

Achieving Greater Impact by Starting with Learning

How grantmakers can enable learning relationships at the grant application stage
Executive summary

When grantmakers ask the organizations they fund about their evaluation plans, they are typically motivated by a desire to achieve the greatest impact possible through their investment. They often hope to help the organizations they fund to do the same. However, these conversations sometimes veer off track, especially when nonprofits feel pressure to produce evaluation results that align with funders' preconceived ideas. Evaluation can turn into a tool for accountability and risk management rather than a tool for learning. One way to prevent this dynamic from developing is to make sure that grantmakers and grant recipients talk with one another about *why* they are interested in evaluating a particular project before they get into discussions of *what* should be measured and *how* data collection tools should be used.

This work explores strategies that grantmakers can use to lay the groundwork for meaningful evaluation by **focusing on learning rather than measurement** early in the grant application process.

The full report is available at www.theonn.ca/evaluation



Why organizational learning is important

Organizational learning is a hallmark of flexible, responsive, and impactful organizations – whether they are grantmakers or nonprofits. Although informal feedback and adaptation goes on all the time, few organizations actively plan for learning or make time to ensure that it takes place in thoughtful, useful ways.

While many grantmakers recognize that the measurement of outcomes requires specialized expertise and dedicated resources, they don't always acknowledge that the same is true for the work of learning from evaluation.

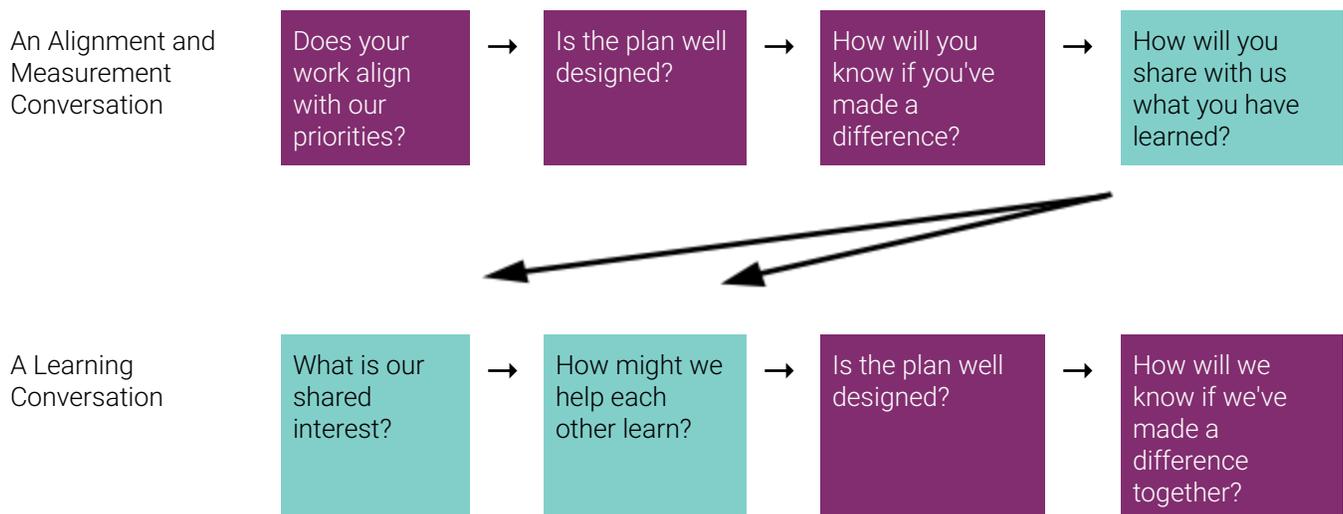
Why the grant application process is central to learning for grantmakers

For grantmakers who want to focus on shared learning, the grant application stage offers a first opportunity to learn from their potential grant recipients about the work they do, the issues in their community as they hear them, and the culture of their organization.

Beginning this process may mean unlearning old habits about the role of measurement and evaluation. In traditional grant application processes, measurement is often discussed, but questions tend to focus on accountability and risk management. Often, discussions revolve around ensuring program sustainability, clarifying how money will be spent, and what will be measured. While these may be important topics to discuss, they are not questions that set the stage for learning. This traditional approach in turn helps to shape the narrative and signals to nonprofits that learning is low on the priority list – if on it at all.

Cultivating a culture focused on learning together requires good research and evaluation skills, but it also requires skill in facilitation, knowledge mobilization, partnership development, and collaborative planning. This may be one of the reason why the increase in measurement work by grantmakers hasn't always translated into a better understanding of impact.

