

How Can We Embrace a Learning for Improvement Mindset?

A priority for grantmakers and our grantees is to create a space to reflect and learn so that our organizations can become more relevant, and more effective in achieving our goals. Learning, and evaluation, that is specifically focused on improvement provides grantmakers and grantees with the information and the perspective we need to better understand both how we're doing in our work and how to get better results. In order to embrace a learning for improvement mindset, funders need to have key conversations with our boards and staff, as well as with grantees and other grantmakers. This piece offers guidance on what those conversations should cover in order to deliver on the promise of learning for improvement and ultimately better results.

While different organizations will have different ideas about what learning means, GEO sees learning as a cycle of asking and answering questions that helps grantmakers and nonprofits improve performance by synthesizing and acting on what is gleaned in order to better address the urgent issues confronting the communities we serve.

Looking through the prism of improvement gives funders and our partners a powerful tool for boosting nonprofit results. It's not about accountability, but instead it's about understanding what is happening on the ground on an ongoing basis and how our efforts can be optimized moving forward.

Learning is supported by effective evaluation practices, inquisitive and reflective organizational cultures, strong leaders dedicated to driving improvement, the willingness to bring key partners into the conversation about what's working and what's not, and a commitment to use data and information to inform decision making and take action.

For more information on this topic, see [*Evaluation in Philanthropy: Perspectives from the Field*](#) (Washington, D.C.: Grantmakers for Effective Organizations and Council on Foundations, 2009).

Dialoguing internally about learning for improvement

Grantmakers who want to build a mindset for learning need to foster internal board and staff discussions about how to strengthen evaluation so that it advances the shared work of everyone involved, including grantees, other grantmakers and partners. These discussions should cover the following key questions:

Are we using evaluation for improvement, or just proof? Evaluation is not solely about tracking the results and the impact of past philanthropic investments. It is also about learning how to do a better job of achieving the grantmaker's goals. Grantmakers are making the connection between evaluation and improvement in a variety of ways. Some are using evaluation and learning as the basis for wholesale changes in grantmaking strategy. Others are investing in real-time monitoring of funded programs to allow for adjustments and course corrections along the way.

Are we looking to evaluation to show contribution, not attribution? Evaluation has often been viewed as a way to render definitive judgments about success and failure. In many instances, however, grantmakers and our grantees aren't necessarily able to make these sorts of judgments. Furthermore, many grants are simply too small to allow grantmakers to attribute results that nonprofits are achieving directly to our investments. Making cause-and-effect evaluations even more difficult is the fact that grantmakers often choose to focus our grantmaking on complex problems that do not lend themselves to easy answers. In these cases, evaluation becomes a way to learn about the range of factors that affect progress on an issue and to consider how a specific intervention may or may not contribute to change.

Are we learning with others, not alone? Evaluation is not solely about measuring (and improving) grantmaker results. It is also about learning how to improve the work of everyone involved in helping to achieve shared goals for social change. This means working alongside grantees to set evaluation measures that will be useful to them as we all seek to learn from ongoing work. It also means providing grantees with better and more tailored support to do evaluation well. By embracing participatory evaluation and building learning communities that involve staff, grantees and community members, grantmakers help ensure that evaluation meets the needs of all the stakeholders in our work.

Are we looking beyond the individual grant? When grantmakers think about evaluation, we often think about evaluating individual grants. We want information about whether a specific grantee or a cluster of grants is delivering its intended results. While this information can be very useful, grantmakers

and our grantees can benefit from broader insights on how we're doing across our portfolios or areas of work. Questions we can ask ourselves include: How well are we performing and serving our grantees and communities? What can we learn by looking across multiple grants that will help our grantees improve? How can we help grantees and other partners avoid reinventing the wheel or repeating mistakes? What insights might grantees generate if they had a cross-portfolio view of our grantmaking? Foundation-level evaluation poses a number of challenges for grantmakers, but it can be enormously helpful in clarifying the mission, goals and objectives of the organization and in improving operations and overall strategies to better align them with the mission.

Are we learning from failure? Philanthropy can provide the research and development capital that nonprofits need to test new strategies for addressing social problems — strategies that, if successful, could be scaled up and applied by others. But every new strategy or approach can't be a success, no matter how well it is vetted by grantmakers and our partners. The failure of a grantmaking strategy or initiative can produce critical learning that will lead to better results in the future. It is equally important to create a safe space for grantees to discuss failure and mistakes without negative consequences. Using evaluation methods, a grantmaker can put a failed project to good use by capturing lessons about what happened, why the project fell short of expectations, and how the grantmaker and its partners can achieve better results in the future.

Dialoguing with grantees and others funders

Funders who want to build a mindset for learning also need to have key conversations with our grantees, fellow grantmakers and other key partners. It's important to get grantee perspectives on how to leverage the power of evaluation as a core learning practice:

- What do grantees and partners need to know in order to improve their work? How are they learning from failure?
- What do grantees and partners need (e.g., more resources, training, technical assistance) in order to strengthen their capacity to evaluate their work in ways that can contribute to learning and improved performance?
- How will grantees and partners use evaluation findings to support planning and decision making?

Other grantmakers are a great source of ideas and challenges related to the work. Convening them can help funders develop a shared sense of how to work together to advance the practice of evaluation within and among organizations, as well as define shared roles in helping grantees realize the

power of evaluation as a tool for learning and improvement. Key questions to cover with other grantmakers include:

- What are other funders learning from their grantmaking? How do are they learning?
- How are evaluation and other learning practices setup to inform their and their grantees' work?
- What are the areas of overlap or possible learning collaboration among the different funders?

Conclusion

Despite the nonprofit sector's growth, many of the social problems that nonprofits work to resolve have proved difficult, if not impossible, to crack. The nonprofit sector (including grantmakers and our grantees) needs to consider new and improved ways of working, and new and improved strategies for tackling the toughest social problems. A priority for grantmakers is to create a space to reflect and learn so that our organizations, grantees and partners can become more relevant, and more effective in achieving our goals. Learning for improvement provides grantmakers and grantees with the information and the perspective we need to better understand both how we're doing and how to get better results.