Good Neighborhoods program in 2006. The focus is on improving outcomes for children in six neighborhoods, with an overarching goal of increasing high school graduation rates. Skillman has a long-standing commitment to data-driven learning, having partnered with the Kresge Foundation to support the creation of Data Driven Detroit in 2008.

**Type of funder:** Private foundation

**Geography / Issue area:** Detroit / Education, youth development, community leadership, safety

**Founded:** 1960

**Total assets:** \$480 million

**Annual giving:** \$18 million

**Number of staff:** 30

**Website:** [www.skillman.org](http://www.skillman.org)



Young people from Southwest Detroit discuss data presented at a community meeting organized by the resident-led neighborhood coalition Congress of Communities Southwest Detroit in February of 2015.

# Learning Notes

## **MAKE SURE YOU START WITH GOOD DATA FOCUSED ON IMPORTANT THINGS.**

Participants in activities aimed at using data to drive decisions have to trust the data in the first place. “The credibility of the information you are presenting has to be sacrosanct. You don’t want people questioning your data,” said James Connell of Skillman evaluation partner IRRE.

What are the best and most trustworthy sources of data on the issues at the heart of our work? What data are available from those sources to support shared learning with grantees and others?

## **DISTILL THE DATA SO THAT THE INFORMATION IS USEFUL TO PEOPLE.**

To ensure that data are actionable for participants in these activities, Skillman breaks those data out by neighborhood or school. That way, participants get a good look at where progress is or is not happening. This, in turn, informs their conversations and learning about possible actions.

What do we need to do to put data in a form that our learning partners can easily grasp and use?

## **DON'T COME IN WITH ALL THE ANSWERS.**

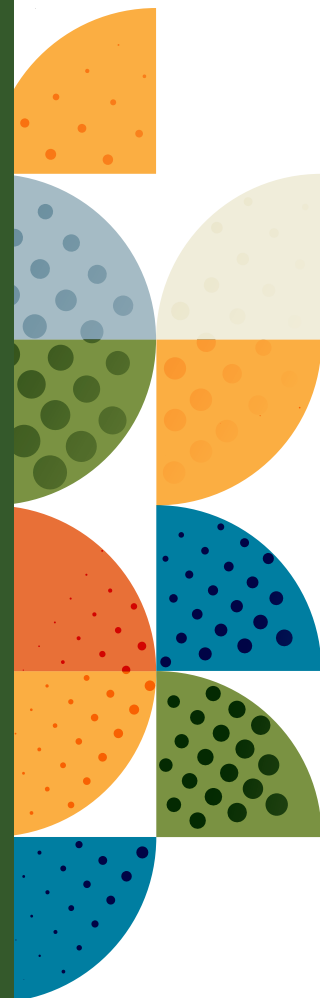
Skillman enters the data walk having already taken the walk itself, but the grantmaker does not steer the conversation. Participants are in the driver’s seat when it comes to making meaning of the data.

Which of our partners would benefit from having more data and information to help them get better results? What can we do to support those partners to make meaning of data?

## **ENSURE THAT LEARNING LEADS TO ACTION.**

Borrowing from the Casey Foundation’s Results-Based Leadership framework, Skillman asks participants in learning activities to make “action commitments” — pledges to do something specific to try and improve outcomes.

How can we design learning activities that lead to action? What can we tweak about current learning activities to support and encourage partners to apply what they learn?



## LEARNING TOGETHER PROFILE

# DEACONESS FOUNDATION

Restructuring the site visit so it is a shared learning opportunity, as well as a chance to forge a different kind of grantmaker–grantee relationship.

### THE BIG IDEA

Deaconess Foundation in Cleveland recently approached a longtime grantee to propose a new learning partnership. The goal: to explore the ins and outs of supporting local residents as they encounter barriers to finding employment. The partnership kicked off with a new kind of site visit where the grantmaker and grantee shared knowledge and insights about the local workforce system and how to strengthen it.

### THE STORY

For many years, Cleveland's Deaconess Foundation had a broad mission to support local residents and families to reach self-sufficiency. In the course of a strategic planning process in 2012 and 2013, the grantmaker shifted its focus to working exclusively on helping disadvantaged Cleveland residents find employment. Recognizing that this new strategic focus matched that of a longtime Deaconess grantee called Towards Employment, the foundation set out to establish a new relationship with the grantee.

Given Towards Employment's deep engagement in the local workforce system, the grantmaker wanted to learn with and from the grantee about the strengths and weaknesses of that system — and how Deaconess's grantmaking dollars could have the biggest impact on helping people get and keep jobs.

"Our strategy was now very much aligned with what Towards Employment was doing, and we wanted to create a stronger partnership where we could learn together how to make a real difference," explained Deborah Vesny, president and CEO of Deaconess Foundation.



## Repurposing a Site Visit

How does a grantmaker make learning a platform for a better relationship with grantees? For Deaconess, it all started with a new kind of site visit, based on the understanding that these face-to-face gatherings could be repurposed to advance the cause of shared learning.

Normally, a Deaconess site visit looks like those conducted by most foundations. Vesey, along with a program officer and a foundation trustee, sits down with the grantee's executive director, one or two grantee staff members, and a grantee board member. The focus of the discussion is the grantee's latest request and what the organization intends to do with the foundation's grant funds.

But for its October 2014 site visit with Towards Employment, Deaconess wanted something different. The foundation was shifting from providing the grantee with an annual program grant to making a significantly larger grant for general operating support, and it wanted to engage at a deeper level with Towards Employment about its work. The goal was not just to learn more about the organization's specific programs and services but also to hear its leaders' take on the problems they are working on every day and to discuss possible solutions together.

"I didn't want this meeting to be something where they were defending to us why they should get our support. We wanted to have a conversation with them at a strategic level," Vesey said.

Deaconess booked a parlor room at a local business club for the meeting, and Vesey brought her program officer along with six of the foundation's trustees, who include business and nonprofit leaders with broad expertise on workforce issues in the city. Participants representing Towards Employment included its executive director, Jill Rizika, along with her director of programs and three of her board members.

In 90 minutes of back-and-forth with the Deaconess contingent, Rizika and her colleagues talked openly about the challenges facing Towards Employment and where the organization wanted to go with its work, while also shining a light on the tough problems facing local residents who are struggling to enter the workforce when coming off of welfare, out of prison or off the streets. The Deaconess and Towards Employment teams also engaged in a lively dialogue about priorities for strengthening the workforce system.

