

# Learnphilanthropy

**LearnPhilanthropy Symposium**  
**Chicago, Illinois, July 28/29, 2010**

**A Set of FAQ's for the *LearnPhilanthropy* Symposium:**

## **1. What is the *LearnPhilanthropy* Initiative?**

LearnPhilanthropy is an ambitious effort to build a better and more collaborative system of grantmaker learning -- one that is field wide, that serves grantmakers in all their various roles better, that works for providers, and that helps to strengthen the culture of learning in our field. It's a bold idea. But we think the time may be right -- for new thinking and for concrete forward action.

## **2. Where did it come from?**

The Council and Forum took a critical first step together -- as part of their Strategic Alliance -- and named an Education Design Team in 2008 to explore the idea of creating a more coordinated system, that could be owned and built by the field. This action built on extensive earlier work by the Forum's Education Task Force, a Hewlett Foundation-funded effort which had garnered broad stakeholder involvement around the development of an education framework. The Bill and Melinda Gates Foundation then came in, with critical support that allowed what was then called the Grantmaker Education Initiative to step up to its current level, with four working groups, the ***LearnPhilanthropy.net*** web site, and the Symposium in Chicago. The initiative has now been renamed ***LearnPhilanthropy***.

## **3. How does the *LearnPhilanthropy* Symposium fit in?**

The Symposium is an inflection point -- neither the beginning nor the end of the effort. We look to it to test some of the ideas the working groups have developed, to make them better, to develop new ideas, to start to map out possible solutions for some of the inevitable roadblocks, and to define concrete action steps. At the end we hope to have critical mass of people who say -- "this is important, here's where we need to go, and here is how my organization can help make it happen".

## **4. Who is on the *LearnPhilanthropy* leadership team that has planned the Symposium?**

Members of the team are: **Jessica Bearman**, Bearman Consulting; **Courtney Bourns**, Grantmakers for Effective Organizations; **Dave Campbell**, The McGregor Fund, (Co-Chair); **Barbara Demarest**, Independent Consultant; **Allen Gunn**, Aspiration Inc.; **Kristin Lindsey**, Council on Foundations; **Michael Litz**, Forum of Regional Associations of Grantmakers; **Dara Major**, Independent Consultant; **Karen McNeill Miller**, Kate B. Reynolds Charitable Trust; **Rachel Mosher-Williams**, Council on Foundations; **Vicki Rosenberg**, Council of Michigan Foundations; **Marcia Sharp**, Millennium Communications Group; **Joyce White**, Grantmakers of Oregon and Southwest Washington (Co-Chair).

## **5. What are the specific goals of the Symposium?**

- Co-create a compelling vision of a collaborative and field-wide system for grantmaker education and learning
- Define a plausible path and series of next action steps for achieving this vision
- Identify and get input on specific decisions that will need to be made going forward
- Expand the network of people and organizations working together to build the system

**6. Who is coming to the Symposium?**

We have registered 75 people, from foundations, affinity groups, regional associations, national organizations, academic centers, consulting firms and technology projects. They come in the interests of their own organizations -- and in the interest of enhancing the possibilities and practice around learning in our field.

**7. What kind of a meeting will this be and what do you mean by “co-creation?”**

From the beginning, we've approached this project from the perspective of building a collaborative network that will, in turn, create the system that meets its needs. We're bringing in data and analysis from the workgroups. But we do not have any preconceived answers to put in front of you. So what we mean by “co-creation” is that we will work together to visualize a more powerful system for learning in our field -- and then begin to lay out action steps to achieve it. Expect lots of small group work. Expect “visioning” that aims at building plausible solutions to real problems. Expect some negotiation -- e.g., “if we did it this way, I could support it.” Expect outcomes.

**8. What are the expectations, if any, for my involvement, or my organization's involvement, in LearnPhilanthropy after the Symposium?**

We're very open in stating that we're looking for support and action. We hope that many people and organizations will want to get behind the work to build this system, and will step forward in specific ways to be part of the action. We've developed a potential list of ways that interested players can take action after the Symposium -- and we hope the group will come up with more. We also know that not everyone will sign on, and that some who eventually take a role will not be able to decide on the spot.

