



Frequently Asked Questions: GEO Action Learning Peer Groups for Improved Grantmaking Practice

Why GEO?

Grantmakers for Effective Organizations has learned a great deal about grantmaking practices that lead to improved nonprofit results. However, it is one thing to know change is needed; it's something else entirely to transform that knowledge into improved practice and to make those changes we know are needed.

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. Action learning is 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 has GEO done so far?

Since early 2007, GEO has piloted five different opportunities for small groups of grantmakers to work on discrete problems they are facing. Supported by light-touch, but powerful facilitation and focused on a shared "framing question," each set of peers developed a shared understanding of the issue and identified promising grantmaking practices that they then tested within their own organization. Action learning groups conducted so far have developed improved practice around such questions as:

- 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"?

Past GEO Action Learning Participating Organizations

- The Annie E. Casey Foundation
- Barr Foundation
- Blue Shield of California Foundation
- The California Endowment
- California HealthCare Foundation
- The California Wellness Foundation
- The Cleveland Foundation
- 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
- 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
- Z. Smith Reynolds Foundation

- How can we improve evaluation of general operating support?
- What will it take to ensure that our learning increases the impact of our grantmaking?

What changes have grantmakers made as a result of participating in a GEO action learning group?

In all cases, participants translated what they learned with their peers into action plans specific to their organization. Actions 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.

"We didn't just go away to another meeting. We learned and we did some real work!"

-- GEO Action Learning Participant

...to smaller "five percent" shifts, including:

- 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.

"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."

-- GEO Action Learning Participant

What do grantmakers gain from participating?

Grantmakers go deeper into challenges with a room full of smart, experienced colleagues by sharing lessons from recent efforts. We've heard again and again that this aspect alone has proven to be beneficial to past participants.

But there's much more. 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 then 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.

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

While confidentiality is maintained, GEO will extract key lessons and share 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 are being incorporated into an upcoming

print publication on the topic. In other cases, we will develop more in-depth reports as appropriate.

How do you identify the right action learning group?

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:

- are part of a two-person team;
- are deeply committed to improving their practice;
- have an urgent need to address the framing question;
- have past experience addressing the issue;
- have decision-making authority to implement their action plans.

To cover costs, we need a minimum of seven participating organizations. Action learning groups generally do not exceed nine organizations.

How do you select the right framing question?

The framing question defines the focus of the group's work together. It should be a question that participants care deeply about, the answer to which is going to make concrete differences in their own grantmaking or in the work of their grantees and has some urgency.

Effective framing questions are simple, avoid assuming a solution and are future-focused. The question might be strategic: "What are the most important community segments we should be focusing on serving?" It might be operational: "How can we streamline our process for reviewing grant proposals?" It could be organizational: "What will it take for our grantmaking strategies to better reflect the communities served by our grantees?" Or it might be project-oriented: "How can we make sure we achieve our goals in this project?"

To keep the learning conversation positive, action-oriented and forward-focused (versus retrospective, analytical and fault-finding), a framing question starts with "What would it take to...?" or "How can we best...?"

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.

How does it work?

The basic format of a GEO action learning group is this:

- GEO listens hard to our members to identify an initial framing question and then invites a cohort of colleagues who commit to participate. Sometimes, GEO members come to us and 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 a two-hour conference call of the full group to become familiar with the process, with each other and to refine the framing question if necessary.
- Each organization prepares a short story describing their

"I was very pleased with the subtle way we were able to stay light on our feet and flow in a structured way in productive directions."

-- GEO Action Learning Participant

- 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.

How much does it cost?

For \$5,000 per organization (plus travel costs), each organization may send two-person teams. 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 clarifies 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.

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

-- GEO Action Learning Participant

GEO members who provide general operating support to GEO of \$75,000 or more per year may waive the fee. Participating organizations must be GEO members. More about GEO membership may be found at www.geofunders.org/membership.aspx.

"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."

-- GEO Action Learning Participant

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.

What does it take to start a GEO Action Learning group?

Contact GEO to start a conversation about the topic you're interested in exploring.

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