The Foundation Review

Volume 6 | Issue 2 Article 10

7-2014

Shifting From 'Evaluation' to Valuing: A Six-Year Example of Philanthropic Practice Change and Knowledge Development

Angela Frusciante
William Caspar Graustein Memorial Fund

doi: 10.9707/1944-5660.1205
DOI:

REFLECTIVE PRACTICE

Shifting From 'Evaluation' to Valuing: A Six-Year Example of Philanthropic Practice Change and Knowledge Development

Angela K. Frusciante, Ph.D., William Caspar Graustein Memorial Fund

Keywords: *Knowledge development, learning partnership, knowledge strategy*

Key Points

- Knowledge development is an emerging field in philanthropy and sits at the convergence of movement toward engagement, data-based decision-making, and networked learning for social and policy change.
- This article explores five knowledge-development trajectories at one family foundation that has funded a long-term change initiative. The trajectories include tools and frames that have been developed for increasing organizational learning, beginning network learning, and informing both program and operations for enhanced strategy implementation.
- Making the organizational shift from entrenched notions of third-party evaluation to creating a diversified knowledge development approach opened up new opportunities to think and talk about value in philanthropic work.
- This article also chronicles knowledge development from its inception as a dedicated position within a foundation, and raises key challenges and questions that can be useful to other foundations considering a knowledge function.

Introduction

Philanthropy has reached an exciting moment where conversations about evaluation are giving way to broader notions of learning itself as a strategic philanthropic investment. Evaluation is recognized as important, and yet not the only learning needed – particularly within complex social- and policy-change efforts. For the past six years, I have served as a knowledge-development officer at the William Caspar Graustein Memorial Fund, a family foundation in Connecticut. Through management of a learning agenda, I have been trying to address the limitations that even formative and developmental forms of evaluation have within a quickly evolving, complex change initiative. For me, success in "valuing" foundation investments has come through seeking ways for staff to engage with one another, with grantees and stakeholders, and with researchers, and also differently with data. Developing a diversified knowledge approach was less about discarding the notion of "valuing" and more about creating opportunities for all participants to deepen their understandings and sense of value about specific philanthropic investments.

As I connected with colleagues in philanthropy who were also grappling with evaluation and learning tensions, I realized that knowledge development at the Memorial Fund is situated in a broader field-building endeavor. Signs of knowledge field-building include the efforts of *The Foundation Review*; LearnPhilanthropy; the Council on Foundations' network approach for learning; research by Grantmakers for Effective Organizations (GEO); and the multiple convenings of foundation learning professionals. The participant list of a 2013 GEO conference pre-session included the titles of organizational learning director, evaluation director, program officer for learning and impact, knowledge manager, learning and evaluation manager, evaluation and learning director, research director, director of strategy and performance, program operations and evaluation director, manager for impact assessment and learning, evaluation and planning director, chief of staff, vice president for organizational learning and grants management, and organizational effectiveness and learning officer. This multitude and variety of titles are evidence that a knowledge field is emerging.

This article is a response to questions from colleagues across the country about the practice of knowledge development within the William Caspar Graustein Memorial Fund's change endeavors. I also wanted to chronicle the development of this formal position as one example within field-building. I describe five knowledge trajectories and share tools, frames, and key questions that may be useful to organizations and colleagues focused on learning for change initiatives. While I am not suggesting that this example be used as a model for other foundations, I offer this story to highlight the flexibility that I do believe is needed in developing a learning approach. Although my story takes place in a family foundation, colleagues have been drawing parallels to the challenges faced by other types of foundations and initiatives that range in their approach, goals, and target audience.

Consistent with reflection, I use the word "I" quite a bit in this piece. I do this also because colleagues encouraged me to be very conscious about the position of self in this work. This is very challenging in a learning arena where "we" is a much more appropriate stance. In addition, writing this piece – which raises key questions about the role of a knowledge development officer, about my role – felt risky and yet appropriate to the position's growth itself. I ask colleagues and readers to be understanding as I continue to struggle with these challenges.

Background

The William Caspar Graustein Memorial Fund is a family foundation focused on giving within Connecticut with the mission "to improve the effectiveness of education in fostering both personal development and leadership" (William Caspar Graustein Memorial Fund website, 2014). When I walked into the fund, I was told by executive director David Nee that we sought "to be a learning organization amongst learning communities." There existed a deep connection to values, an emphasis on the sacredness of story, and practices grounded in the belief that policy and practice and increasingly systems change could be sustained only if those most affected are part of the decision-making (Leiderman & Studdiford, 2010). In 2010, the Memorial Fund's major initiative, Discovery, continued a community-focused, collaborative, and multifaceted approach incorporating the result statement: "Connecticut's children of all races and income levels are ready for school by age five and are successful learners by age nine."(Discovery website, 2014).

Success in "valuing" foundation investments has come through seeking ways for staff to engage with one another, with grantees and stakeholders, and with researchers, and also differently with data. Developing a diversified knowledge approach was less about discarding the notion of "valuing" and more about creating opportunities for all participants to deepen their understandings and sense of value about specific philanthropic investments.

Two years prior, I had accepted a newly created senior management position as knowledge devel-

Learning was already incorporated throughout the foundation. It would have been inaccurate and disrespectful to claim that the new knowledge development position was the only way to learn. Rather, what became the focus of those first years was exploring ways to formalize learning processes – to make learning a conscious, transparent, and, where needed, systematic and shared activity.

opment officer, a dedicated investment in sharing learning. In hindsight, the first job description was very product focused, with responsibility for developing best practices and managing evaluation. Much of my first year, however, was about my enculturation into the organization, learning the values and ways of interacting internally and in grantmaking. As I sought to document some of the legacy of the foundation leaders, I quickly recognized that learning was already incorporated throughout the foundation. It would have been inaccurate and disrespectful to claim that the new knowledge development position was the only way to learn. Rather, what became the focus of those first years was exploring ways to formalize learning processes – to make learning a conscious, transparent, and, where needed, systematic and shared activity.

Although my intent was shared learning, I also had a personal and professional need for the position to develop an organizational identity and be acknowledged. To foreshadow the rest of this article, over the next few years it would become increasingly important to me that the knowledge development work be connected meaningfully to processes that informed strategy. In my second year, I proposed a knowledge development statement:

> Knowledge development at the Memorial Fund attempts to be about meaning making, not just information gathering; conversations about data, not just data collecting; participation and sharing in knowledge activities, not just report writing; and contributions to the fields of philanthropy, education, and community change benefiting children, not just internal discussion.

The statement provided me a way to decide which projects to propose and gave me permission to focus on how to do knowledge development. Nevertheless, even with a guiding statement, the early ambiguity of the work plagued the position. Being new to philanthropy, my need to fit into a program-officer role, to make knowledge development a unique yet understandable position, and to describe the role to potential partners, prompted a revision of the job description based on the guiding statement and yet focused on the functions of:

- organizational learning, as shared learning across staff and with trustees;
- management systems, including design of organizational systems and connecting of various forms of knowledge across the organization;
- support of program development, including coordination of internal data collection to inform decisions;
- network learning to support grantee learning and prompt shared knowledge construction across partners and stakeholders; and
- research in the fields of philanthropy, social and policy change, and education.

In the first four years, the knowledge development investment evolved from support of a full-time position; grant investment of $150,000, primarily into third-party evaluation within the community grant program; and approximately $40,000 of program-related budget that was categorized within the statewide and regional grant program to continued support of a full-time position with an approximately $250,000 budget spread across knowledge development grants and program-related expenses, convening, and personnel.