**9. Assume the outcome of the Symposium is good. Are there resources in place to continue?**

Yes. With the support of funders who have already stepped forward or expressed interest, the Council and the Forum -- who have incubated this so far -- are able to continue to sustain the work through a 4-6 month phase 2 incubation period. This is at a base level; additional support would permit faster and broader progress on the action steps. Forum and Council are also actively seeking additional phase 2 leadership partners, to join the **LearnPhilanthropy** Steering Committee.

**10. What is the short and long term vision for who owns and leads LearnPhilanthropy?**

The vision for the initiative has always been to build a system that would be created by the field and owned by the field. The initiative is guided and managed now by a Steering Committee of five people -- a foundation CEO, a regional association executive director, a senior staff leader from the Council and one from the Forum, and a lead consultant who is independent of all those organizations. For this next planning phase after the Symposium -- which we imagine as 4-6 months -- we are looking for 2-3 additional members of the Steering Committee who can bring different organizational perspectives, and contribute to the work of shaping this on behalf of the field. Developing a long term plan for governance is one of the priority tasks in a next phase.

**11. What mechanism is there to involve a wider set of people than those coming to the Symposium?**

**LearnPhilanthropy.net** is the platform for spearheading wide engagement from leaders and practitioners in philanthropy around the issue of grantmaker learning and professional development. We are posting and continuously updating information about the initiative, inviting ideas from the field, and seeking input at all stages of the work. We will be blogging from the Symposium, to give interested people outside a window into the deliberations, and we are committed to establishing a collaborative learning community -- with plenty of space for the ideas and wisdom of the field.

## USER NEEDS WORKING GROUP -- HIGHLIGHTS

*Charge and Leadership: To develop an informed assessment of the educational and learning needs and aspirations of the users of grantmaker education and learning. Chair: Karen McNeil Miller, President, Kate B. Reynolds Charitable Trust. Consultant: Barbara Demarest*

This group was asked to develop information about the learning needs, opportunities, and gaps in grantmaker education and learning, from the user perspective and with a focus on staff in foundations. The group developed two survey instruments, one put in the field by Peter Hart Associates, and one offered on LearnPhilanthropy.net. The surveys explored how decisions are made in foundations about professional development; what levels of spending occur, per person; where people currently get their learning; their needs and interests in further learning, and what aspirations, interests and expectations they would have with respect to a system for grantmaker learning. The two surveys combined reached more than 600 individuals, including about 110 CEO's. The experience base was about half foundations with assets over \$100 million, half with assets under \$100 million.

### GROUP OUTPUTS:

#### Developed survey findings, including these top points:

- 63% of all respondents said no one in their foundations was tasked with professional development.
- About half of all participants estimated their foundations spent at least \$2000 a year on their professional development.
- Half reported that they went to four or more learning events a year.
- Most likely providers/sources of professional development are:
  - self-directed learning: 75%
  - affinity groups 54%
  - national grantmaker associations: 53%
  - regional/local grantmaker associations: 48 %
- Learning opportunities involving networking and sharing among peers, and strengthening general management and leadership issues are the most sought after.
- Fewer than 50% of the respondees say they have good access to high quality learning opportunities in their areas of most interest. The percentage are even lower for respondees with fewer than ten years in philanthropy.
- Percentages of respondees who say they are highly interested (8 or above on a 10-point scale) in the following features of a possible grantmaker education system:
  - digital library of downloadable tools and documents connected to specific learning needs 69%
  - information about and links to learning and networking activities, including courses, conferences, workshops and seminars, both live and on-line 64%
  - descriptions of the courses and learning activities needed for specific grantmaking jobs and functions 56%
  - topic specific resources and reading lists (for example, the arts, environment, health care 50%
- Newer entrant respondees (in the field fewer than ten years) showed higher interest in more formats and more "features" of a possible system than colleagues with more than 10 years -- e.g. place for posting questions, course creation and publishing tools, a jobs board, a system for matching mentors and mentees.

## **Offered additional perspectives to shape system**

### **Perspective 1: Factors inside foundations that will influence, and likely increase, demand for grantmaker learning:**

- *Individuals have a clearer idea of how decisions are made about professional development – both in their own organization and across the field as a whole.*
- *Individuals know who is usually responsible for grantmaker education and professional development and what role that person plays in their organizations.*
- *Individuals have a sense of what the various career paths are for them as philanthropy professionals.*

### **Perspective 2: In categorizing users and their needs, user behavior will be more important than user demographics.**

A self-identified “learner” may be a novice in one context and an expert in another. Or may be in need of role definition one day and ready to give advice about organizational design the next. Workgroup believes the user needs an extremely flexible and well-catalogued system that focuses much less on demographics, role or type of organization, and much more on organizing and tagging content in myriad ways that make learning accessible.