MOVING LEARNING TO THE BEGINNING OF THE CONVERSATION WITH A GRANT RECIPIENT



Elements of learning organizations

One key element of learning organizations is that **learning is intentional**. It requires mindful attention to what is (or is not) being learned and the barriers to learning. It also requires putting in place actions or policies to better enable learning, leadership, and buy-in from staff. **Learning also happens in interaction**, particularly when that interaction includes people from outside one's own team. Interacting directly with people with different experiences and points of view is likely to lead to new insights more quickly than talking only with one's coworkers *about* people and issues in the broader community.

Key insights about the elements of learning organizations

- **Learning is a habit.** Organizations build a focus on learning into their routine practices. They consciously invite and reward learning
- **Learning goals are clear.** Organizations know what they want to learn and why that is important
- **Deep questions get asked.** Organizations ask questions about their values and assumptions, not just questions about program tactics
- **The organization is ready to act on what it learns.** Organizations are prepared for the implications of what they learn. They are willing and able to alter their practices
- **Learning is inclusive and engages partners.** Organizations engage their external partners in the learning process
- **Leadership drives organizational learning.** Executive directors, CEOs, presidents, and senior managers play an important role in leading by example and in creating space and encouraging learning in others

Principles to guide the development of a learning relationship

- **Model a culture of learning.** As a grantmaker, demonstrate your commitment to learning from the communications process with applicants by sharing information on your own learning culture
- **Learn in partnership.** Learning requires reaching outside one's comfort zone and listening to others. It requires developing a different kind of relationship with grant recipients
- **Understand an applicant's approach to learning.** Organizations learn in a wide range of ways. Their capacity to learn may be inhibited by a range of external factors and their approach may change over time as they grow
- **Plan for learning.** Identify up front what each party hopes to learn, but also acknowledge that learning is, by nature, iterative and can include unexpected results. This can set the stage for more honest conversations going forward, help form trust between the parties, and clarify alignment
- **Reward learning.** Make it clear from the beginning that a commitment to learning will be valued in the decision making process and in managing the grant on an ongoing basis. This can also help to reduce the reporting burden on potential and future grant recipients and encourage discussion of what really matters
- **Balance flexibility and fairness.** Since culture is a dynamic phenomenon and learning often arises in unexpected ways, the process of interaction and reporting will need to be adjustable to make sense for the conditions and context that each grant recipient is operating under. Cultivating a learning culture necessarily involves surrendering some control over the process and

acknowledging mistakes. It is important that all stakeholders are comfortable with this shift and that they are supported to manage it

LEARNING QUESTIONS VS MEASUREMENT QUESTIONS IN A GRANT APPLICATION

Learning-oriented questions	Outcomes and measurement-oriented questions
Why are you proposing this project? What are some of your organization's learning goals?	Before > What are your outcome objectives?
Why do you see us as a good partner? How can we help each other learn?	Before > How do you align with our investment priorities?
What do you hope to learn? How will you make use of evidence when making decisions?	Before > What are your evaluation questions?
What do you expect to be the challenges? How will you know if you are on track? What would count as success?	Before > What are your benchmarks or targets?
How often do staff meet to talk or reflect on project/program progress? In what ways does your organization document and share information?	Before > What indicators and methods will you use?

In grant applications that prioritize typical evaluation questions such as those in teal in the diagram above, this can lead to nonprofits interpreting that what matters most is being able to answer questions focused on measurement and accountability. Instead, shifting the focus to prioritize learning questions can help to change the conversation to one that is more open, fluid, and potentially more honest.

Final thoughts: Start the conversation with learning

Grantmakers seeking to leverage their assets to make progress on large-scale issues such as human rights, poverty, or climate change rely on the nonprofits they fund to get the work done on the ground. But it is often difficult to really understand who these nonprofits are, how they work, and whether they share the same goals. The grant application stage has traditionally been the place to try to begin to get answers to these questions. At the same time, the grant application stage can be prone to asking questions that in fact focus more on accountability or are simply not appropriate at this point in time. As a result, the relationship starts down a road that may not enable honest conversations, trust, or understanding.

In some respects, there will always be a certain intangible feeling towards learning. As such, grantmakers need a variety of strategies to gathering information about learning organizations as well as internal understanding of how their own learning cultures inform their decision making. Most importantly, grantmakers will need to approach their relationship with their grant recipients different way if they are interested in truly learning and sharing with them. It may require getting out of comfort zones and being

flexible in the practices and policies that are employed. Using the grant application process is therefore crucially important to starting that reciprocal learning relationship.