In 2013, this amount represented approximately 4 percent (not including full-time staff compensation) of the $6.9 million organization budget. Also by 2013, the knowledge development efforts had expanded to multiple learning partnerships – with leveraged resources, relationships with faculty in six universities, and an increased alignment with the Memorial Fund's community and advocacy efforts. At a 2014 board meeting, a longtime trustee requested that knowledge development updates be brought to the board in a similar way that strategies are discussed, perhaps one indication that knowledge development as a body of work is increasingly being conceptualized as part of philanthropic strategy. The following overview of philanthropy and specific foundation trajectories illuminates knowledge development as it is shifting from a management concept related to third-party evaluation to a diversified learning approach integral to strategic leadership.

Context for Philanthropic Change

Learning within and across organizations is a topic of study and practice unto itself. From research about organizational psychology and group dynamics to organizational information sharing and innovation, discussion of learning is not new outside or inside philanthropy.

In the management literature, for example, knowledge is credited as the source of competitive advantage (Peltonen & Lamsa, 2004). Various notions supporting efficiency and effectiveness have been born from adherence to such values. Through these conversations, core concepts about learning have emerged from organizational development and leadership research, concepts such as the learning organization (Knutson & Miranda, 2000; Kofman & Senge, 2001; Senge, 2006) and communities of practice (Lesser & Storck, 2001; McDermott, 2000; Wenger, 2008). Concepts of learning communities have alternatively emerged predominantly in the fields of education and community studies (Hugo, 2002; Humphries & Martin, 2000; Kilpatrick, Barrett, & Jones, 2003; Wenger, 2008). Each of these concepts carries its own implicit promise for helping various entities address the fast pace of change in contemporary society and the learning associated with a knowledge economy (A. Frusciante, 2009).

Philanthropy, as an organized sector and as the focus of rigorous research, is now more intently taking up this discussion of learning, in part because of the unique time in which we find ourselves in relation to evolving ideas about the purpose of philanthropy.

Running parallel to these conversations, the evaluation literature offers approaches that combine rigorous process with forms of development. These have provided researchers with a range of inquiry methods to address participation and learning. Examples of developmental, formative, and theory of change evaluation all provide ways to incorporate real-time questioning for change by individuals and organizations (A. K. Frusciante, 2004). Foundations have used and adapted such approaches which have provided methods for both learning and documenting change processes of philanthropy (Fulbright-Anderson, Kubisch, & Connell, 1998; GEO, 2009; Preskill & Beer, 2012). Philanthropy, as an organized sector and as the focus of rigorous research, is now more intently taking up this discussion of learning, in part because of the unique time in which we find ourselves in relation to evolving ideas about the purpose of philanthropy.

Historically, philanthropy has been viewed as charity, a vehicle for social analysis and reform, a contributor to community building, a prompter

A focus on knowledge development practice is particularly important because efforts to see and address ingrained structures of inequity call us all to both reflect and act.

of coalition building and advocacy, and, more recently, as a provider of venture capital to incubate social solutions. In addition to traditions of "relief," "improvement," and "social reform," philanthropy is also coming to focus on "underlying circumstances of inequality" and invest in lifting up civic engagement by supporting citizens to "work together on their shared concerns"(Lynn & Wisely, 2006, pp. 210-217) .

Regardless of these traditions, the stance of philanthropy has often been one of being outside of social challenges. Indeed, philanthropy has some distinctive attributes and privileges. Addressing philanthropy, within the focus of equity, as a separate sector – different from the private, public, academic, or nonprofit sectors – is appropriate because philanthropy is uniquely positioned to be strategic. Funders have the potential to see things holistically, be flexible in utilizing a broad range of tools, be free to take risks, and commit to investing in under-represented people and causes (Rapson, 2008).

Notwithstanding the position of privilege, the current stance in philanthropy that I am focused on sees foundations as organizations situated within the social and policy systems they are seeking to affect. The position of foundations to structural change is unique, yet is still an insider position. Foundations thus become mechanisms, gears within a social structure, and they themselves connect and move other gears. Foundation efforts become focused on leveraging this position to address inequities by targeting structures rather than symptoms (Epstein Korten, 2009).

A focus on knowledge development practice is particularly important because efforts to see and address ingrained structures of inequity call us all to both reflect and act. This moment for knowledge development within philanthropy seems to be evolving from a unique convergence between current notions of philanthropic purpose, process, and what it means to be strategic in addressing inequity.

Engaged approaches to philanthropy encourage foundations to be self-aware and transparent about their position in social and policy change. There is a spectrum of ideas of engagement. At one end are foundations that target local issues as critical and emphasize philanthropic responsibility for investing in efforts that are are longer term, community-driven and place-based (Martinez-Cosio & Rabinowitz Bussell, 2013; Weiss & Lopez, 1999). At the other end of engagement, embedded philanthropy is approached as not just investing in, but itself fully integrated in one or more of the concentric, often layered, structures of organization, and local, state, and national partnerships" (Kremers, 2011, p. 40). Treating foundations as components within the systems needing change emphasizes the need for linkage (Brown, Chaskin, Hamilton, & Richman, 2003) and also prompts questions of foundation transparency and accountability (Martinez-Cosio & Rabinowitz Bussell, 2013), power, and role.

Data-based decision-making and assessment grow from an emphasis on accountability with foundations increasingly using indicators, measures, and complex evaluation models to document results and demonstrate investment impact. Reasons for this include legal scrutiny and public pressure to justify tax-exempt status, the increasing professionalization of philanthropic evaluation, and a desire to make the most impact (Dobkin-Hall, 2003). In discussions that position philanthropic investment as akin to venture capital, models of measurement can also help with identifying and managing perceived investment risk (Letts, Ryan, & Grossman, 1997).

To show investment value and strategy success, foundations have explored multilayered approaches that might show program, organizational, and financial effectiveness (Connolly, 2008; Putnam, 2004). Sometimes data is approached from an applied and real-time intent, connecting processes of measurement to organizational learning, continuous improvement, and strategic development (Brown et al., 2003; GEO, 2009, 2013; Smith-Milway & Saxton, 2011; Twersky & Lindblom, 2012). Approaches like action learning, developmental evaluation, and results-focused and theory of change evaluation bring data inquiry into closer alignment with decision-making (Auspos & Kubisch, 2004; Preskill & Beer, 2012; Wales, no date). They connect a foundation's ability to reflect on and demonstrate performance directly to its strategic value in broader societal change.

When foundations transfer these approaches to grantees, grantmaking requirements can come to include using indicators and performance measures to demonstrate impact (Campbell, lyons, & LaForgia, 2013). Yet questions remain about power relations and the role of foundations in the press for accountability – questions such as accountability by whom, to whom, and for what ends (Gopalakrishnan & Preskill, 2011; Wales, no date). Where these questions connect to ideas of collective action, shared learning, and documentation, knowledge development becomes critical to the move to a network mindset.

Network-driven strategy is the current buzz in philanthropy. Networks are not a new concept or practice in foundations that support collaboration, coalitions, and social-capital building. Yet today, network concepts seem to be influencing the ways in which philanthropy talks about itself and about change efforts (Monitor, 2012). Social networks are most simply defined as the relationships between people or "systems of social ties that link people to one another" (Plastrik & Taylor, 2010, p. 9). Networks are praised for being the force behind the most basic of tribal exchange and modern policy achievements such as the civil rights movement, as well as contemporary systems-change results (Easterling, 2012; McLeod-Grant, 2010). Advances in social media have made it possible to decentralize information and make rapid information exchange possible for social movements, further making network action visible. Experiments are beginning to document the relationship of foundation network investment to program outcomes (Monitor Institute, 2012).