### **Perspective 3: It is more important to respond to the existing market need than to build a new market.**

Group believes there is a user need for a field-wide grantmaker education system and that the Grantmaker Education Initiative should be responsive to that need. Cautions against an “if we build it, they will come” mentality and encourages iterative, rapid prototyping over elaborate planning and major constructing. Group also encourages user participation in shaping and evolving the Grantmaker Education Initiative.

### **Perspective 4: Networking and “Working Wikily” is key to building an effective field-wide system.**

Group was greatly influenced by the idea that users need a field-wide collaborative network as opposed to a static catalogue of learning offerings. Approaching this project as a network building project creates a frame that differs from a product/service development project. The group would like to prioritize this particular conclusion, as it sets the tone and approach for the entire undertaking.

### **Perspective 5: Users will expect some level of quality control.**

Group believes that users need an open and accessible system, but also believes that users will need some form of quality assurance in the offerings available via a field-wide system. There are several ways to accomplish this, including some suggestions by the group:

- Users have the ability to review and rank learning offerings (like Amazon or Yelp!).
- Sponsors of the field-wide system maintain some minimum criteria that must be met before an offering can be included in a field-wide system.
- Users have access to information about the organizations that will be providing and distributing learner offerings via a field-wide system.

## KNOWLEDGE AND CONTENT WORKING GROUP -- HIGHLIGHTS

*Charge and Leadership: To identify and prioritize the audience segments for grantmaker education, define the core knowledge needs of each segment, and map what education and knowledge currently exists. Chair: Vicki Rosenberg, Vice President, Education, Communications and External Relations, Council of Michigan Foundations. Consultant: Dara Major*

### GROUP OUTPUTS:

#### Articulated Starting Assumptions

- 1) *the purpose of a grantmaker education system is to increase the effectiveness and impact of philanthropy.*
- 2) *intentional, better-coordinated learning as a field is essential to supporting increased effectiveness.* Linking learners together to provide and acquire knowledge, products and services would produce positive network effects in addition to extending the reach, rate of experimentation, adoption and results of learning.
- 3) *the field is at an inflection point.* Today, philanthropy as a field of practice seems to have developed – as a result of expansion, regulation, diversification and the establishment of a robust infrastructure – a new state of readiness to collaboratively identify, manage and leverage these and other critical learning opportunities in order to achieve mission-driven results.

**Scanned the sector** for existing, high-quality learning frameworks that illustrate a range of perspectives on roles and competencies in a variety of operating contexts. Frameworks investigated include those from: Forum of Regional Associations of Grantmakers, Grantcraft, Boston College Center for Corporate Citizenship, Social Venture Partners Seattle, Council of Michigan Foundations (Philanthropy 3-D), CF Leads, Center for Venture Philanthropy, Foundation Strategies Group, Global Independent Investing Network and Philanthropy for Social Justice Working Group. Noted that most grantmakers work within multiple frameworks.

#### Suggested audiences for the grantmaker education system

Most likely early stage participants: 1) current providers of formal learning and education programs for grantmakers; 2) staff and trustees of the 4,600 foundations that employ staff; and 3) donors and trustees of the approximately 6000 unstaffed foundations that are current members of one or more philanthropy infrastructure organization. However, group believes this system can and should provide pathways to entry for *all* grantmakers including, for example, participants in giving circles, social investors, and trustees managing multiple trusts.

**Noted that learners further segment, and often self-select,** along the following dimensions:

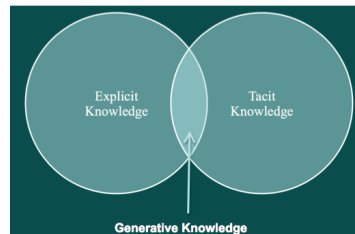
- Role and responsibilities within the foundation or grantmaking organization;
- Mission, goals, culture including: issue focus; geography; overall strategic approach; strategy components;
- Organization type and asset size;
- Level of experience within and outside of the philanthropic context.

