

BUILDING AN INTERNAL LEARNING CULTURE IN A FOUNDATION

Leann Caudill, Kauffman Foundation Intern

August 2019

KEY INSIGHTS FROM FOUNDATION INTERVIEWS

| Take a breath - this is all still new.

Most foundations are early in their journeys on building a learning culture and recognize that building strategic learning systems will take time.

| There are a small number of learning activities that most foundations use.

These tools include before- and after-action reviews, what / so what / now what, emergent learning tables, and data galleries.

| Strategy cycles can serve as an important hook for learning.

The strategy cycle process creates an important opportunity for program staff to stop, reflect, and develop key lessons that can inform their work moving forward.

| The larger the group, the more difficult it is to learn.

Foundations find it easier to foster learning within teams, and much more difficult to do so across the organization as a whole.

| Culture eats strategy for breakfast.

A strategic learning system will only be as effective as the organizational culture that supports it. Focus on culture at least as much as the tools and processes to be implemented.

KEY INSIGHTS FROM THE LITERATURE REVIEW

Building a learning culture requires a holistic strategy.

Learning needs to be built into the structure of the organization, including core processes and policies, systems, cultural values, and the routine work of staff.

Reflection, reflection, reflection.

Staff need both time and space to reflect – on data, evidence, and experiences – in ways that lead to the creation of meaningful insights and lessons that can drive decision-making. In addition, reflection is more likely to provide value when it is done through structured, facilitated engagements.

Rather than creating new processes, strive to embed learning into those that already exist.

Staff are less likely to adopt new tools or tasks that are simply added on top of their existing workload. Instead, embedding learning tools greatly increases the likelihood of adoption across the organization.

For example, setting aside part of a regularly scheduled team meeting for a learning activity; including a learning goal as part of performance reviews; or building evaluation skills through all-staff gatherings like a Lunch and Learn.

Leverage small teams (or small groups within teams) to share knowledge.

Learning often requires vulnerability and trust, which is easier to build in smaller groups.

Target audiences when sharing lessons.

Adult learning principles suggest that staff pay more attention to lessons that directly apply to their work. If staff are consistently hearing lessons that they do not see as directly relating to them, they are more likely to disengage from the learning process.

Develop a system for managing the organization's knowledge.

Organizations need a way to capture and record past and current knowledge and a process of dissemination to share lessons with others.

RECOMMENDATIONS

1. Look for ways to **embed** a learning strategy into existing processes and structures at your foundation.

Reflection and learning are often deprioritized when more seemingly urgent matters come up. By building learning tools into the foundation's existing workflow, staff are more likely to spend time on reflection and learning.

- **Human Resources:** Incorporate a learning component into the hiring, onboarding, goal setting, and performance review systems.
- **Communications:** Develop internal communication systems that make it easier for staff to share with each other. Create channels to consistently share lessons externally with the field.
- **Grants management:** Incorporate learning into the grantmaking process, both at the application stage (what are the key hypotheses being tested?) and at the end of the grant period (what did we learn from the results achieved?).
- **Evaluation:** Prioritize producing actionable and relevant evidence that staff can use to inform key decisions about strategies, programs, and grants.

2. Develop a robust **lifecycle** for your strategies and build in an explicit learning component.

In addition to an annual review process, develop a broader strategy lifecycle with a planned refresh or rebuild every 3-7 years. Use this cycle to set clear expectations around when program staff will develop lessons, draw insights, and make adjustments to their strategies.

3. Build and maintain a culture that acknowledges **failure** and promotes **continuous improvement**.

Foundations typically invest in areas that have seen persistent challenges for decades – education, health care, poverty – which means failure will likely be a common outcome. Creating a culture that provides safe spaces for vulnerability and trust is a prerequisite to meaningful reflection and learning. Introducing a [Fail Festival](#) or [Worst Grant Contest](#) can help staff internalize those values faster.

4. Take steps toward developing a **knowledge management** system.

While a truly comprehensive knowledge management system might seem impossible, consider developing a more manageable system that allows staff to see previous lessons and creates opportunities to learn from others, especially those outside their program or strategy.

ADDITIONAL RESOURCES

Facilitating Intentional Group Learning, FSG

A “how-to” guide for 21 different facilitation techniques that drive learning. [VIEW](#)

Growing Knowledge Together, Fourth Quadrant Partners

The theory and practice behind the Emergent Learning Table (previously Emergent Learning Map). [VIEW](#)

Learning in Philanthropy: A guidebook, GEO

An overview of what learning can and should look like within foundations. [VIEW](#)

Learning in the thick of it, Harvard Business Review

A short piece on how to best use before- and after-action reviews. [VIEW](#)

Strategic Learning in Practice, Foundation Review

A special issue on how foundations are approaching strategic learning. [VIEW](#)