Grantmaking requirements can come to include using indicators and performance measures to demonstrate impact (Campbell, lyons, & LaForgia, 2013). Yet questions remain about power relations and the role of foundations in the press for accountability – questions such as accountability by whom, to whom, and for what ends.

Network conversations draw attention to several issues: What does it mean for philanthropy to move out of the center and put social mission above organizational branding? What does it mean to base shared work on values and trust rather than formal authority and accountability systems (Wei-Skillerman, Silver, & Heitz, 2013)? What does effectiveness mean in a network (Monitor, 2012)? How can network analysis support connection (Hughes & Goldenhar, 2012)? How might a network mindset shift the notions of innovation from "improving organizational effectiveness, efficiency, and responsiveness" to "coordination and adaptation?" (Fulton, Kasper, & Kibbe, 2010, p. 2). How are scaling and sustainability understood in this paradigm (ISI, 2010) or perhaps replaced by notions of network growth, resilience, reach, and growing impact (GEO, no date; Plastrik & Taylor, 2010)? How is leadership distributed (Hughes & Goldenhar, 2012; McLeod-Grant, 2010; Monitor, 2012) and what roles do foundation staff have in network leadership (Brown, 2012)? What are the necessary skill

The decentralization of evaluation failed at shared knowledge construction because it linked participants to data collection without linking them to a shared theory of change. Without distributing skills related to interpretation, communication, and power dynamics, evaluation became re-centralized.

sets and supports for this work (Easterling, 2012; Monitor, 2012)?

Time will tell whether and how network concepts might enable us to imagine and "be" different in philanthropy. Reflection on the role and practice of philanthropy in network endeavors suggests that these investment approaches not only influence grantee behaviors, but also call for foundation responses that are about philanthropic organizational structure itself. With reference to foundations, network learning outside and organizational learning inside do not operate independently. What connects them is the organizational structure and behavior of foundations (A. Frusciante, 2013).

Author Transparency

Within this context, I identify professionally as a sociopolitical scholar with research, evaluation, and teaching experience across various equity initiatives, from prison aftercare and housing to community development and education. I believe knowledge construction is an embodied and shared experience that takes place as people work together to make meaning in action. Two key professional experiences bring me to this work – a dissertation process and serving as a knowledge development officer in a family foundation focused on education change. The latter experience is the focus of this article and the former I share here, albeit briefly.

During a doctoral process in education policy, planning, and administration, I developed a content-analysis method that enabled me to examine the written evaluation reports of a 10-year Ford Foundation community change initiative. The initiative was situated within what I came to consider a learning coalition marked by the Aspen Institute's Roundtable on Comprehensive Community Initiatives and its support of theory of change evaluation. The analysis involved identifying concept clusters as they occurred and changed over the life of the evaluation reports, which I used as evidence of documented learning.

The reports revealed findings about community collaboration, processes of community development, and the tendencies (at least in this one community-initiative case) for the intent to decentralize data to ultimately end in quite centralized evaluation reporting. Whether related to single-source funding or issues of foundation power and control, I suggested that the decentralization of evaluation failed at shared knowledge construction because it linked participants to data collection without linking them to a shared theory of change. Without distributing skills related to interpretation, communication, and power dynamics, evaluation became re-centralized (A. K. Frusciante, 2004).

With this experience, I entered the Memorial Fund believing that decentralizing data access is insufficient; decentralization of the understandings of the theory of change is necessary. For community collaborative efforts to be sustained, the evaluation process needs to be distributed so that everyone interacting with data is interpreting evidence with shared goals in mind. For evaluation to be effectively decentralized, all participants must develop data-collection and analysis skills as well as internal and external communication skills, understandings of and shared expected outcomes, and awareness of the dynamics of information power in the contexts within which data are created and used. Program evaluation processes are important, but not enough, to affect social and policy change. Rather, efforts to construct knowledge in learning coalitions, both locally and more broadly, need to be a focus.

Six years as knowledge development officer gave me the opportunity to examine these beliefs from within a change initiative. However, I encourage readers to juxtapose their own experiences to questions. How do you see yourself in relation to learning within your organization and for social and policy change? What role does your foundation and its partners have in processes of "meaning making" and social change? What is your possible relationship to communities and grantees as learning partners? How do you believe foundations prompt, interact, and adapt within and through learning partnerships and network learning?

Knowledge Development Emergence – Five Organizational Trajectories

From this point, I reflect on the knowledge development work at the Memorial Fund through description of five trajectories. I also try to surface my intent (whether it was conscious at any given time or not) in the knowledge development approach. I must note that the foundation was never on the extreme of these spectrums. Framing this reflection as trajectories is my reaction to ideas and dichotomies in the field. For any foundation, looking at the spectrum can help in raising questions about how to use learning strategy to more fully act on organizational values.

From Products to Functional Areas

While focusing on products was important for sharing ideas via reports, the move to functional areas – organizational learning, management systems, program-development support, network learning, and research – shifted my thinking to how the knowledge development processes could contribute to strategy and organizational goals. Creating functional areas, each with a goal statement and anticipated funding level, also led to conversations about the desired investment of time and money into each goal. Early on, more effort was dedicated to designing organizational

For community collaborative efforts to be sustained, the evaluation process needs to be distributed so that everyone interacting with data is interpreting evidence with shared goals in mind. For evaluation to be effectively decentralized, all participants must develop data-collection and analysis skills as well as internal and external communication skills, understandings of and shared expected outcomes, and awareness of the dynamics of information power in the contexts within which data are created and used.

learning processes. As these became routine and colleagues took on the facilitation of some, the knowledge development investments became weighted toward learning partnerships in the initiative's network. One of the earliest knowledge development processes, that signified initial success of the organizational learning function, was the creation of "reflective space."

Given the action orientation of change initiatives, a complex strategy, and mission-driven staff, it is not surprising that staff first wanted time and space to reflect. Reflection sessions started with the intent to remove the pressure of decision-

Some questions emerged in the practice of creating reflective space. How often should we reflect together? Who decides on topics? Which topics are most appropriate and when? Are topics solely about organizational culture or can they be about specific strategy? What do we do with discussion that invites programmatic or strategic decisions? How do we capture decisions wanting to be made and where do we take them?

making, problem-solving, and "to do" lists from the discussion of strategy concepts. Staff accountability in this space included contributing ideas for topics (prioritized by the executive director), reading minimal advance material, adhering to the norms of the space, and simply being present, as your whole self, in the room. In this space, distinctions between levels of organizational authority and professional status were less important than life experience and perspective.

The reflection sessions usually lasted three hours. At first, a trusted consultant facilitated the meetings. I then moved into facilitation. Through the process, staff discussed organizational norms and tried out different ways to hold each other to desired norms. At one point, the executive director stepped out of the agreed upon norms and two program associates were able to raise this up and preserve the norms of the group. This event demonstrated that the group could be trusted to "hold the space." From then on the reflection-session planning and facilitation became a distributed process. Any staff could propose, plan, and facilitate a reflection session. They could also access consultant coaching in design and group dynamics. Once leadership was distributed, the reflection sessions became a space for staff to experiment with ways to work together on strategy issues. Eventually these practices started to show up in other organizational settings.

