



GEO Action Learning

Peer Groups for Improved Grantmaking Practice

GEO’s action learning work helps grantmakers translate what they know into improved practice. Action learning is a process for bringing together a group of people to analyze a work problem and develop action plans, grounded in the belief that in order for learning to take root, people need to explore the area *with suitable questions and help from other people in similar positions*.

What do grantmakers gain from participating?



Grantmakers share challenges and discuss solutions.

Grantmakers delve deeper into challenges with a room full of smart, experienced colleagues by sharing lessons from recent efforts.

Based on the stories and lessons shared, the group identifies insights about what works and doesn’t and then develops theories of success about what could strengthen their own work. Participants examine upcoming opportunities to test their theories, leaving with specific action plans that integrate key lessons.

In addition, participants learn an easy but powerful process that can be applied to other challenges. Several past participants are now using this approach internally and with their grantees.

What changes have grantmakers made as a result of their participation?

An independent evaluation of two of GEO’s first year of action learning groups found that when a focused group of peers comes together to share their experience and collectively work on theories of success, this leads to improved practice:

- 100% reported having had a valuable/very valuable experience
- 73% achieved many or all of the goals they identified at the retreat
- 78% saw changes as a result of their participation
- Two-thirds reported that the process helped them be a catalyst for change in their organizations
- In all cases, participants translated what they learned with their peers into action plans specific to their organization



Planning for action helps support change.

Actions taken as a result of their participation ranged from significant changes ...

- Two foundations chose to infuse leadership support throughout other grantmaking areas instead of housing leadership development in just one programmatic area.
- Several participants decided to pool their money for a field-wide assessment of sabbatical programs.

...to smaller “five percent” shifts:

- At least one grantmaker added questions about the secondary benefits of sabbaticals into existing program evaluation.

- Another grantmaker chose to incorporate the question of how best to attract and retain “next generation” leaders into an ongoing leadership workshop series.
- Several grantmakers decided to conduct follow-up conversations with leadership development program participants to find out how they take what they learned back into their organizations.

How will lessons learned be shared beyond the action learning group?

While confidentiality is maintained, GEO extracts key lessons and shares them more broadly through our conferences, publications, newsletters and Web site. For example, a GEO newsletter article highlighted lessons learned about sustaining seasoned nonprofit leaders. Lessons from a session on general operating support were incorporated into a GEO print publication on the topic.

How does the action learning process work?

- GEO listens intently to our members to **identify an initial framing question** and then invites a cohort of colleagues who commit to participate. GEO members can also request the creation of a group.
- Participants complete a **brief intake survey** to help GEO understand some of the issues underlying the framing question.
- GEO facilitates **an initial two-hour conference call** to familiarize the group with the process and each other, as well as refine the framing question if necessary.
- Each organization prepares a **short story describing their past experience and lessons learned** related to the framing question.
- Within a month of the initial call, **two-person teams attend a two-day, facilitated retreat** where they share their experience, develop insights and theories of success with their colleagues and leave with action plans to test out over the next few months.
- GEO facilitates a **final two-hour conference call** about 90 days later for participants to report on their progress and share additional lessons learned.
- In many cases, **cohorts have continued to meet** informally.



What topics has GEO covered so far?

Supported by light-touch, but powerful facilitation and focused on a shared “framing question,” GEO’s action learning groups have developed improved practice around such questions as:



Small group discussions allow participants to delve deeply into questions and brainstorm possibilities.

- How can we best support seasoned nonprofit leaders?
- How can we best strengthen synergies between investments in leadership with investments in organizational capacity building?
- How can we best demonstrate the success of general operating support?
- What will it take to best leverage lessons learned from grantmaking “failures”?
- How can we improve evaluation of general operating support?
- What will it take to ensure that our learning practices increase the impact of our grantmaking?

Who has already participated?