"It was a powerful discussion among a group of people who care deeply about improving the local employment system and who want to learn more about what it is going to take to do that," Vesey said of the meeting.

**"We wanted to create a stronger partnership where we could learn together how to make a real difference."**

*Deborah Vesey, president and CEO,  
Deaconess Foundation*

"It was different because it wasn't about the specifics of our proposal or how we intended to use their grant funds," Rizika echoed. "I had a strong sense of respect from them about the fact we have been working in this arena for many years and have real insights and ideas to share about plugging gaps and strengthening the system."

## Learning: A Foundation-Wide Focus

Deaconess' decision to engage the leaders of Towards Employment in a different kind of site visit is part of a broader commitment to learning at the foundation. At the same time that it adopted a new strategic focus on reducing barriers to employment for disadvantaged populations, the foundation also set out to put learning at the core of what it does. Learning, in fact, is one of three pillars of the foundation's



revamped approach to its work, along with collaborating and maximizing impact.

At first, the foundation focused on getting up to speed on the issue. Deaconess hired a local consultant to help its staff and trustees hone their understanding of the local employment system in Cuyahoga County. “We had to do some real homework on our own because a lot of this work was new to us,” Vesey said. The internal learning process included dedicated staff and board meetings, along with a board retreat focused on the ins and outs of the county employment system.

Next, the grantmaker took its learning out into the open as it began reaching out to key people and organizations to gain their expertise and insights. This ongoing process includes consultations with nonprofit leaders, employers and government. “We are doing this with an eye not just to learning from others but also so we can establish important partnerships that can lead to some type of collaboration down the line,” Vesey said.

## A Stronger Relationship

The October 2014 site visit with Towards Employment was a key moment in the foundation’s transition to a learning organization, and it signaled a new chapter in Deaconess’s relationship with the grantee. Not only is the foundation now providing ramped-up support in the form of annual general operating grants to Towards Employment, but the two organizations are also working in partnership in new ways. Towards Employment, for example, is the lead agency for WorkAdvance, an initiative supported by the federal Social Innovation Fund to improve delivery of workforce services in the region. Deaconess is a supporter of WorkAdvance through its leadership in a regional philanthropy-led initiative called the Fund for Our Economic Future.

“The site visit wasn’t just a one-time thing. We talk a lot more now,” Rizika said of her relationship with Vesey and her colleagues at Deaconess. “There is a very strong understanding that we are in this work together.”

Vesey, for her part, said the foundation’s partnership with Towards Employment has prompted Deaconess to consider how to engage in similar ways with other grantees. “We are at the very start of a journey when it comes to learning with others and reframing our relationships with grantees,” she said.



Towards Employment, a Deaconess Foundation grantee, hosted a series of community meetings in Cleveland in 2014 to discuss barriers to employment and possible solutions.

### ABOUT THE GRANTMAKER

Deaconess Foundation was formed in 1997 from the proceeds of the sale of Cleveland’s Deaconess Hospital. After two decades of focusing broadly on issues of self-sufficiency, the grantmaker adopted a new strategic focus in 2014: helping Cuyahoga County’s disadvantaged residents prepare for, get and keep jobs.

**Type of funder:** Private foundation

**Geography / Issue area:** Cuyahoga County, Ohio / Employment

**Founded:** 1997

**Total assets:** \$44 million

**Annual giving:** \$1.4 million

**Number of staff:** 4

**Website:** [www.deaconessfdn.org](http://www.deaconessfdn.org)

# Learning Notes

## FOCUS ON DEEP LEARNING PARTNERSHIPS WHERE THERE IS HIGH ALIGNMENT.

Towards Employment was a good candidate to road-test Deaconess's new learning approach because of the organization's strong alignment with the foundation's strategic focus.

Which grantees are highly aligned with our overall mission and priorities, and what opportunities do we have to create a stronger dialogue and learning partnership with them?

## EMBRACE A CULTURE OF LEARNING.

A commitment to learning together cannot be a priority for just one or two people at the foundation. Staff and trustees at Deaconess collectively embraced the goal of learning with and from Towards Employment.

To what extent is there a culture of learning already in our office and boardroom? How can we engage trustees and the entire staff in shared learning activities with grantees and other partners?

## START FROM A POSITION OF TRUST.

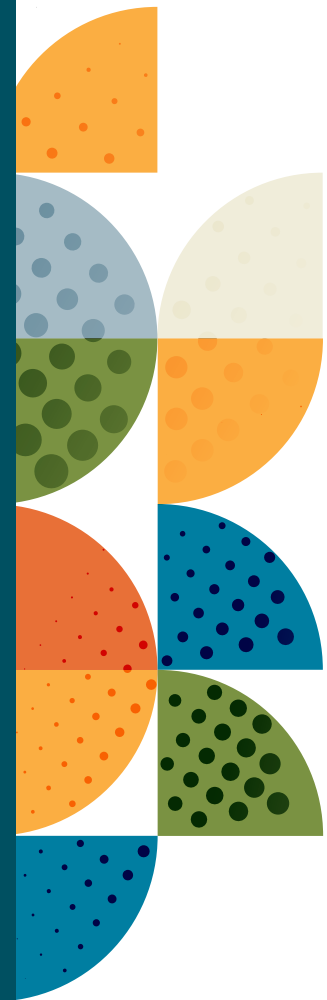
It may be hard to jump straight to learning together with a new grantee. Deaconess had built trust with Towards Employment over many years of grantmaking and showed a sincere commitment to learning with the grantee.

Where do we have the strongest and most trusting relationships with grantees? What is the best way to test and explore new approaches to learning together with those grantees?

## BUILD ON EXISTING OPPORTUNITIES.

Deaconess repurposed a regular site visit to launch a new learning partnership with Towards Employment. To ensure that learning together does not create added burdens for grantees, grantmakers should look for opportunities to bring more learning into existing activities.

In what ways do we currently interact with grantees and other partners, and how can we make learning more of a focus in those events and activities?



## LEARNING TOGETHER PROFILE

# STUART FOUNDATION

Building a learning community of partners working to advance strategies and policies that support foster youth to succeed in school and life.