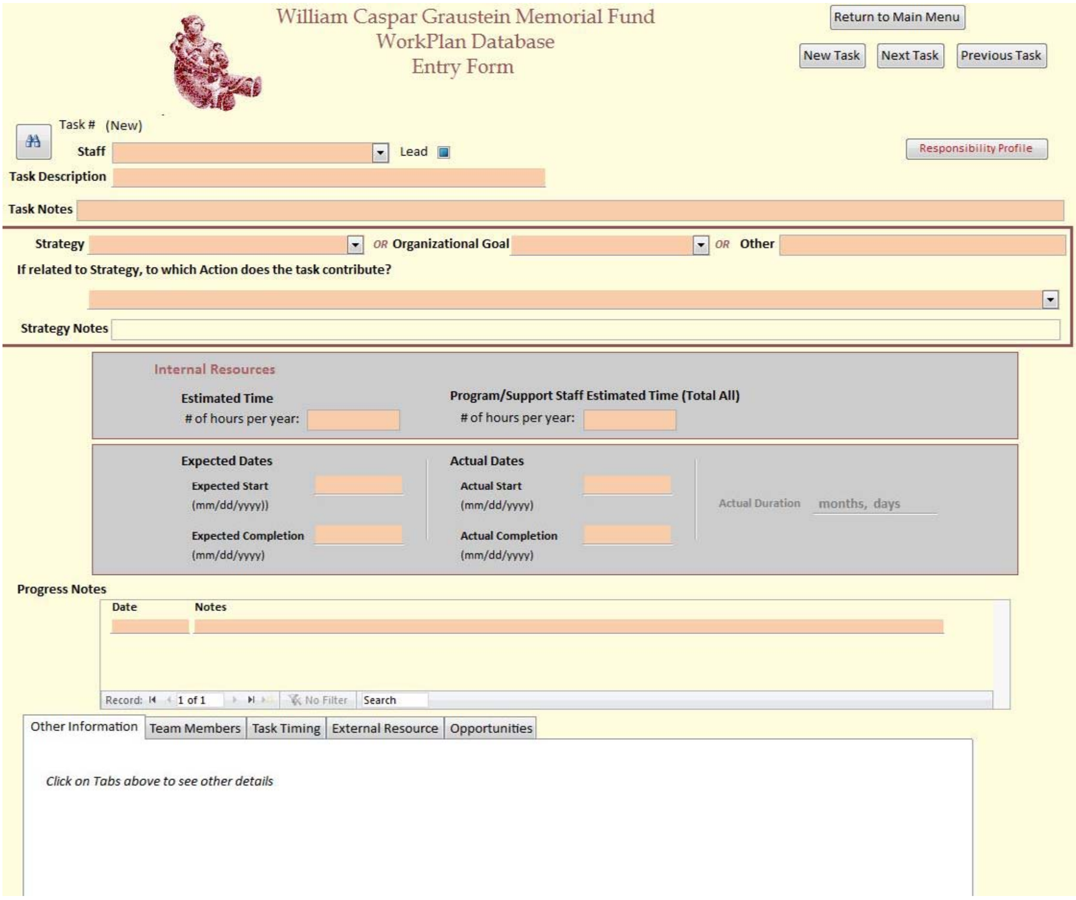
Some questions emerged in the practice of creating reflective space. How often should we reflect together? Who decides on topics? Which topics are most appropriate and when? Are topics solely about organizational culture or can they be about specific strategy? What do we do with discussion that invites programmatic or strategic decisions? How do we capture decisions wanting to be made and where do we take them?

Although I continue to see reflections as a success in our move toward more conscious and shared structuring of organizational learning culture, it is important to note that they have not continued with the same frequency. I believe this is partly due to lack of time. It may also be due, however, to the variety of other learning opportunities that have emerged. It is challenging to consciously look at a successful learning process and consider that it may no longer be useful. Any activity may become a recurring ritual, a tool to be pulled out as needed, or simply a step in an organizational process, where the specific tool or process seems to disappear.

From Isolated Learning to a Shared Process

After the first few years of experimenting, it was clear that adding more discrete activities to the organizational learning was neither useful nor possible. Not only was time an increasing issue, but so too were staff tolerance and perceptions of utility. It became important to identify the purpose of each space or activity and determine how it contributed to improvement. A work-plan process and database was a tool that served this role organization-wide and helped me to really examine the time investment in the knowledge activities.

FIGURE 1 Workplan Database Task Entry Form


William Caspar Graustein Memorial Fund
WorkPlan Database
Entry Form

Return to Main Menu
New Task | Next Task | Previous Task

Task # (New)
Staff | Lead
Responsibility Profile
Task Description
Task Notes
Strategy | OR Organizational Goal | OR Other
If related to Strategy, to which Action does the task contribute?
Strategy Notes

Internal Resources
Estimated Time
# of hours per year:
Program/Support Staff Estimated Time (Total All)
# of hours per year:

Expected Dates
Expected Start (mm/dd/yyyy))
Expected Completion (mm/dd/yyyy)
Actual Dates
Actual Start (mm/dd/yyyy)
Actual Completion (mm/dd/yyyy)
Actual Duration months, days

Progress Notes
Date | Notes
Record: 1 of 1 | No Filter | Search

Other Information | Team Members | Task Timing | External Resource | Opportunities

Click on Tabs above to see other details

Matrix-style work plans had been used successfully for planning. However, the Memorial Fund is a relatively flat organization with many moving parts and multiple external partnerships. The size of the staff had increased with complexity continuing to grow. At any given time, a program staff member might be asked to manage a program area, contribute to organization-wide goals such as continuous learning, share a specific skill like communication, or participate on a team. This variety and the increased focus on results-based accountability prompted the need for a database, most importantly to allow the same staff workload information to be shared and discussed in multiple ways.

The data process required program staff to enter in their specific tasks and to connect each task to initiative strategies and actions or shared organizational goals. Prompts asked for anticipated resource allotment, support needs, and progress. (See Figure 1.)

Pull-down menus made the information easy to input and consistent across staff members. For example, tasks could be analyzed and discussed in various ways: to show individual and collective staff workload, level of staff investment into each strategy and action, or workload balance between program staff investment in grants and in organizational operations. This information was

One of the staff's nostalgic stories was about the days when the organization was small, when staff shared offices and often engaged in "hallway" conversations about strategy. There was a sense of loss that program areas had become less integrated and less synergistic.

reported in list format, matrix format, and with color-coded notecards on flipcharts.

The design process from the very beginning included feedback from program staff. The design was also a partnership with the executive assistant who would ultimately be responsible for managing the process and ensuring that the reports generated were at the table for various internal conversations (e.g., management meetings, one-on-one conversations, dedicated work plan conversations).

The database design was intended to:

- provide a collective picture of staff efforts in relation to strategy and organizational goals,
- make visible where time was being spent so new opportunities could be decided upon,
- identify overlaps in perceived responsibility and possible synergies among tasks,
- surface high-support tasks and timing during the year, and
- provide an opportunity for each staff member to distinguish between what they were functionally accountable for and how they were strategically accountable.

The latter of these was quite exciting. One of the staff's nostalgic stories was about the days when the organization was small, when staff shared offices and often engaged in "hallway" conversations about strategy. There was a sense of loss that program areas had become less integrated and less synergistic. In the work plan process, staff could sit at a round table and share their tasks with one another. The roundtable conversation was focused on progress or individual challenges related to tasks and functions. When staff moved to the hallway, however, the conversation was intended to be about seeing patterns across the work, identifying connections, and noting how as an organization we were addressing any of the planned strategies. I hoped that the tool had helped to reclaim the nostalgia of teamwork. According to the executive director, it also infused the conversations with data and graphic power.