**Urged broader focus than individual learning** While individual-level learning is important, successful action often springs from awareness and understanding at the organizational and field levels. Group believes it is important to structure specific, focused learning opportunities for the priority and general audience that relate to individual needs but are organized around collaborative problem solving at all three levels.



### Defined three kinds of knowledge that are critical to the field

Grantmakers at all levels of experience draw on two kinds of knowledge – explicit and tacit – that are in constant interaction and are continually replenished through action-oriented, reflective practice.



- *Explicit knowledge.* Understanding essential practices: codified tools, products. Profession.
- *Tacit knowledge.* Learning by doing: intelligent experimentation, insights, experiences. Craft.
- *Generative knowledge.* Transforming internally: Adapt, refine, innovate. Reflective practice.

Grantmakers learn in formal and informal settings from a variety of sources including peers, regional associations, affinity groups, universities, advisory firms, and consultants. Yet learning is often atomized as a discrete, one-time event for solo practitioners. While this may support explicit and tacit knowledge transfer, the application and adaptation of generative knowledge seems to happen best through reflective peer learning in ongoing communities of practice. Further, in an organizational context, intentional organizational-level approaches are key to prioritizing learning that results in improved practice.

### Made these recommendations for a grantmaker learning system

As a field, philanthropy has reached an important juncture: a critical mass of core offerings is now enabling grantmakers and providers of all kinds to more readily see where they “fit” in relation to current learning and peer practices. More fully documenting the range of activities via this system would in itself yield interesting data and multiple perspectives on strengths, weaknesses and opportunities for strengthening field-level learning. The group believes a grantmaker education system should:

- Structure specific, focused learning opportunities that relate to individual needs but are organized around collaborative problem solving at the individual, organizational and field levels;
- Identify additional models as well as commonalities across existing knowledge frameworks – and explore ways to enable grantmakers to align and/or generate custom frameworks.
- Facilitate the development of tools that enable learners to set, chart and share their learning paths to foster continuous learning at all three levels: individual, organization and field. This should include staff with line responsibility for staff development and or organizational learning.
- Offer a comprehensive range of information and instructional methods, depending on the content and facilitator expertise needed, from program calendars/bulletin boards to traditional workshop settings to webinars and other distance learning tools.
- Prioritize in-person engagement and embrace technology and on-line learning environments;
- Support the comprehensive documentation of the range of available offerings, activities and gaps;
- Ensure assessment practices are embedded in its infrastructure to validate the quality of the system by collecting and analyzing practitioner feedback, and by implementing evaluation practices that track relationship to practice effectiveness over time;
- Go beyond “grantmaker education” to coordinate learning among providers, academic researchers, other practitioners and grantees;
- Utilize information analytics to develop and inform a research agenda focused on field-level learning.

## **BUSINESS MODELING WORKING GROUP -- HIGHLIGHTS**

*Charge and Leadership: To map the current marketplace for grantmaker education from the lens of financial sustainability, and develop scenarios that could address the lack of sustainability in the market. Chair: Courtney Bourns, Director of Programs, Grantmakers for Effective Organizations. Consultant: Jessica Bearman*

The Business Modeling working group has been responsible for investigating the provider side of the marketplace for grantmaker education and starting the thinking about a sustainable business model for a grantmaker education system. The team has deferred actual business modeling until more is known about the target customers for any system, and the needs, interests and price sensitivity of those users.

### **GROUP OUTPUTS:**

#### **Articulated these assumptions with significant implications for business viability**

1. A culture shift is required. Financial viability of grantmaker education requires, in part, a *shift in ethos* from current beliefs that:
  - There's no profession - every grantmaking organization is its own unique thing
  - Effective, professional grantmaking does not require ongoing professional education
  - Money spent beyond the immediate task of grantmaking is not serving funders' highest purpose
  - Grantmaking is an art that can't really be taught – or at least doesn't much benefit from systematic learning
2. Shifting this culture will require significant investment in social marketing. The LearnPhilanthropy system must include an intentional effort to change the way grantmakers think about the value of professional learning.
3. System must benefit providers. A workable system for grantmaker education will need to elevate individual brands and be seen as – overall – adding value to individual organizations rather than detracting from them. It will need to respond to concerns from membership organizations that open access to knowledge resources could diminish their value in the eyes of their members.