### THE BIG IDEA

As part of a statewide partnership to strengthen educational outcomes for youth from foster care, the Stuart Foundation is investing in a range of activities for a learning community aimed at cultivating sharing among partners. The learning activities include convenings, Web tools and other activities — and are focused on supporting the four counties involved to learn from each other and to share what they are learning with the wider field.

### THE STORY

Foster youth in California face long odds when it comes to completing high school and enrolling in college. Seeking to do more to narrow the achievement gap for these young people, the Stuart Foundation launched the Education Equals Partnership in 2012. A five-year, \$10 million statewide initiative, the partnership is currently working with four counties across the state (as demonstration sites) to test and implement promising approaches to improve educational outcomes for students from foster care.

From the start of the initiative, the Stuart Foundation believed the four counties would accelerate their progress to the extent that they could share successes and challenges with each other, learn together from national and statewide experts and document the impact of their work. Thus was born a vibrant learning community that includes regular convenings of the four counties, Web-based dialogue and sharing, and developmental evaluation aimed at identifying lessons and takeaways not just for the four counties but also for the wider field.

Avi Khullar, senior program manager with the Stuart Foundation, said the learning community is a reflection of the fact that improving educational outcomes for foster youth relies on a wide range of adults and institutions, from child welfare agencies, schools and courts to foster parents and the youth themselves. “At the core, the partnership is a systems change initiative, and it is based on our belief that no single entity is going to do the job of supporting these young people on its own,” said Michelle Francois Taiman, associate director of child welfare with the Stuart Foundation and director of the Education Equals Partnership. “Many systems need to work together, and people within and across those systems need to learn together how to do it best.”

## Embedding Learning in the Work

The Education Equals Partnership was built on an earlier effort, Ready to Succeed, that sought to lift up best practices in the same four counties for supporting educational achievement for youth in foster care. The Stuart Foundation serves as the “backbone organization” for the partnership and contracts with an Oakland-based communications firm to manage the community of practice that enables the counties to engage in shared learning.

Each county has built a team of partners from the different systems that interact with children in foster care, including representatives of government agencies, schools and community-based organizations. To support the group to learn together, the partnership has built an infrastructure that includes the following:

**Web tools.** The Education Equals Partnership website includes a wealth of resources on the issues, including password-protected sections for sharing documents and data among the counties. Also on the site: a community discussion board where participants can post questions and insights and get real-time help from colleagues.

**Online meetings and webinars.** In order to address the issues at the heart of the counties’ work, the partnership regularly organizes webinars.

**On-site meetings.** Stuart Foundation staff, project evaluators and other “backbone staff” for the partnership visit each county on a regular basis to go over project updates, review progress and brainstorm about possible course corrections.

**Regular learning sessions.** Every other month in 2015, the foundation is hosting cross-county learning sessions on specific topics, such as caregiver engagement and social and emotional learning. These are half-day or full-day events featuring national experts along with ample time for participant dialogue.

Topics are recommended by the advisory council for the partnership, which includes representatives from the four counties.

**An annual convening.** In November 2014, the Stuart Foundation organized a partnership-wide convening in Santa Monica that attracted 200 people from the four counties, along with others who are working on foster care issues across California.

## The User Experience in Focus

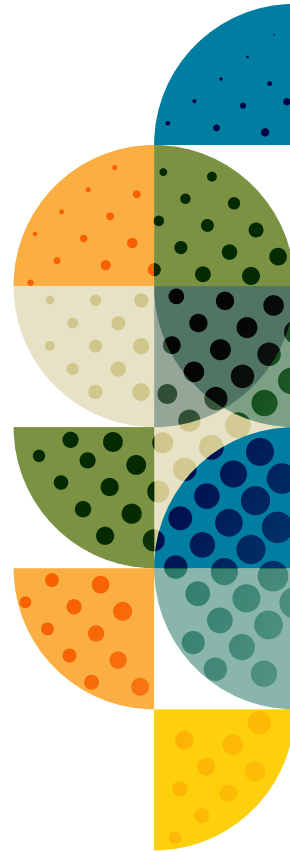
The partnership pays close attention to the user experience for participants in the learning community. Learning resources on the website include video, presentations and hands-on tools, along with more detailed reports and research materials for those wanting to dig deeper into a specific problem or solution. In addition, convenings are designed to ensure that participants are actively engaged rather than passive learners.

*“Learning is clearly embedded in the partnership’s theory of change. It is a huge part of the investment strategy for this work.”*

*Avi Khullar, senior program manager, Stuart Foundation*

“It is our strong belief that practitioners are experts and leaders in their own right,” Khullar said. “So when we design these sessions it is not a classroom setting. We want to nurture and encourage active discussion between invited speakers and participants who are doing the work.” Khullar added that the annual cross-county convening in 2014 included “reflection labs” following all keynote sessions where practitioners could talk together about what they heard and how it applies to their work.

Trish Kennedy, director of foster youth services in the Sacramento County Office of Education, said “transparency” is the buzzword for the counties when it comes to participating in





the Education Equals Partnership learning community. “We are always airing our dirty laundry and talking openly about what’s failed as well as what’s working. That relationship and that open approach to sharing have helped us make improvements at a much faster pace,” she said. The Stuart Foundation’s focus on encouraging shared learning is taking hold among the participating counties as they begin to take more ownership of the learning process themselves. According to Michelle Francois Traiman, the grantmaker began its work with the counties in a directive role — using advisory council input to develop and execute agendas for convenings and other learning. In the last year, however, Francois Traiman said the work has shifted and the foundation is taking a more “backseat role.” “We are seeing the counties really take charge when it comes to setting agendas and leading the discussion to issues and topics where they want to focus,” she said.

## ABOUT THE GRANTMAKER

The Stuart Foundation became an independent family foundation in 1985 after the merger of three trusts created by the founder of the Carnation Company and his wife and son. Based in San Francisco, the foundation is dedicated to the protection, education and development of children and youth in California and Washington.

**Type of funder:** Family foundation

**Geography / Issue area:** California and Washington / Education and child welfare

**Founded:** 1937

**Total assets:** More than \$500 million

**Annual giving:** \$15 million

**Number of staff:** 20

**Website:** [www.stuartfoundation.org](http://www.stuartfoundation.org)



Dr. Chandra Ghosh-Ippen leads a session on integrating trauma-informed practices at a November 2014 Education Equals Partnership convening.