Some questions emerged in practice of designing and implementing this work plan process and database: How do we separate performance monitoring from strategic conversations? How much time must be invested in entering data? Whose time? At what level of detail? Is it useful to prompt staff to frame their work with a task orientation – does this take away from a more holistic framing of philanthropic work? Do staff share definitions of terms like "task," "role," and "action"? Do they need to? How do we document flexibility and opportunism without becoming data-obsessed?

In my perspective and looking back, the biggest challenge in the work plan design and implementation was lack of clarity about the tool's purpose. Although there was extensive consultation with program staff on the format of the database and many revisions and efforts to streamline and focus only on the most needed information, there continued to be disagreement on the utility of the tool and process. Whether the tool was really best designed for management or learning, and if these processes could effectively be combined, still remain in question. There were also questions by staff as to whether different types of work could be fairly represented in any one format.

Considering how to share a multifaceted strategy with a board that was interested in being part of conversations, program staff looked to various forms of dashboards. We wanted a format that was concise, yet not overly simplistic and that could help us to engage trustees more deeply in the strategy. I was reluctant to start a dashboard before we had rigorous data systems in place to populate it and we were all concerned about being able to show foundation contribution in areas where data could not prove cause and effect. In terms of the learning process, it was important that the dashboard process allowed program staff to discuss strategy, think about individual contributions to strategy, and develop a shared way of thinking and talking about challenges and successes before presenting to the board.

The dashboard format that emerged after borrowing from colleagues, piloting with the board, working on communication, and revising over time includes: (Studdiford, 2014b)

1. a statement of the strategy and actions as released publicly in the strategic plan.

2. a rationale for why this strategy was created (this text comes directly from the full strategic-planning report that was approved by the board).

3. a progress report including:
   - Where are we today?
   - What has gone well ?
   - What have been the challenges?
   - What have we changed based on what we learned?

4. effort data (to share specific inputs that we think will lead to change).

5. impact data (as evidence of change).

6. strategy milestones (presented in chronological order and color-coded to identify events as they relate to the foundation, initiative grantees, and broader stakeholders. This section was designed on the premise that it is possible to share information that reasonably suggests contribution to change even if causal evidence is not possible.).

The biggest challenge in the work plan design and implementation was lack of clarity about the tool's purpose. Although there was extensive consultation with program staff on the format of the database and many revisions and efforts to streamline and focus only on the most needed information, there continued to be disagreement on the utility of the tool and process. Whether the tool was really best designed for management or learning, and if these processes could effectively be combined, still remain in question.

7. learning questions from board and staff (questions that have come up in board or program staff meetings; they are not dealt with mechanically, but are tracked to document the evolution of our questioning and to inform our learning agenda).

Some questions that emerged in practice: How do we create the dashboard as a tool for both learning and communicating? Who needs to be involved in giving input into each dashboard? Should information be gathered through group discussion or individual input? How do we effectively utilize the board discussion about the dashboard to inform strategy implementation?

One of the struggles I had with the dashboard was letting go. I had prompted the notion that the knowledge development role in organizational learning was a design role and that once processes were developed, leadership would then be distributed. This was difficult in practice. Once distributed, a process could change into something different. After design and a few cycles, the dashboard came to be labeled a communication tool and time pressures reduced group conversations about how to understand and talk about strategy.

One of the struggles I had with the dashboard was letting go. I had prompted the notion that the knowledge development role in organizational learning was a design role and that once processes were developed, leadership would then be distributed. This was difficult in practice. Once distributed, a process could change into something different. After design and a few cycles, the dashboard came to be labeled a communication tool and time pressures reduced group conversations about how to understand and talk about strategy. Some staff said they felt that the learning process was being lost.

From Outside Evaluators as Observers to Researchers as Learning Partners

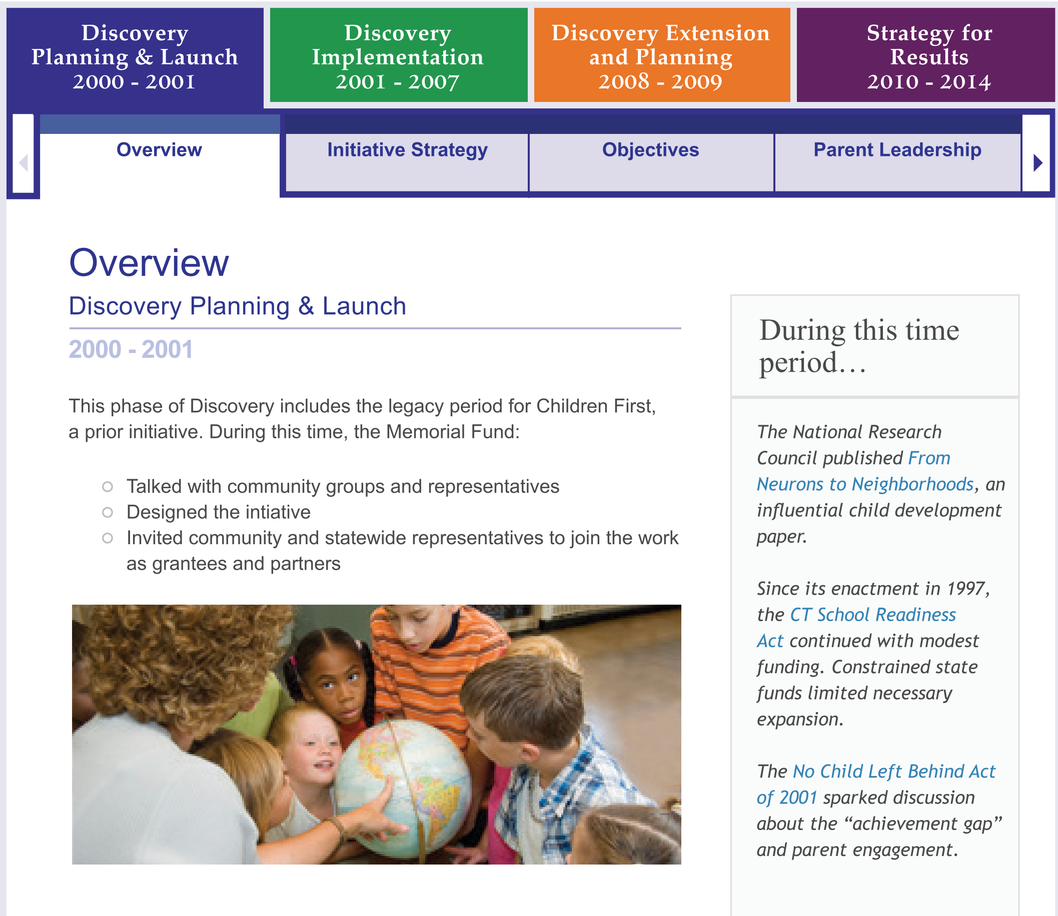
At the start of the knowledge development position, an emphasis was placed on documenting the fund's approaches. Leadership wanted to make sure the history of the foundation, the values, and the development were not lost. We commissioned studies about culture and behavior (Leiderman & Studdiford, 2010; Magno, 2010; Stephens & Studdiford). The organization accepted opportunities to be a case study for researchers with applicable framings (Darling, 2012; GEO & Jump, 2011). These studies helped us to both document the work and see how others understood our approach. To respond to desires of transparency and the many questions we received about why the Memorial Fund did what it did, however, we needed a different tool.

