

## Becoming a Learning Organization

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While most foundations tend to refer to themselves as “learning organizations,” very few actually achieve that goal in practice, in my experience. Aspects of organizational structure and culture or longstanding commitments to certain ideas or organizations can create barriers to the seemingly simple notion of making learning an institutional priority.

What would a foundation look like that was truly committed to the goal of developing a learning organization? It would frequently ask itself the question “How do we know we’re being effective?”

The first and most critical step toward that goal is an ongoing effort on the part of all the members of the organization to hold themselves accountable for the wise stewardship of the foundation’s resources. This entails regularly addressing the following five questions:

- Are our grantmaking priorities meaningful? (planning; prioritization)
- Are we picking the right organizations to fund? (due diligence; grantmaking procedures)
- Are they having an effect? (evaluation)
- What are we (the foundation and its grantees) learning? (candid self assessment)
  - Are we strategically communicating what we’re learning to key audiences? (dissemination)

These questions get at the basic dimensions of a foundation’s operations. Regularly revisiting them constitutes the essence of the “reflective practice” of philanthropy. That is when continuous improvement of organizational effectiveness becomes more than just rhetoric.

A commitment to learning and growing can shape the daily life of the foundation in many ways. Naturally, the “core business” of grantmaking comes first. The key is balance and proportion in scheduling. What follows are a few illustrative examples of activities that can enhance and inform the foundation’s grantmaking decisions.

- **Board Level:**

Board members have only a limited amount of time to devote to foundation business in the course of a year; therefore, it's essential that those "windows of opportunity" be maximized to the fullest. Accomplish this via thoughtful yet concise written communications from staff and careful planning of board meetings. Group site visits could also be arranged as a prelude to board meetings for those who can attend.

- **Program Officer:**

At the level of the individual Program Officer, a prime venue for learning is the review of proposed grants prior to each board meeting. This provides a regular opportunity for feedback on the quality of the program officer's written analyses and their evolving grantmaking strategies. Another important activity is the preparation of a closeout report at the completion of each grant to assess the degree to which the grantee met its goals. Of particular interest are insights into things that did not work out as anticipated and lessons learned that might influence future grantmaking. For large grants, an "exit interview" might be justified to get as full a picture as possible of what happened. Sharing summaries of these reports with the board can also enhance its learning. One of the frustrations many foundation board members experience is never hearing a report back on the results of grants once they have been approved. This simple mechanism helps to "close that loop."

- **Convene:**

Outside the organization itself, a powerful vehicle for learning is foundation-initiated convening. Draw from a wide spectrum of formats, from informal gatherings of funders with a guest over lunch, to off-site facilitated retreat-type meetings for selected groups of grantees, to full-blown conferences on topics central to the work of the foundation. The foundation can frame the issues and select appropriate facilitators, speakers and attendees to maximize the potential for truly significant learning. Of course, the extra payoffs of such events are the unplanned synergies (e.g. connections that happen among attendees) that can lead to creative breakthroughs and new working partnerships.

- **Communications:**

Be sure to share information on the work of grantees and lessons learned from the foundation's programs with a variety of audiences. Not many foundations do this well. Some tend toward self-aggrandizement or information overkill (how many foundation-generated products can even a voracious audience absorb?).

More often, foundations share virtually nothing about their work other than an annual report. The challenge is to strike a balance between these extremes.

- **Solicit External Feedback:**

Finally, it's essential for a learning organization to solicit feedback from its constituents on its own performance. This can take the form of grantee surveys, focus groups, phone interviews, or mail back comment cards on publications. What is most important is that the foundation demonstrates its commitment to good listening. The next step is to post the results of those surveys on the Web and indicate how the foundation intends to respond. That's a step in the direction of transparency that few foundations have taken.

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