# Learning Notes

## IT TAKES INVESTMENT.

The Stuart Foundation has made substantial investments in the learning community and the infrastructure to support sharing among participants in the Education Equals Partnership initiative, from Web-based learning platforms to convenings. “Don’t expect a great community of practice to emerge on a dime,” Francois Traiman advised.

What investments are we currently making to support grantees to learn together? What more could we do, and how can we redirect other nonmonetary resources, such as staff time, to this work?

## TWEAK OR REVAMP EXISTING ACTIVITIES TO FOCUS ON LEARNING.

The Education Equals Partnership was built on a prior initiative involving the four counties. The counties already knew and trusted each other, and the foundation was seeking to leverage those existing relationships into something bigger.

What current activities are we funding that we could ramp up to focus more squarely on shared learning?

## FOCUS ON THE USER EXPERIENCE.

The Stuart Foundation’s focus on a positive user experience for participants reflects the realization that people learn better when they have ample time and space for learning, when they can take ownership of learning and when it is an enjoyable experience.

How do participants currently experience our convenings and learning activities? What do our materials look like? How can we improve the look, feel and experience of what we are doing to help people become more engaged and more enthusiastic about learning?

For more on what it takes to design, execute and extend the success of learning communities, see the 2012 GEO publication *Learn and Let Learn*, available at [www.geofunders.org](http://www.geofunders.org).

## LEARNING TOGETHER PROFILE

# GRAND RAPIDS COMMUNITY FOUNDATION

Working with the local public schools to design an early scholarship program using an in-depth, real time evaluation of how it's going.

### THE BIG IDEA

The Challenge Scholars initiative is a partnership between Grand Rapids Community Foundation and the local public school district. The two partners worked together with a consultant to design a wide-ranging developmental evaluation of the initiative that delivers real-time information and insights about how they can get ever-improving results.

### THE STORY

About a decade ago, the board and staff of Grand Rapids Community Foundation began to wonder if their investments in education, a longtime priority for the grantmaker, were really making a difference in improving outcomes for students in the city's public schools. The foundation hired a consultant to look into it. Program Director Cris Kutzli recalls sitting in a room with the foundation's board and staff as the consulting team presented a slideshow on its findings in 2008. "They had a slide that showed our investments against educational outcomes for students, and there was zero correlation, nothing," Kutzli said. She continued, "Our gut instinct was spot on: We were making investments without impact."

As a result of that presentation and the foundation's determination to do better by the city's students, its trustees embraced a new "North Star" for the grantmaker's education work — a clear goal it could aspire to and against which it could measure its success. That goal is supporting first-generation college students from low-income families in Grand Rapids to complete a college degree or "high-quality credential." The vehicle for achieving the goal is a new initiative designed in partnership with Grand Rapids Public Schools. Challenge Scholars, the initiative, supports students to get ready for college or vocational training and promises them a free postsecondary education. Students enroll in the program in sixth grade; the first class of Challenge Scholars will enter high school in the fall of 2016.



## A Collaboratively Designed Evaluation

From the start of Challenge Scholars, the staff and trustees of Grand Rapids Community Foundation set out to establish a close working partnership with the school district. “We knew we could not do this alone,” Kutzli said. “As grantmakers, we talk all the time about collaboration and systems alignment, and we needed to practice what we were preaching.”

In addition to working closely with the district on the design of the initiative, the grantmaker enlisted Grand Rapids Public Schools to help shape a rigorous evaluation. “Learning together was always going to be a crucial piece of this,” Kutzli said of the initiative, which is focused on three schools in a low-income neighborhood in the city’s west side.

Working together, the foundation and the school district drafted a request for proposal for the evaluation of this program, vetted proposals and interviewed prospective evaluators from across the country. After they selected the consulting firm FSG as the project’s evaluator, the school district and the foundation met with the consultants to devise an evaluation approach.

The learning partnership between the foundation and the schools experienced a learning moment early in the partnership when FSG presented an evaluation plan informed by literature review and stakeholder interviews. When the school district team saw the plan, they got the impression that it was a done deal. “They felt it was cooked,” Kutzli said. “They didn’t feel they had enough input, and this was something that looked like a final product.”

Although the evaluation plan was “technically sound,” the evaluators took account of the district’s concerns and recalibrated, convening core teams from the foundation and the district to spend a day and a half in a room hashing out the details of the evaluation plan from scratch. The resulting plan may not have been a huge

departure from FSG’s original proposal, but now it had the district’s full support and buy-in.

“What you realize in a partnership like this is how important process is,” Kutzli said. “When you acknowledge misunderstandings and you make a commitment to really working together, that’s when the partnership takes off.”

## Course Corrections on the Fly

Working with FSG, the foundation and the school district designed a developmental evaluation for Challenge Scholars. The partners’ approach to evaluation is summed up in a description on the website for the initiative: “Challenge Scholars is ever-evolving, always learning and using data judiciously to measure success and make decisions.”

**“What you realize in a partnership like this is how important process is. When you acknowledge mistakes and you make a commitment to really working together, that’s when the partnership takes off.”**

*Cris Kutzli, program director, Grand Rapids Community Foundation*

Mary Jo Kuhlman, assistant superintendent for organizational learning with Grand Rapids Public Schools, said “real time learning” is the focus of the evaluation. “We need to learn together what’s working to build a college and career culture in these schools. We need to learn together how parents and families are getting engaged. And we need to learn together what we need to do to get ever-improving results.”

FSG conducts interviews, focus groups, surveys and other data collection so it can prepare quarterly “learning memos” for the partners. The evaluators hold monthly check-in calls and also meet with the partners four to five times a year when they are in Grand Rapids to do

their research. The Challenge Scholars partners discuss the evaluation findings in monthly meetings and make decisions accordingly.

“A lot of the time the evaluation will surface issues we are already aware of, but it often flags things we need to pay attention to as the work continues,” Kutzli said.

Kutzli points to several examples of how the partners have pivoted their approach based on FSG’s evaluation. For example, early on in the work the evaluators noted that although a core group of parents were highly informed about Challenge Scholars, that awareness did not extend to the majority of parents. As a result, the partners currently are exploring how to develop what Kutzli calls a “more relational, one-to-one approach” to engaging all parents.

Similarly, the evaluators noticed that middle school parents in focus groups expressed apprehension about their children going to the neighborhood high school because it was so big and they did not know the teachers and staff. Based on this knowledge, the district took steps to make the high school more approachable for parents and their children. The high school principal, for example, started attending parent meetings at the middle school to meet and greet parents, and the middle school organized select events in the high school buildings.