As the fund began shifting from third-party evaluation, we challenged our existing evaluators to work with us on developing a tool and process to share the fund's decision-making. In light of the complexity we wanted to enable stakeholders to drill down from short description to deeper description and further to evidence-based learning and results. What emerged was a web-based decision timeline with links to documents, video, and graphics. (See Figure 2.)

The timeline evolved into an annual process where staff share their perspectives on the critical strategic decisions the fund has made in a specified period (Studdiford, 2014a). Staff discuss what we learned during implementation and how we think the decisions connect to context and evidence. A consultant facilitates staff conversations and conducts targeted interviews that invite stakeholders to help us remember. Most important, we try to hear when the perceived impact might not have been consistent with staff intent. The decision timeline has also become a public archive of both program documents and evidence-based reports.

Questions that emerged in practice are: Is anyone reading the timeline? If so, is it answering their questions about the fund? How does staff reconcile potentially different views of any given deci-

FIGURE 2 Decision Timeline



sion? How do we involve staff while keeping the writing and review streamlined so that participation isn't overly cumbersome? Are there ways to elicit response from stakeholders without creating expectations for a fund response?

Some of my challenges in implementing the timeline became developing ways to simplify the process while holding onto the learning discussions and joint review of all decisions. In addition, I had to decide how much I should frame the story of any key decision and how much to step back and let the consultant drive the process and let staff frame each decision story. In addition, as the consultant and I continued to refine the process we struggled with wanting the online site to include social media interactions with stakeholders, while wanting to preserve the narrative from a staff perspective without promising a response to stakeholder comments. This interactive feature is still being considered, as well as some technical changes that would allow readers to follow specific strategy elements.

From Third-Party Research Studies to Inquiry That Builds Analytic Capacity

During planning for the 2010-2014 strategy, the fund used a results-based accountability approach that was grounded in the desire to start with the end in mind and ultimately "roll up" performance measures to show contribution to that result. Through our grant structure, program officers encourage grantees to collect, analyze, and make meaning of data. Through capacity building, staff

REFLECTIVE PRACTICE

Since we asked this of grantees, it was important for us to engage in a results-focused process, too. As the staff engaged in this process, it became apparent that strategic thinking for us did not happen as a roll-up process alone, nor as a theory of change holistic focus. I noted that in planning conversations, staff discussion was dialectic – moving from part to whole, from program to initiative strategy, and back again.

support skill development and grantee peer sharing as well. Since we asked this of grantees, it was important for us to engage in a results-focused process, too. As the staff engaged in this process, it became apparent that strategic thinking for us did not happen as a roll-up process alone, nor as a theory of change holistic focus. I noted that in planning conversations, staff discussion was dialectic – moving from part to whole, from program to initiative strategy, and back again. As we started to change our evaluation approach, it became important for me to think about an appropriate organizational data process. I shifted to talking about assessment in order to focus on systematic data processes – from focused questions to data collection and management and to analysis and application. Designing an in-house assessment process has proven more challenging than expected, because the process is making transparent the many organizational decisions that need to be articulated and sometimes clarified in order to put in place a clear data system.

Out of this desire emerged a targeted assessment process designed to function through an internal and external research team working closely with program staff. My intent was to build on existing program data before proposing any new data collection. I believed that focusing on internal management of data would mean having data in-house that could be available to a variety of different organizational conversations and purposes, including programmatic decision-making and strategic planning.

The task I set out was challenging. I expected to invite a university partner to learn about us and with us and help guide the systematizing of data collection. Together as an internal/external research team, we were to develop processes and build analytic capacity among staff, do targeted data analysis, and facilitate meaning making among staff, all while connecting program-level questions and data to broader initiative strategy questions. We have been documenting this process as we grapple with the challenges (Arafeh, 2014; Arafeh & Quenoy, 2013).

Questions that emerged included: How do I manage an internal/external team in a very participatory staff-engaged process? How does the team respond to program-data needs in real time and ensure that these remain connected to key questions about initiative strategy? How do we ensure data are clean enough for systematic analysis? What is the level of capacity – skill, interest, and time – needed for staff to engage in data interpretation? How can we hold onto the analysis space for learning before jumping to issues of public presentation? How do we handle conflict? When and how should executive and board leadership be in the conversation about data analysis and interpretation?

Leading this process is the most difficult of all the learning processes in the knowledge development approach. I expected a lot from the assessment work, as the process that would contribute systematic and longitudinal data to the multiple other learning spaces. Even though we opened up the possibility for a design targeted to the Memorial Fund's values and interests and to the staff learning styles, the process has involved many challenges.

This assessment process is becoming a hot spot where disconnects in staff perspectives about the work are surfaced, disagreements among staff about what is important and how to achieve goals are revealed, and where we struggle with aligning our individual frames and program-area data in ways that inform a shared understanding of strategy. As more and more tensions surface, questions are emerging about how "evidence based" the organization needs to be, what we consider appropriate evidence, and how our approach to data aligns with organizational values. All of these questions operate alongside the issue of a complex and multifaceted initiative. In addition, the iterative nature of collaborating and attempting to develop staff and organizational skill as the assessment process is unfolding make it difficult to demonstrate progress. Having an external partner in this work has been essential to both help to move the process by surfacing difficult questions and to reflect back to the organization the development that was actually occurring, even if it was so gradual that we were not conscious of it.

Questions are emerging about how "evidence based" the organization needs to be, what we consider appropriate evidence, and how our approach to data aligns with organizational values.

From Funding Studies for Foundations and Grantees to Leveraging Research Dollars Into Learning Partnerships

The knowledge development efforts were intended to be consistent with the fund value that those most affected by any efforts be at the table. This meant paying attention to inquiry processes and the various ways that multiple participants could be involved in the learning beyond reading a report. For me, part of the shift from traditional third-party reporting was asking where learning could occur beyond the researchers and staff. I encouraged researchers, no matter the type of inquiry, to think about how to broaden involvement. For some research partners this meant creating data-collection opportunities where focus groups also served as discussion and sharing opportunities for those providing information (Rivers & O'Bryon, 2014). Sometimes research was conducted in coordination with community partners or grantee organizations with an intent to collect and share data directly applicable to their work or even to transfer data collection and analysis skills directly to the organization (Canada & Bland, 2014; Stephens & Studdiford, 2013). Even more intense was the design of participatory approaches where community members became co-researchers and conducted action-inquiry projects to address issues that they themselves defined (Bray, 2014). In addition, although the fund's knowledge development focus was on providing inquiry within the Discovery initiative, the grant-proposal format required university researchers to share information about how they would bring their processes and learning to students and faculty colleagues.

Questions that are emerging in efforts at research and broader network learning are: How do we identify and support scholars in learning partnerships with communities, the initiative, and the foundation? How do we become aware of emerging partnerships in the community where explicit inquiry processes can advance the efforts? How do we provide grant guidelines and engage in partnerships that leverage university resources and also contribute to academic culture in useful ways? How do we sustain partnerships that are based in specific researcher interest while responding to evolving organizational and network learning needs?