- The Annie E. Casey Foundation
- Barr Foundation
- Bill & Melinda Gates Foundation
- Blue Shield of California Foundation
- The California Endowment
- California HealthCare Foundation
- The California Wellness Foundation
- The Cleveland Foundation
- The Colorado Trust
- The David and Lucile Packard Foundation
- The Duke Endowment
- The Durfee Foundation
- Endowment for Health
- Evelyn & Walter Haas, Jr. Fund
- Foellinger Foundation
- Forbes Fund
- Hartford Foundation for Public Giving
- Lumina Foundation for Public Education
- Ontario Trillium Foundation
- The Philadelphia Foundation
- Robert Wood Johnson Foundation
- Saint Luke's Foundation of Cleveland, Ohio
- Sierra Health Foundation
- SVP Seattle
- UJA-Federation of New York
- The Wallace Foundation
- The Whitman Institute
- William Caspar Graustein Fund
- Z. Smith Reynolds Foundation

What have participants said?

“[Unlike many grantmaker convenings], with this group, you go back home... you think about what you already have in your work plan and how you can apply what you learned to what you are already doing... It has been a **great learning experience and a practical one that we are applying to our work.**”



Grantmakers have the opportunity to learn from each other.

“[Our] program was good but it wasn't working exactly right... Like a doctor I was able to diagnose some of the ailments in this program and fix them. **It helped to have more minds and experience to diagnose the program.**”

“It's like group consultation, not a workshop. **Working one-on-one with a consultant would not have been as effective.**”

“If I left right now [half-way through], I'd have gotten my money and time's worth. **Hearing how other experienced grantmakers are tackling this issue is incredibly helpful.**”

“**It was beneficial that two of us from same organization**

attended. It gave us an opportunity to talk through ideas and have the same language and experience to build off of when we returned.”

“**There is no other way we could have accomplished all that we did** without the benefit of a cadre of such smart colleagues—and in such a short amount of time.”

How do I identify the right action learning group for my organization?

Key to the success of an action learning group is having the right people in the room. We have found that the most successful learning experiences include participants who:

- have past experience addressing the issue;
- are deeply committed to improving their practice;
- have an urgent need to address the framing question;
- go through the process with a colleague, as part of a two-person team; and
- have authority to implement their action plans.

How do I select the right framing question?

A framing question starts with “What would it take to...?” or “How can we best...?” Effective framing questions are simple, avoid assuming a solution and are future-focused. The framing question defines the focus of the action learning peer group’s work together. Framing questions can be:

- Strategic: “What are the most important community segments we should be focusing on serving?”
- Operational: “How can we streamline our process for reviewing grant proposals?”
- Organizational: “What will it take for our grantmaking strategies to better reflect the communities served by our grantees?”
- Project-oriented: “How can we make sure we achieve our goals in this project?”



For you, it should be a question that you care deeply about, the answer to which is going to make concrete differences in your own grantmaking or in the work of your grantees and has some urgency.

Finding the right question and the right group is often an iterative process — both the question and the group may evolve before the actual meeting. It is also not uncommon for the question to be revised by the group during the session as learning evolves, often becoming more strategic or systemic in perspective.

What would be my investment to participate?

While one or more foundations might consider sponsoring a group, we recommend that this cost be shared equally across participating foundations at \$5,000 each for two-person teams from each organization. If one foundation chooses to provide sponsorship, the total cost to design, convene, support and evaluate an action learning group is \$40,000 (for cohorts of no more than nine organizations; participant travel is excluded).

Under the shared fee model, GEO members who provide general operating support to GEO of \$75,000 or more per year may waive the \$5,000 fee.

What value will I receive?

For this minimal investment (compared to the cost of hiring a consultant), you will make progress on a particular challenge you are facing now with a room full of smart colleagues. GEO’s customized peer learning process identifies the most appropriate cohort members and the urgent framing question faced by members of the group. Benefiting from professional facilitation and on-the-ground experience of your peers, you leave with an organization-specific action plan – all for two to eight times less than you would pay an external consultant and for a far smaller investment of time.

We are happy to put you in touch with specific past participants in order to better understand the value they’ve received from their investment of time and money.

How can I get started?

Contact GEO to start a conversation about the topic you’re interested in exploring: Courtney Bourns, director of programs at Grantmakers for Effective Organizations, can be reached at phone 202.898.0218, fax 202.898.0318 and email actionlearning@geofunders.org. More information about action learning is available on our website www.geofunders.org.