As they continue their multiyear partnership on the Challenge Scholars initiative, Grand Rapids Community Foundation and Grand Rapids Public Schools are committed to learning together as they go. “We have a deep appreciation for the foundation, and it’s not just about their financial support for this initiative,” said Kuhlman of Grand Rapids Public Schools. “They are a true and authentic partner, and I am convinced this initiative will be more successful because of how we are working together.”

## ABOUT THE GRANTMAKER

Grand Rapids Community Foundation was established in 1922 to serve the city and the people of Grand Rapids, Michigan. It has provided grants and scholarships totaling more than \$100 million. Challenge Scholars, with a fundraising goal of \$32 million, is currently the grantmaker’s largest community initiative.

**Type of funder:** Community foundation

**Geography / Issue area:** Kent County, Michigan

**Founded:** 1922

**Total assets:** \$329 million

**Annual giving:** \$10.6 million

**Number of staff:** 25

**Website:** [www.grfoundation.org](http://www.grfoundation.org)



Challenge Scholars students having fun dissecting a bug at summer camp.

# Learning Notes

## REMEMBER THAT EARLY INVOLVEMENT MATTERS.

A partnership suffers when people do not feel like equal partners. When the school district expressed concerns that it did not have sufficient input in the evaluation design, the evaluator started over and engaged both partners to craft a new plan.

Are we presenting grantees and other partners with “fully cooked” (or nearly so) plans for programs and evaluation? How can we enlist partners earlier in the process?

## GO WIDE AND DEEP WHEN GATHERING DATA AND INFORMATION.

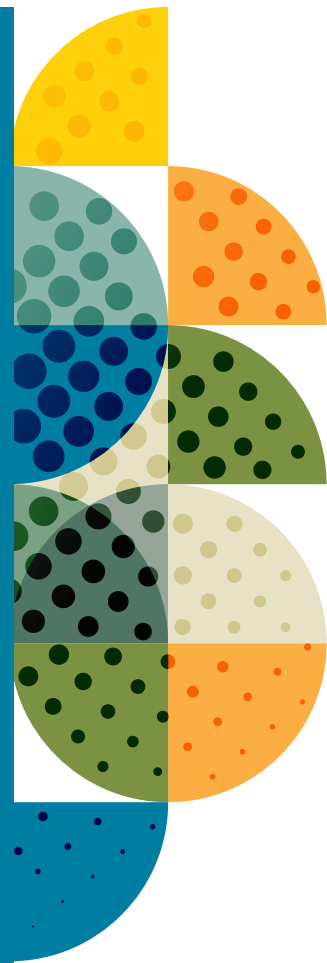
FSG’s evaluation of the Challenge Scholars initiative relies on data collection from schools, interviews, focus groups with parents and students, and a range of other activities. This gives the project partners a wealth of information (both quantitative and qualitative) and perspectives on which to base their decisions and course corrections.

Do the data we collect give us a true picture of the perspectives of grantees and people affected by our grantmaking? What more can we do to make sure we know how our programs are working on the ground?

## MAKE SURE YOU AND YOUR PARTNERS ARE OPEN TO CHANGING COURSE.

Grand Rapids Public Schools and Grand Rapids Community Foundation are in continuous contact and are always looking at how to improve results based on information from their evaluation.

How much are we talking to our partners over the course of an initiative? Are all partners open to being flexible and revising or changing strategies based on what we are learning?



# CONRAD N. HILTON FOUNDATION

Enlisting an outside partner to drive continuous learning among grantees and partners working on a specific, time-limited initiative.

## THE BIG IDEA

The Conrad N. Hilton Foundation embeds collective learning into the design of six strategic initiatives, each involving as many as 50 grantees working toward a shared set of goals. To reduce the burden on grantees, a university or consultant team takes responsibility for managing evaluation and learning for an initiative, producing regular reports for the group and supporting grantees in their learning work. The grantmaker also organizes annual convenings for each group of grantees and other partners so they can learn from one other.

## THE STORY

The Hilton Foundation announced a new approach to its work in 2008. In addition to ongoing grantmaking in five areas that were historically important to the foundation, it would now invest in six “strategic initiatives” focused on issues ranging from homelessness in its hometown of Los Angeles to the availability of safe water for people in developing countries. Each of the six initiatives would span five years of work with a core group of 25 to 50 grantees, and each initiative would be designed to achieve a specific and measurable goal.

Learning from the strategic initiatives was a priority for the foundation from the start. The grantmaker described its approach to the initiatives as “partnering with grantees, generating new knowledge, giving voice to issues and joining with others to achieve measurable impact.” Given the limited time horizon for the initiatives, the Hilton Foundation set out to create a learning strategy that would provide a steady flow of data and information to the foundation and its grantees in real time about how things were going, what they could do differently to get better results and what they were learning that could be useful to others doing similar work.

The strategy the foundation eventually settled on is MEL: monitoring, evaluation and learning. For each of the six initiatives, the Hilton Foundation has designated a MEL partner—either a university or research consulting firm—to lead the evaluation work.

“[The partner’s] job is not to issue a report card on each grantee’s performance but to track the collective impact of our partners on that particular issue over time,” said Edmund Cain, vice president of grant programs with the foundation.

The Hilton Foundation had intended to develop its learning and evaluation plans for each of the strategic initiatives in concert with the actual program strategies and goals. But for various reasons, this was not possible. As a result, Cain said the MEL work has in some cases been “grafted on” to an existing program when it might have been better to align learning and program goals from the start.

## Learning as the Initiative Unfolds

The first to go live with a MEL partner was the homelessness program. (Goal: eliminate chronic homelessness in Los Angeles County.) The MEL partner for this program is Abt Associates, a research and consulting firm with expertise in social policy issues. Abt’s role is to capture and share what the foundation and its grantees are learning on an ongoing basis for the duration of the initiative. “We are not looking for one final, after-the-fact report,” Cain said. “We want the learning to happen as the work happens so it can inform the work.”

The Hilton Foundation knew from the outset that it did not want its evaluation efforts to place added burdens on grantees, so Abt gathers information from existing grantee reports and other independent research. For the homelessness initiative, this additional research has included “stakeholder surveys” of community members who are involved in the issue, focus groups with residents of public housing projects and review of data and reporting from government agencies, nonprofits and coalitions.

