Grantmakers for Effective Organizations presents

Held in partnership with Associated Grant Makers

June 10 – 11, 2015 | Boston, MA
Conference Theme

As grantmakers, we all want to know if our work is making a difference and how it can be improved over time. By not sharing what we are learning, we are not getting what we could out of evaluation because it is done in isolation from grantees, communities and peers.

GEO’s Learning Conference 2015 brought together 300 leaders in philanthropy who recognize that learning in partnership with others leads to better results. The conference explored how grantmakers can learn more collaboratively, ensuring that nonprofits and other partners have the information they need to drive decisions that improve their work.
The Burning Topics I Brought to the Conference

| Culture of Evaluation conversations between nonprofits and foundations – is anyone else doing this work? | What are others doing in relationship to outcomes-based evaluation? Who are the outcomes driven by? |
| Defining “Learning Organizations” – what do different foundations mean by this phrase? | Where does SLHI’s approach to the work fit within a national context of community transformation work? |
| Strategy and efficiency as one person from the foundation working in R&E – how do people organize/prioritize their work? And who from their organization has say in their strategy? | How do other foundations practice continual learning? What difference does it make for developing strategies and determining investments? How do they know it is helpful? |
The Participants I Met Were Itching to Talk About…

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<th>Topic</th>
<th>Details</th>
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<td>How to break barriers and increase transparency between grantees and funders</td>
<td>Transparency – why do it, what difference does it make</td>
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<td>Creating space and time in our work to capacity build within our foundations to better serve grantees</td>
<td>Foundations practicing what they preach as it relates to outcomes-based results – whose doing it, how is it done (org. systems), what difference does it make</td>
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<td>Developing/Identifying consultants recognizing it is impossible to meet the needs of nonprofits</td>
<td>Organizational culture as it relates to learning, meaning making and self-care</td>
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## A New Insight We Can “think about” in Our Grantmaking related to…

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<th>General Operating</th>
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<td>Trust – grantees are our partners, we support their work because we trust they are doing a good job</td>
<td>Our ability to articulate and claim SLHI’s role in building healthy communities will determine how we can contribute to the national conversation and direction of public health grantmaking.</td>
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<td>Nonprofits will never be “sustainable” – nonprofits operate on a model of continued donations and support</td>
<td>Foundations that consistently put time and internal resources into creating their grantmaking frame, as determined by their values (what they stand for) are better able to identify outcomes (to what change they want to contribute). In turn this clarity and declaration allows them to strategically focus their grantmaking investments.</td>
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<td>Programmatic support can sometimes undermine the organization</td>
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Things I Will Do Differently as a Result of the Conference

1. I really want to continue conversations between grantmakers and nonprofits around the culture of evaluation topic. I think there is so much room for learning and growth for both sides and to create a better understanding of challenges and assumptions.

2. I strive to have as much transparency as possible between myself and grantees related to evaluation work. I want to hear about the learnings of the process and not only the outcomes.

3. *Focus on articulating the importance of process learning as it relates to outcomes.

4. *Expand funders learning relationships with each other.
Opening Session: Set Your Learning in Motion

To start the conference in a high-energy way, archiTEXT, a design thinking studio based in Toronto, led participants through a series of three community-building activities designed to get us in the “learning together” mindset:

1. Low Tech Social Network
2. Hear, Do, Change
3. Post the Path

My takeaways:

• An a ha moment…
  • Foundations should focus and share what we LEARNED from our grantmaking not what we DID
  • *Taking what we learned and making meaning of it to inform future action needs to be deliberate
A Partnership Model: Co-designing Evaluation with Grantees

- Healthcare Georgia Foundation has created Georgia Evaluation Resource Center – they give grants for planning evaluations and have a website with “vetted” evaluation consultants around the entire state so that grantees know who they can access in their communities for additional support (ERC website is full of free, downloadable resources)

- Edna McConnell Clark Foundation has partnered with 3 other funders to support youth serving organizations and are working together on one evaluation
Day 1 Plenary: **Coming Together and Getting It Together**

Using The California Endowment’s *Building Healthy Communities* initiative as an example, this session focused on what it truly takes for grantmakers to shape more co-creative, not top-down, planning processes and evaluation and learning activities that are relevant to everyone involved.