#### **Defined the primary users of a grantmaker education system**

1. Grantmakers (staff, trustees, volunteers) with learning needs – and, from an institutional perspective, foundations and grantmaking entities with interest in professional development.
2. Grantmakers with content and knowledge (tacit and explicit) to share – would use the system to share their own products, including reports, toolkits (such as TCE's diversity toolkit), methodologies (such as WKKF's logic model resources), etc. They would also participate as learners and sources of knowledge on list-servs, communities of practices, discussion boards, etc.
3. Content providers who will promote and sell "wares," -- processes, exchanges, experiences, etc. -- via a system, seeking to reach a larger audience of grantmakers with their resources.
4. Content distributors who can select content from a wholesale market to offer via their "boutique" operation.

#### **Developed a nuanced understanding of the provider side of the marketplace**

The group segmented *provider stakeholders* into five overlapping categories, noting that their needs and interests vary, and that any system will need recognize the differences and offer appropriate incentives.

1. Content creators: Organizations that promote and sell specialized content, including materials, research services and reports, internal learning processes, and experiences to colleagues who then disseminate it and/or directly to grantmakers.

2. Content producers & providers: Organizations that both create their own content and disseminate or host content from others. Like a regional national public radio station, these organizations produce and adapt unique content that is mainly of interest to their region or interest audience. They may produce content that would have a wider – national or international – audience. And they also purchase content from colleague organizations across philanthropy and beyond.
3. Content curators: Organizations that select and purchase content from other organizations and package it for their members or constituents. These organizations may customize the content for their particular audience or region.
4. Content syndicators: Organizations that identify and acquire content from other organizations and distribute it widely, providing an organizing and synthesizing function.
5. Learning facilitators: Content providers in all categories may also facilitate philanthropy learning by providing spaces for grantmakers, donors, and others to share and gain tacit knowledge. These spaces can take the form of informal networking opportunities at conferences, workshops, list-serves, peer learning networks, and communities of practice.

### **Surveyed providers to develop an understanding of provider behavior and priorities**

Group conducted a small survey of philanthropy content creators and providers (29 distinct philanthropy support organizations responded) to develop initial data about how the system works now. Four key points:

1. **The current “system” of grantmaker education is characterized by individually priced and offered content and experiences, developed based largely on each provider’s individual understanding of the interests and needs of its constituents.** Of the survey respondents, 70% expressed that “ear to the ground” or informal conversations with members or constituents was a primary mechanism for deciding what to produce or offer in any given year. In contrast, only 20% said that they analyzed what was available from other content providers when deciding what to create or offer next and only 10% responded that a codified framework of any sort factored into their decision-making process.
2. **Philanthropy support groups cover their costs for content creation and dissemination in a variety of ways, relying heavily on member dues and supplemental grant funding.** Many membership organizations build some or all of the costs for programming into their membership dues structures or pull from general operating funds and charge nothing or very little. A few develop pricing structures that cover all or some of the true costs of developing and disseminating knowledge. Between these extremes are the many organizations that offset content creation and/or dissemination through a combination of membership dues, program-specific sponsorships and restricted grants, and fees that cover some portion of additional expenses. *Most funding for the research and development of new programs and materials comes from only a handful of large foundations.*
3. **Most organizations surveyed seek to defray some costs through fees, but don’t cover their costs this way.** Content providers generally assume that their members and constituents are highly sensitive to price. As a result, most (70%) charge fees that don’t cover their costs. 15% of those surveyed cover their costs and break even, and 15% said that their fees generate revenue above and beyond costs.
4. **Providers surveyed are interested in aspects of a coordinated system, but are less interested in paying a fee to access it.** Providers expressed particular interest in a system that provides a single point of access for all learning resources and programs and in having access to real-time data on educational offerings, pricing, content gaps, and user behavior.