The firm shares its findings in interim reports issued to the foundation and its grantees on an

annual basis for the duration of the grant, and these are disseminated in meetings and on the foundation’s website. Each report includes easy-to-read dashboards showing where the partners are vis-à-vis specific goals for the initiative (e.g., “progress toward goal to create 5,000 units of permanent supportive housing”). The purpose of the reports is to help everyone understand where they are making progress together, and where they need to do better.

“The evaluation we are doing is designed as much for the field as it is for the foundation,” Cain said. “We want to help inform the sector so everyone is on the same page about what’s happening with respect to ending chronic homelessness in Los Angeles County.”

## Advancing Applied Learning

To help make sure the evaluation results lead to real learning and action on the ground, the Hilton Foundation organizes an annual convening for grantees and others working on the issues that are the focus of each of its six strategic initiatives. The most recent convening for the homelessness initiative was held in the fall of 2014 at the Japanese American National Museum in downtown Los Angeles. The event attracted nearly 100 attendees — including grantees, funding partners, policymakers and others — for a daylong program of presentations and dialogue on the problem of chronic homelessness and the status of the partners’ efforts to end it.

**“We are not looking for one final, after-the-fact report. We want the learning to happen as the work happens so it can inform the work.”**

*Edmund Cain, vice president of grant programs,  
Conrad N. Hilton Foundation*

The day started with presentations by issue experts and a special address by the speaker of the California State Assembly, Toni G. Atkins, a



leading advocate for affordable housing in the state. The program also featured discussions led by Hilton Foundation partners in the community. As part of the agenda, Abt Associates shared highlights from its third-year evaluation report. Most of the afternoon was reserved for table discussions among the foundation's grantees that allowed them to reflect on what they heard, the obstacles they are encountering in their work and how to ramp up impact.

Christine Margiotta is vice president for community impact with United Way Los Angeles, which has received significant support from the Hilton Foundation to create and implement Home for Good, a community-wide homelessness initiative in partnership with the Los Angeles Chamber of Commerce. Margiotta said the annual convening provides a much-needed "moment of reflection" for people engaged in the work of ending homelessness in the county. She added that the evaluation and reporting by Abt Associates have provided "great, real-time feedback" as United Way and other partners do their work.

"The learning and evaluation work supported by Hilton Foundation has made a huge contribution to bringing people together and helping all of us develop a common understanding of what we need to do to get to the goals we all share for this community," Margiotta said.

Margiotta is not alone in crediting the Hilton Foundation's collaborative approach to learning. The grantmaker recently received the findings from its latest Grantee Perception Report by the Center for Effective Philanthropy. Across the board, grantees pointed to the foundation's role in convening partners and engaging stakeholders in its work. Wrote one respondent: "The best asset of the [Conrad N. Hilton Foundation] is that they use both their funds and their convening power. That is often as valuable as the money."



Grantees, funding partners and public-sector representatives gather for the Hilton Foundation's 2014 convening to discuss collective progress on ending chronic homelessness in Los Angeles County.

## ABOUT THE GRANTMAKER

The Conrad N. Hilton Foundation is a family foundation based in the Los Angeles area. It was established in 1944 by the man who started Hilton Hotels. The foundation invests in 11 priority areas, including six strategic initiatives focused on issues from homelessness to children affected by HIV and AIDS to water. Half of the foundation's grants are made internationally.

**Type of funder:** Family foundation  
**Geography / issue area:** Worldwide  
**Founded:** 1944  
**Total assets:** \$2.5 billion  
**Annual giving:** \$100 million  
**Number of staff:** 55  
**Website:** [www.hiltonfoundation.org](http://www.hiltonfoundation.org)

# Learning Notes

## DEVELOP LEARNING AND PROGRAM STRATEGIES IN TANDEM.

As Cain noted, in some cases the MEL work has been incorporated into an existing program after the program was up and running, which is not the optimum scenario.

What can we do as we are designing and planning new initiatives to ensure that learning together is a built-in priority from the start? Do we have any initiatives currently in the planning stages where we can do this? How can we incorporate learning together efforts into our ongoing work?

## SUPPORT YOUR PARTNERS TO MAKE MEANING OF DATA AND INFORMATION.

The Hilton Foundation's learning and evaluation partner for the five-year homelessness initiative issues an annual "interim" report every year. The grantmaker then organizes an annual convening to help grantees and other partners make meaning of the evaluation findings and draw lessons for their work.

How can we make sure that grantees and other partners have time and space to digest the evaluation data and reports produced? How can we support opportunities for partners to make meaning of data and information?

## BE WARY OF PLACING ADDITIONAL BURDENS ON GRANTEEES.

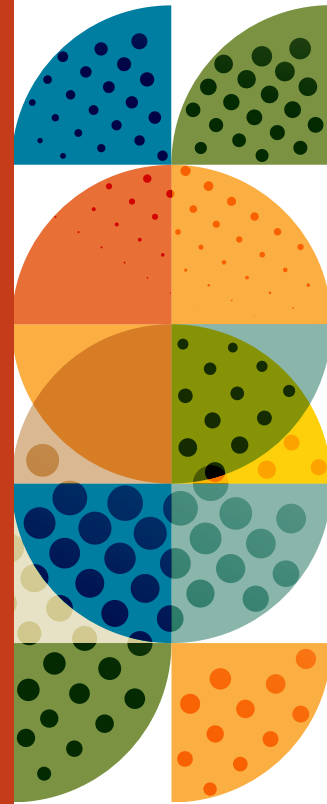
The Hilton Foundation is "extremely sensitive," in Cain's words, about the degree to which its evaluation activities place additional burdens on grantees. To the extent possible, the evaluation partners base their work on existing grantee reports as well as independent research.

What burdens do we currently place on grantees in our efforts to learn and evaluate, and how might we mitigate those burdens? To what extent can we use grantee reports and existing information to support shared learning?

## SUPPORT FIELD LEARNING.

The Hilton Foundation's goal for its homelessness work requires engagement of a variety of partners throughout Los Angeles County. As a result, it tailors its research and learning to support fieldwide progress as well as grantee success.

Who else beyond our grantees and funding partners can benefit from the information and data we are collecting? How can we include these audiences in shared learning activities?



# CONCLUSION



Grantmakers have ambitious goals for the work we do with our grantees and other partners. Learning together with those partners is the only way to find lasting solutions.