**My takeaways:**
- Gut check of foundations’ approaches to initiatives, don’t assume funders know better, need community support and input for an initiative to “take root”
- Not evaluating but assessing what is going on with the work
- Partners rather than grantees
- Rethinking investment areas – can’t just support “health in the community” – education, job training, transportation, etc. all impact health. Need to be more holistic
- *Better articulate and identify what we mean by outcomes-based results – for who, determined by who*
Fail Fest

In seeking to create positive change in communities, we rarely experience totally smooth sailing. We have all flopped at something, and sometimes our best intentions and seemingly good ideas just don’t yield desired or expected results. There is universal recognition of the importance of learning from our failures, and Fail Fest gave participants an opportunity to do so.

Discussion questions:

• Do we give ourselves, our grantees and our colleagues permission to experiment, fail, talk about why things got off track and try again?

• How could we create a regular forum for staff and grantees to discuss and learn from failure?
Fail Fest Highlights

Soundtrack:
You’re So Vain (Carly Simon),
Nobody Knows the Trouble I’ve Seen (Louis Armstrong),
For the Love of Money (The O’Jays)

• **Precious Snowflake Syndrome** – the foundation was divinely created and I have this job because I am so divine…We are all suffering from Philanthropic Exceptionalism

• **Money cannot fix everything** – a nonprofit leader said she looked up to see a freight train of Christmas presents coming straight at her and she didn’t want any of them

• **We are never smarter than our grantmakers**
Breakouts Round B

Growing Your Organization’s Ability to Open Source Social Change

• Communities can come together to talk about “how” you do certain work with acknowledging similar challenges
• Organization builds in time and space for reflection and learning of their work
• Before action review – emergent learning 4 questions
• Share learnings from grants, conferences, collaborations, etc. in the form of live blogs by staff members and an internal interactive site
• Trust staff as representatives of organization when they communicate externally
Short Talks

Round 1
• **Andrew Means**, *The Impact Lab*

Compared foundations to investors buying stocks based only on price tickers – don’t know the real value of what you’re investing in

Applied computer science with social science
Causal vs. predictive questions, best-practices are not predictions and best-practices don’t work because the population is different each time.

*Asking decision point questions: what information would help you make that decision?*
Closing Plenary: Learning Together to Build Community Knowledge and a Public Voice

Ceasar McDowell, president of Interaction Institute for Social Change and a professor at MIT, closed the conference with a reminder that the ultimate purpose of learning together is ensuring that everyone in a community, especially those traditionally excluded, can voice and act on the issues that impact their lives.

He offered shifts — both large and small — grantmakers can make to generate community knowledge and shared understanding. He described efforts happening in Boston where broad groups of people voice their ideas and visions for the future.
Learning Together
Actionable Approaches for Grantmakers

“The ultimate focus of learning… should be, ‘What knowledge and expertise can we draw on to solve this problem, and how can we bring people together to make sure we are all working from a unified understanding of the problem and its solutions?’”

~ Joe Dickman, deputy director for research, evaluation and learning, The MasterCard Foundation

Download the publication here
Learning Together
Three Big Questions

1. WHAT do we want to learn together – and WHY?

2. What are the core VALUES and PRINCIPLES we should keep in mind to help ensure the success of shared learning?

3. What are they KEY STEPS to making shared learning work?
Additional Resources

• Social media: https://twitter.com/GEOfunders and #GEOLearn

• Conference website: bit.ly/geolearn or http://www.geofunders.org/events/geolearn (includes session descriptions and links to speakers’ handouts and bios; plenary session and short talk videos coming soon)

• GMNsight on-going co-published blog series: http://www.gmnsight.org/learning-and-evaluation-a-conversation/

• GEO’s Smarter Grantmaking Playbook: http://www.geofunders.org/smarter-grantmaking/learn-for-improvement