

Who is Having Success with Learning?

The David and Lucile Packard Foundation

Grantmaker builds on longtime focus on evaluation by making organizational learning a priority.

Type of funder	Private Foundation
Geography/Issue Area	Los Altos, California
When founded	1964
Total assets (as of FY 2013)	\$6,456,600,000
Annual giving (as of FY 2013)	\$287,735,234
Number of staff	112
Website	www.packard.org
Brief description of the program/ practice being discussed	Experimenting with new approaches to glean lessons from the foundation's work in ways that can improve performance.

1. Describe the situation or practice.

The Packard Foundation is guided in its work by a core set of values passed on by founders David and Lucile Packard. One of these values is a commitment to effectiveness. According to the description of this value on the Packard website, it means that the board and staff “will evaluate their effectiveness and change strategies as necessary to achieve a greater effectiveness.”

Guided by this value, the Packard Foundation has always embraced evaluation as a core element of its work. Recently, Packard set out to couple this longstanding commitment to evaluation with a stronger emphasis on organizational learning under Evaluation and Learning Director Diana Searce, who joined the foundation in 2012.

“I was in a privileged position to come here and to have a lot of infrastructure and good habits already in place, along with a hunger for learning and evaluation,” Searce said. She said her charge has been to ensure that Packard is tapping the power of evaluation and learning to drive strategy across its five program areas: conservation and science; population and reproductive health; children, families and communities; local grantmaking; and organizational effectiveness and philanthropy.

2. What have you tried to do differently?

Since 2012, the Packard Foundation has experimented with a variety of activities, tools and systems aimed at strengthening the ability of the staff and board to capture, make sense of and apply lessons from their work. Examples include:

- **A new platform for managing data about program strategies.** Like many other foundations, Packard invests in considerable research and data collection to track progress on its strategies, such as collecting outcome indicator data. In 2014, the foundation will launch a new tool for collecting, managing and using data related to grantmaking strategies. In practice this will mean, better tracking of outcomes and indicators data, a space for program staff to capture significant changes in their fields and assessments of how they're doing relative to desired outcomes, and the ability to more easily generate reports on progress for foundation management and trustees. The new database will be able to talk with the grantmaker's grants management system to allow up-to-date information about how the foundation's work in various areas has evolved. "This is not a final statement on how we are doing, but the hope is that it will allow us to have conversations that are informed by data," said Searce.
- **A yearly focus on lessons learned in each program.** Traditionally, Packard Foundation program directors have prepared a look back memo for the board at the first board meeting of the year. In 2014, the foundation asked each program to conduct a more holistic review of the past 12 months of work, including successes and failures and lessons learned. The goal was to engage entire program teams, not just directors, in an annual learning conversation with foundation management and other program teams based on their collective insights. Foundation management and some programs found the process to be a valuable opportunity for reflection, while for others it felt like another deliverable. "But the general consensus was this is something we want to encourage, so we will be trying again next year with a few changes," she said. A priority for the second year: adjusting the timing so it is not a crunch and can fit into the natural flow of other work.
- **A foundation-wide learning week.** Another priority at Packard is trying to promote more sharing and learning across program areas. In February 2014, the foundation launched its first ever "Strategy and Learning Week." Staff designed sessions throughout the week to share lessons from their work or to invite colleagues to participate in dialogues about emerging questions or issues that cut across programs. The population and reproductive health team, for example, put together a session on using social media to reach youth, and a half-day session organized by one of the program directors and the vice president of programs explored common themes in staff memos to the board during the prior year. One aspect of the week that helped encourage participation was that it included several shared meals and open-space conversations, and staff were

allowed to dress casual for the week. “People really liked it,” Searce said of the inaugural Learning Week, noting that she sees it as part of a broader effort to “build a culture of curiosity and engagement” at the foundation. However, the foundation is not assuming it will become an annual event. They’re committed to continuing to test demand and if there’s sufficient demand, they’ll deliver a learning experience to meet that demand.

“Learning as a requirement does not work. The question is how to make it something that’s not an add-on or another burden but a natural part of the work. It needs to be something people want to do because it helps them get to where they want to go.”

— Diana Searce, Evaluation and Learning Director

3. What has been the result?

Searce said it is too early to assess the results of the evaluation and learning activities that Packard has recently launched. So stay tuned.

4. What are your key insights from doing the work?

Searce said that encouraging and supporting a foundation wide commitment to evaluation and learning is key. Critical to the success has been the belief in and leadership for organizational learning from the trustees, President and CEO, vice presidents and program directors, she said.

It’s also been important to help people see how learning can help them do their work more efficiently and effectively. “You have to move some of the processes and expectations from something where you check a box to something that produces real value for staff and the foundation,” she said.

That means developing programs and systems that are easy to use and that deliver good, actionable data and information that the staff and board can apply to refine strategies and (hopefully) get better results. It also means building partnership and ownership for the work across the foundation. “My team’s roles have been varied — we’re stewards, champions and in some cases fast followers,” Searce noted.

Making organizational learning stick is easier said than done. The question that keeps her up nights, Searce said, is whether the kinds of learning activities that Packard is experimenting with can contribute to meaningful improvements in the design and execution of programs. “There’s a need to be flexible and adaptive when it comes to organizational learning, and along with that, a willingness to constantly seek feedback and refresh.”