By learning together, we ensure that our work is informed and guided by a sophisticated understanding of what works, current knowledge and information about how things are going and what we can do better, and helpful perspectives and insights from a range of practitioners, community members and other experts. We also ensure that learning drives improvement because everyone who is involved in the work is there at the table with us. The lessons from shared learning can be applied on the ground in real time to get better results.

The following is a brief summary of the information presented in this publication, along with action steps grantmakers and learning partners can consider as we seek to apply this information to our work.

## Five grantmaker stories

The publication tells the stories of five grantmakers that have made a commitment to learning together with a range of partners:

-  The **Skillman Foundation** in Detroit is using “data walks” to help foster better understanding of problems and solutions among staff, trustees, grantees and the community. During grantee and community convenings, participants review the latest data on key issues and discuss what the data say about what is working to solve problems and where they can do better.
-  **Deaconess Foundation** in Cleveland approached a longtime grantee to propose a new learning partnership. The goal: to explore the ins and outs of supporting local residents encountering barriers to employment. The partnership kicked off with a new kind of site visit where the grantmaker and grantee shared knowledge and insights about the local workforce system and how to strengthen it.
-  As part of a statewide partnership to strengthen educational outcomes for youth from foster care, the **Stuart Foundation** is investing in a range of activities for a learning community aimed at cultivating sharing among partners. The learning activities include convenings, Web tools and other activities — and are focused on supporting the four counties involved to learn from each other and to share what they are learning with the wider field.
-  The Challenge Scholars initiative is a partnership between **Grand Rapids Community Foundation** and the local public school district. The two partners worked together with a consultant to design a wide-ranging developmental evaluation of the initiative that delivers real-time information and insights about how they can get ever-improving results.
-  The **Conrad N. Hilton Foundation** embeds collective learning into the design of six strategic initiatives, each involving as many as 50 grantees working toward shared goals. To reduce the burden on grantees, a university or consultant team takes responsibility for managing evaluation and learning for each initiative, producing regular reports for the group and supporting grantees in their learning work. The grantmaker also organizes annual convenings for each group of grantees and other partners so they can learn from each other.



## ACTION STEPS:

- Discuss the case studies in this publication with your foundation colleagues, including the takeaways and discussion questions at the end of each write-up. Which of the cases highlights useful ideas for something you might be able to do right now?
- Share these stories with grantees and potential learning partners to spark new thinking and conversation about how you can learn together more effectively.

## Three guiding questions

In this publication, GEO presents three questions grantmakers and their partners can use to create effective opportunities for learning together.

### Question 1: WHAT do we want to learn together — and WHY?

Being deliberate about your intentions is a first critical step in learning together. There are several possible goals for shared learning. In some cases, we might be working with more than one goal in mind: 1. Analyzing and building shared knowledge of an issue; 2. Developing a new plan or initiative; 3. Assessing current activities to identify course corrections; and 4. Understanding outcomes from completed projects.

#### ACTION STEPS:

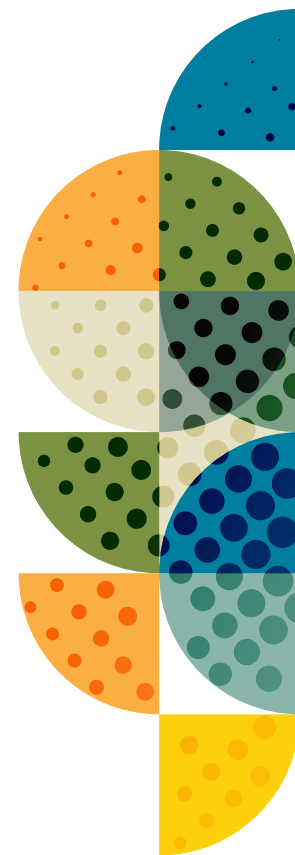
- Create opportunities for foundation staff, trustees, grantees and other partners to discuss and decide on learning goals connected to the organization's overall work or specific initiatives.
- If you are already engaged in learning activities with partners, assess to what extent those activities are based on clear learning goals that you and your partners share.
- Work with partners to design learning activities tailored to specific shared goals.

### Question 2: What are the core VALUES and PRINCIPLES we should keep in mind to ensure the success of shared learning?

Four key values and principles are at the heart of shared learning: 1. Shared control; 2. Openness and flexibility; 3. Partnership; and 4. Inclusivity. They are important drivers of our ability to learn together with others.

#### ACTION STEPS:

- If you already are engaged in activities you consider to be good examples of shared learning, test to what extent those activities conform to these values and principles.
- If your learning activities do not reflect these values and principles, consider how to strengthen what you are doing so it shows a true commitment to learning together.
- Organize trustee and staff discussions of these values and principles to build foundation-wide buy-in and support for what it takes to make learning together successful.



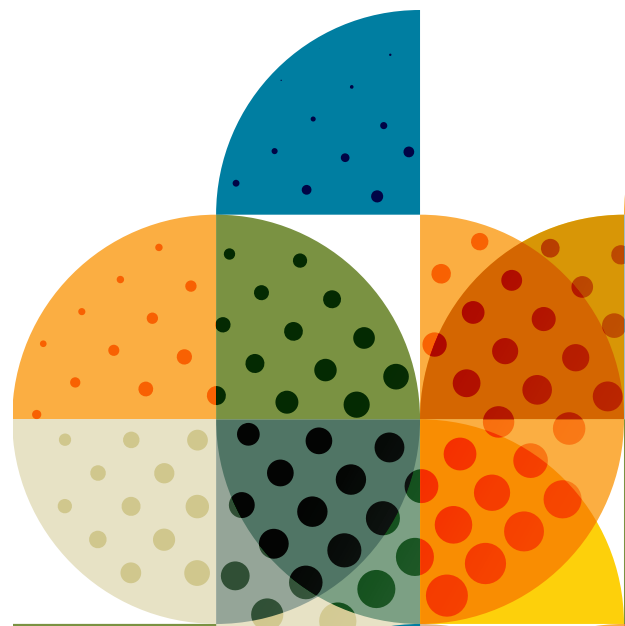
### Question 3: What are the KEY STEPS to making shared learning work?

Shared learning will happen only to the extent that grantmakers make a real and lasting commitment to it. Taking these four key steps will increase your chances of success: 1. Prioritize it; 2. Allocate the necessary resources; 3. Build trust and relationships; and 4. Build capacity and skills for the work of learning together.