Research partnerships can be time and resource intensive. When university partners are involved, institutional bureaucracy and pressures increase the grant-management challenges. Add in the desire for scholars to conduct rigorous research in ways that are embedded within a complex initia-

REFLECTIVE PRACTICE

Research partnerships can be time and resource intensive. When university partners are involved, institutional bureaucracy and pressures increase the grant-management challenges. Add in the desire for scholars to conduct rigorous research in ways that are embedded within a complex initiative and in participatory ways that involve multiple stakeholders in collaboration and contribute to network learning, and the task becomes quite challenging.

tive and in participatory ways that involve multiple stakeholders in collaboration and contribute to network learning, and the task becomes quite challenging. Add in an equity focus that requires foundation and research partners to remain mindful of the ways in which power and authority can influence learning, and the challenge calls for a level of strategic design consideration as part of philanthropic strategy.

Field Building for Knowledge as Strategy

I see the creation and implementation of the knowledge development position at the Memorial Fund as illustrative of the questions and desires emerging throughout the field of philanthropy. Learning, whether in private, family, or community foundations, is critical for effectiveness. Learning, whether in single-grantee support efforts or within multifaceted and network initiatives, is crucial to maximize philanthropic investments to address complex challenges.

To date, philanthropic knowledge efforts have included various emphases: scientific and evaluative research approaches; applied and knowledge utilization emphases (Williams Group, 2003); efforts to share complex information (ROIVentures, 2008); and knowledge management approaches that raise questions about how information can be shared most usefully across organizational processes (Schwab Foundation, 2004). Researchers in change efforts specifically assert that two types of actions are needed in order to achieve more "effective" learning – "treating learning as a core objective of philanthropic work" and changing practices, incentives, and investments within foundations themselves (Brown et al., 2003, p. 48). What is different in this period and among the convergences in philanthropy is that knowledge is now being framed as itself a form of strategy requiring its own approach (Patrizi, Heid Thompson, Coffman, & Beer, 2013).

At the Memorial Fund, there were a number of lessons, tensions, and related questions that emerged as knowledge development as a function was put into practice. As knowledge development has become an action-oriented grantmaking activity at the fund, the work has started to look less like learning about a program and more visibly like a program itself – a process that can be considered capacity building, advocacy, partnership, and even leverage. These similarities have at times left me feeling in competition with program staff, a position not conducive to supporting learning. When knowledge development has aligned closely with program activities and real-time decision-making, however, it felt to me as if I risked becoming invisible and marginalized, and actually not able to influence and adapt learning to inform strategy decisions.

I have realized that sometimes my sense of marginalization was my own need for recognition and sometimes my own reluctance to ask colleagues how they were using the learning processes in decision-making. Looking back and after discussion with colleagues, I also realized that there is something I still need to consider about how I see the differences and relationship between ideas of authority, influence, and autonomy. These all seem critical to my serving in a knowledge development role.

Questions for Foundations

Knowledge development as a staffing investment

- What is expected of the knowledge development role?
- How much room is there for the role to change?
- How can competition be minimized such that learning is the focus, while still sustaining a knowledge development position as essential to strategy and operations?

Knowledge development as a grant or program investment

- What change is naturally occurring in your organization or strategy? How can you tap into any change or transition as an opportunity to adapt to a learning approach?
- In what networks is the desired social- and policy-change initiative situated? How does knowledge development interact within these networks?
- What grant structures will support learning partnerships for network learning?

Knowledge development as a leadership investment

- What is the relationship of the knowledge development role to the board, key stakeholders, organizational operations and functioning, strategy, public accountability, grantmaking, programs, and to networks for change?
- Where is knowledge development located? Based in what authority?
- How does knowledge development mirror, map onto, or intersect with organizational values and structure?
- In what ways does knowledge development, as a role and as a process, connect with strategic decision-making?

Any foundation focusing on its own learning process will have questions to consider. I have tried to illustrate key aspects from my experience in order to place some guideposts in how philanthropy can continue to explore the role that learning has within foundations, throughout initiatives, and as situated within the field more broadly. (See sidebar, Questions for Foundations).

With such questions, and as the knowledge function in philanthropy emerges as a distinct field, we have the opportunity to be conscious about the purpose and parameters. First, engagement in inquiry can be costly in terms of time, but trial and error are the work of learning. This is an inherent tension in a world where efficiency often parallels conversations of effectiveness. It is also often difficult to put boundaries around a position that is centered on learning and change. Knowledge work itself shifts with the change that it prompts. The data and learning needed for programmatic decision-making are short term and fluid, while the data and learning needed for initiative decision-making are longitudinal and more broadly contextualized. This reality makes deciding where knowledge resources are dedicated important and difficult in change initiatives.

Knowledge work itself shifts with the change that it prompts. The data and learning needed for programmatic decision-making are short term and fluid, while the data and learning needed for initiative decision-making are longitudinal and more broadly contextualized. This reality makes deciding where knowledge resources are dedicated important and difficult in change initiatives.

These questions and tensions are not surprising given the emergence of a field within a shifting philanthropic landscape. Understanding the context within which knowledge development is occurring is critical. Developing a shared notion of what a knowledge development position is and what skills are required will help in building a

REFLECTIVE PRACTICE

learning field. Most important, we need to examine how knowledge development positions can be sustained organizationally – betwixt and between strategy and operations, sometimes sitting within tensions, sometimes pulling toward the unknown of innovation, and sometimes moving into the center of change efforts.

Acknowledgements

The conceptual development of this work reflects the six-year investment in knowledge development by the William Caspar Graustein Memorial Fund leadership and program staff; the guidance and encouragement of David Nee, the founding executive director and often mentor; nonprofit and university-based scholar partners; learning colleagues who associate through Grantmakers for Effective Organizations; and an amazing group of leaders that I had the privilege of engaging with through the Council on Foundations Career Pathways leadership program. It was this support that prompted me to reflect on my practice of knowledge development as itself a leadership activity.

References

Arafeh, S. (2014, April). *Assessing for knowledge development and organizational learning's possible contribution to evaluation theory: The case of one philanthropy.* Paper presented at the 2014 Eastern Evaluation Research Society Annual Meeting, Gallaway, NJ.

Arafeh, S., & Quenoy, P. (2013, April). *Evaluation and data in a learning organization: One philanthropic organization's experience.* Paper presented at the 2013 Eastern Evaluation Research Society Annual Meeting, Gallaway, NJ.

Auspos, P., & Kubisch, A. (2004). *Building knowledge about community change: Moving beyond evaluations.* Washington, DC: The Aspen Institute.

Bray, P. (2014). Parent Inquiry Initiative (parentii). Retrieved May 12, 2014, from http://www.hartford.edu/enhp/itr/cphep/parent_ii.aspx

Brown, P. (2012). Changemaking: Building strategic competence. *The Foundation Review, 4*(1), 81-93.

Brown, P., Chaskin, R., Hamilton, R., & Richman, H. (2003). *Toward greater effectiveness in community change: Challenges and responses for philanthropy.* Chicago: Chapin Hall Center for Children.

Campbell, E., lyons, H., & LaForgia, R. (2013). *Evaluating program impact: Our approach to performance assessment.* New York, NY: Rockefeller Brothers Fund.

Canada, T., & Bland, K. (2014). *Parents of young children: their perceptions of teacher quality and access to quality care.* Danbury, CT: Western Connecticut State University.

Connolly, P. M. (2008). *Maximizing foundation effectiveness: Aligning program strategy, organizational capacity, strategic planning, and performance assessment to achieve success.* New York, NY: TCC Group.

Darling, M. (2012). *A compass in the woods: Learning through grantmaking to improve impact.* Boston: Fourth Quadrant Partners.

Discovery website. (2014). Retrieved May 12, 2014, from http://discovery.wcgmf.org/

Dobkin-Hall, P. (2003). *A solution is a product in search of a problem: A history of foundations and evaluation research.* Cambridge, MA: Harvard University: Kennedy School of Government.