# Learnphilanthropy

## Symposium Agenda July 28-29, 2010

### Day 1: Wednesday, 7/28

TIME	SESSION	GOALS OF SESSION
Day 1		
2:00	<b>Opening Session</b> Who is here, why are we here, and expectations  <i>Where do we stand?</i> Determine range of perspectives on critical questions	<ol style="list-style-type: none"> <li>1. Provide context and clarify expectations</li> <li>2. Show range of players</li> <li>3. Lay groundwork for expanded ownership</li> <li>4. Get everyone engaged</li> </ol>
3:00	<b>Top Ten Insights</b> Presentation and discussion of top ten insights from the pre-symposium working groups that shaped the thinking of the core LP.Net Team.	<ol style="list-style-type: none"> <li>1. Establish: Good people worked on this, got to new ideas, new clarity, sense of path forward.</li> <li>2. Clarify: This is just a start, not a recommended answer.</li> </ol>
3:45	Break	
4:00	<b>From Problem to Solution: Collaborative Storyboarding</b> In small groups, we'll take a set of user-perspective "problem statements" and build solutions that imagine better, more collaborative systems, networks, and approaches.  <i>Report out: 2 minute presentations</i>	<ol style="list-style-type: none"> <li>1. Build excitement and buzz</li> <li>2. Establish real-world need</li> <li>3. Give substance we need to frame comprehensive concepts</li> </ol>
5:45	<b>Perspectives and Day One Close</b> brief comments about the visions presented	<ol style="list-style-type: none"> <li>1. Frame the day</li> <li>2. Reflect on direction</li> </ol>
6:00	<b>Appetizers and Cocktails...</b>	
	<b>Dinner on your own</b> We will provide information about good eating options nearby and orchestrate dinner "parties" for any participants who wish to continue specific conversations from the day.	

## Day 2: Thursday, 7/29

TIME	SESSION	GOALS OF SESSION
7:30	<b>Breakfast</b> <b>Debrief/Update</b> for day 2 newcomers	Ensure that new participants have overview of day 1 activity
8:00	<b>Reflections</b> Speakers comment on what LP.Net and a more coordinated system of grantmaker learning could mean for them, their organization, the field, and what they hope the day will bring.	Overnight reflections
8:30	<b>Day 2 Agenda Preview</b> Establish clearly that upcoming session, and “heat map”, will not arrive at binding answers, but will give intelligence to the groups that will carry this work forward	<ol style="list-style-type: none"> <li>1. Explain how we’ll track group preferences</li> <li>2. Explain “commitments” session</li> <li>3. Allow early departures to indicate where and how they are “in”</li> </ol>
8:45	<b>Making Yesterday’s Storyboarding Real</b> We will lay out comprehensive concept(s) determined from overnight consolidation of the solution ideas developed yesterday. Small groups will adapt the concept(s) to where <i>most in the group could support</i> .  <i>Create “heat map” – a quick way to identify full-group preferences and their intensity</i>	<ol style="list-style-type: none"> <li>1. Show what is common in the visions from day 1</li> <li>2. Flag the hard parts and get some tested ideas for solutions <i>that most could support</i>.</li> <li>3. Improve concepts</li> </ol>
11:00	break	
11:15	<b>Deep Dive:</b> Group divides by interest. Topics to include: <ul style="list-style-type: none"> <li>• <u>Making the Case for LP.Net:</u> Communications, Engagement and Small p Politics:</li> <li>• <u>Functionalities:</u> Issues around technology, framework, vetting, and others TBD</li> <li>• <u>Business Model:</u> Start up funding; costs and revenue</li> </ul>	<ol style="list-style-type: none"> <li>1. Surface good ideas, questions, recommendations, and others to engage</li> <li>2. Identify next steps and commitments</li> </ol>
12:00	lunch	
12:30	<b>Deep Dive Continued</b>	
1:15 -	<b>Progress Roundup</b>	Assess progress – where are we?
1:45	<b>Onward!</b> “Straw man” presentation from leadership team for how this work might go forward.  Participants comment, discuss, and say what they can do.	<ol style="list-style-type: none"> <li>1. Provide menu for opting in at various levels and from different stakeholder perspectives.</li> <li>2. Commit where appropriate</li> <li>3. Offer framework for decisions made post symposium</li> </ol>
2:45	<b>Messages from this Meeting</b> <i>75 committed players came together in Chicago to engage in field-wide innovation. They shared a vision of a collaborative learning network that would deliver the knowledge, skills and connections to re-shape the future of philanthropy. And they....</i>	Summary of co-creation at this event: what did we do together, that we can say out loud, and affirm in future actions.
3:30	<b>A D J O U R N</b>	