#### ACTION STEPS:

- Assess the degree to which your foundation prioritizes shared learning and allocates the necessary resources for it. Do you fund grantee evaluation? Are you investing in staff and grantee skills for shared learning? Use your assessment as the basis for trustee and staff conversations about how to do better.
- Reach out to grantees and other partners to express your interest in learning together. Share this publication with partners and ask: What more can we be doing to support collective learning? If we are not already learning together, how can we start?

Evaluation and learning remain a touchy subject for many grantmakers and grantees. Grantees often fear that evaluation is merely a time-consuming compliance exercise (or worse, that less-than-stellar results will lead to the loss of funding), while grantmakers tend to view it as a painful but necessary activity for monitoring performance and reporting to the board. It is time once and for all to shift our understanding of learning so that it is focused squarely on improvement — and so that it engages grantees and other partners in ways that yield rewards for everyone involved.



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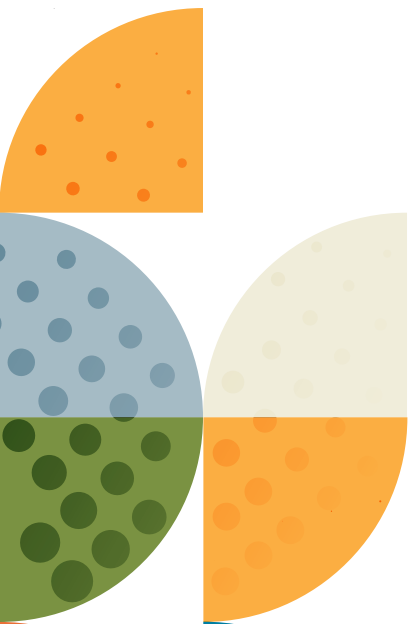
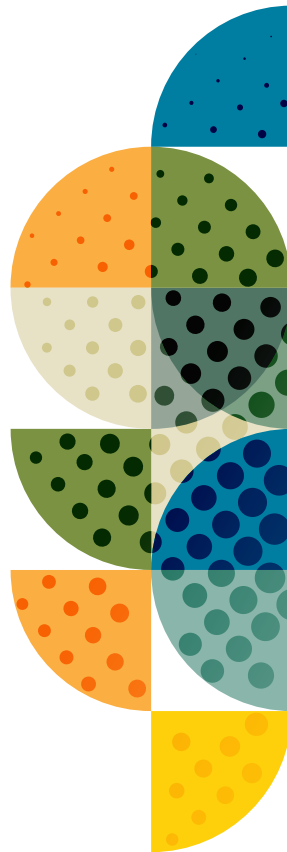
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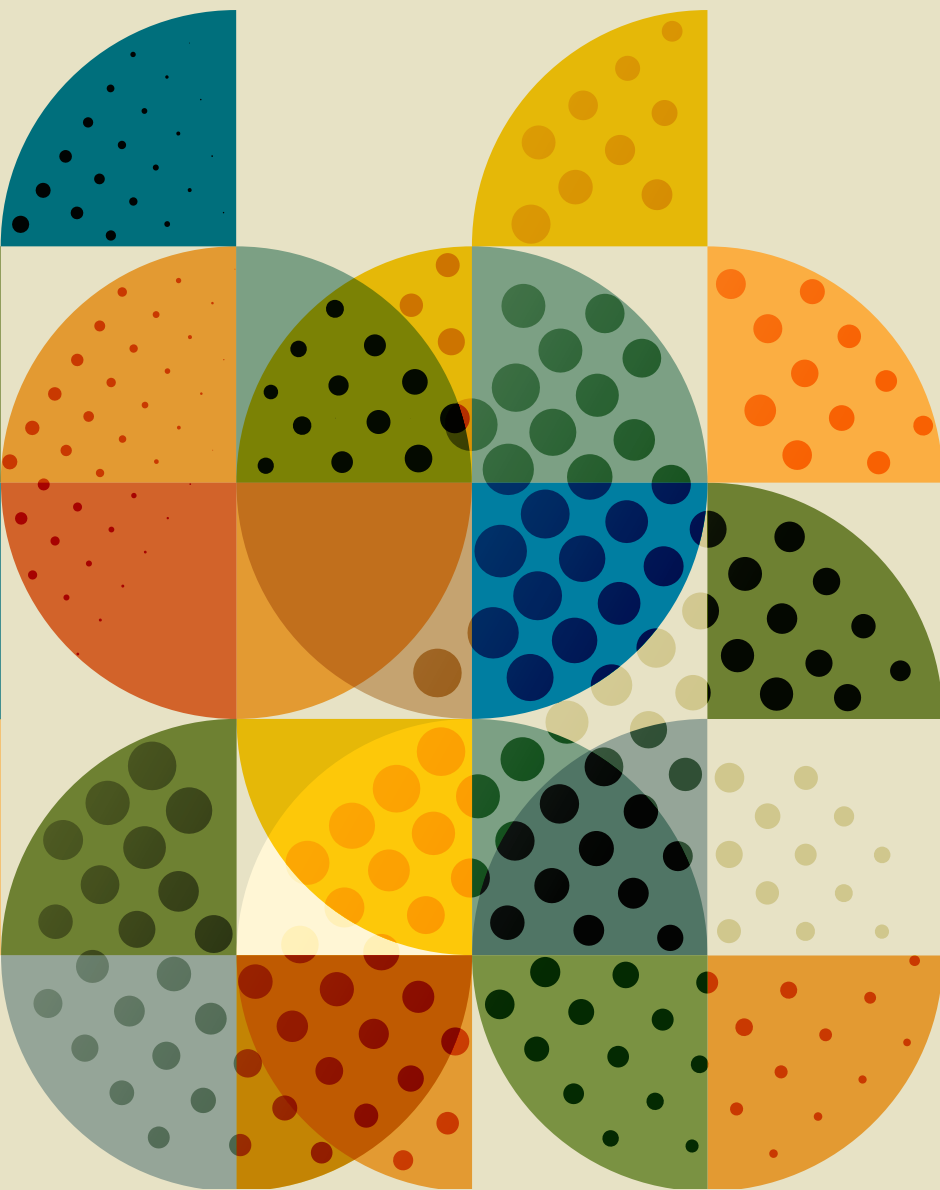
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