Easterling, D. (2012). Building the capacity of networks to achieve systems change. *The Foundation Review, 4*(2), 59-71.

Epstein Korten, A. (2009). *Change philanthropy: Candid stories of foundations maximizing results through social justice.* San Francisco, CA: Jossey-Bass.

Frusciante, A. (2009, November). *Structuring and supporting success in multi-community initiatives: Liaisons at the heart of an innovative engaged strategy.* Paper presented at the Association of Research on Nonprofit Organization and Voluntary Action, Cleveland, OH.

Frusciante, A. (2013). *Network learning inside out: A Pathways home institution case study.* Unpublished presentation. Hamden, CT: William Caspar Graustein Memorial Fund.

Frusciante, A. K. (2004). *An analytic case study of the evaluation reports of a comprehensive community initiative.* Unpublished doctoral dissertation, University of Maryland, College Park.

Fulbright-Anderson, K., Kubisch, A. C., & Connell, J. P. (Eds.). (1998). *New approaches to evaluating community initiatives: Theory, measurement, and analysis.* Washington, DC: The Aspen Institute.

Fulton, K., Kasper, G., & Kibbe, B. (2010). *What's next for philanthropy: Acting bigger and adapting better in a networked world.* San Francisco: Monitor Institute.

GEO. (2009). *Evaluation in philanthropy: Perspectives from the field.* Washington, DC: Grantmakers for Effective Organizations

GEO. (2013). *Four essentials for evaluation.* Washington, DC: Grantmakers for Effective Organizations

GEO. (no date). *Pathways to grow impact: Philanthropy's role in the journey.* Washington, DC: Grantmakers for Effective Organizations

GEO, & Jump. (2011). *Widespread empathy: 5 steps to achieving greater impact in philanthropy.* Washington, DC: Grantmakers for Effective Organizations.

Gopalakrishnan, S., & Preskill, H. (2011). Learning from an adaptive-consultative approach: One foundation's experience in creating systems change in education. *The Foundation Review, 2*(4), 119-132.

Hughes, M., & Goldenhar, D. (2012). Case study: Networking a city. *Stanford Social Innovation Review, 10*(3), 66-71.

Hugo, J. (2002). Learning community history. *New Directions for Adult and Continuing Education, 95*, 5-25.

Humphries, B., & Martin, M. (2000). Unsettling the 'learning community': from 'dialogue' to 'difference'? *Community, Work and Family, 3*(3), 279-295.

ISI --Innovations for Scaling Impactand Keystone Accountability. (2010). Next generation network evaluation. Seattle, WA.

Kilpatrick, S., Barrett, M., & Jones, T. (2003). *Defining learning communities.* Paper presented at the Australian Association for Research in Education: International Education Research Conference, Auckland, New Zealand.

Knutson, K., & Miranda, A. (2000). Leadership characteristics, social interest, and learning organizations. *The Journal of Individual Psychology, 56*(2), 205-213.

Kofman, F., & Senge, P. (2001). *Communities of commitment: The heart of learning organizations.* Cambridge: Organizational Learning Center, MIT.

Kremers, A. (2011). Use of layering for effective partnership building: Leveraging positive impact in education philanthropy. *The Foundation Review, 3*(3), 36-44. http://scholarworks.gvsu.edu/tfr/vol3/iss3/5/

Leiderman, S., & Studdiford, D. (2010). *Observing values in action: Stories and lessons from the work of the William Caspar Graustein Memorial Fund.* Conshohoken, PA: Center for Assessment and Policy Development

Lesser, E. L., & Storck, J. (2001). Communities of practice and organizational performance. *IBM Systems Journal, 40*(4), 831-841.

Letts, C. W., Ryan, W., & Grossman, A. (1997). Virtuous capital: What foundations can learn from venture capitalists. *Harvard Business Review, 75*(2), 36-44.

Lynn, E., & Wisely, S. (2006). Four traditions of philanthropy. In A. David & E.Lynn (Eds.), *The Civically Engaged Reader* (pp. 210-217). Chicago: Great Books Foundation.

Magno, C. (2010). *Learning communities and social capital and the William Caspar Graustein Memorial Fund: A descriptive case study.* New Haven, CT: Southern Connecticut State University.

Martinez-Cosio, M., & Rabinowitz Bussell, M. (2013). *Catalysts for change: Twenty-first century philanthropy and community development.* New York: Routledge.

McDermott, R. (2000). Knowing in Community: 10 critical success factors in building communities of practice. *International Association for Human Resource Information Management, 4*(1), 19-26.

McLeod-Grant, H. (2010). *Transformer: How to Build a Network to Change a System.* San Francisco: Monitor Institute.

Monitor. (2012). *Moving ideas into action: Reflecting on the first three years of building network effectiveness at the David & Lucille Packard Foundation* San Francisco: Monitor Institute.

Patrizi, P., Heid Thompson, E., Coffman, J., & Beer, T. (2013). Eyes wide open: Learning as strategy under conditions of complexity and uncertainty. *The Foundation Review, 5*(3), 50-65.

Peltonen, T., & Lamsa, T. (2004). Communities of practice and the social process of knowledge creation: Towards a new vocabulary for making sense of organizational learning. *Problems and Perspectives in Management,* 249-261.

Plastrik, P., & Taylor, M. (2010). *Network power for philnathropy and nonprofits.* Boston: Barr Foundation.

Preskill, H., & Beer, T. (2012). *Evaluating social innovation.* San Francisco: FSG , Center for Evaluation Innovation.

Putnam, K. (2004). *Measuring foundation performance: Examples for the field.* Oakland: California HeathCare Foundation

Rapson, R. (2008, April). *The fifth sector: Philanthropy's role in community change.* Guest Lecture at the College of Design - University of Minnesota.

Rivers, S. E., & O'Bryon, E. C. (2014). *Investigating processes through which families, school, and communities can collaborate to promote social and emotional skill development.* New Haven, CT: Yale Center for Emotional Intelligence

ROIVentures. (2008). *Knowledge to understanding.* Battle Creek, MI: W.K. Kellogg Foundation.

Schwab Foundation, C. a. H. (2004). *Employing knowledge management to improve performance: Six brief essays on lessons learned.* San Francisco, CA: Charles and Helen Schwab Foundation.

Senge, P. (2006). *The fifth discipline: The art and practice of the learning organization.* New York: Currency Doubleday.

Smith-Milway, K., & Saxton, A. (2011). The challenge of organizational learning. *Stanford Social Innovation Review, 9* (3), 44-49.

Stephens, S., & Studdiford, D. Discovery theory of change: Putting it all together. Retrieved May 12 2014, from http://www.discovery.wcgmf.org/discovery-theory-change-putting-it-all-together

Stephens, S., & Studdiford, D. (2013, November). *Early childhood advocacy and legislative climate: Analysis of patterns in Connecticut, 2007-2012*. Paper presented at the Association of Research on Nonprofit Organization and Voluntary Action, Hartford, CT.

Studdiford, D. (2014a). The Discovery timeline: An overview. Alexandria, VA: On Point Consulting

Studdiford, D. (2014b). Discovery Timeline: Systems building tab. Retrieved May 12, 2014, from http://www.discovery.wcgmf.org/sites/default/files/resources/Systems%20Dashboard.pdf

Twersky, F., & Lindblom, K. (2012). *Evaluation principles and practices: An internal working paper.* Menlo Park, CA: The William and Flora Hewlett Foundation

Wales, J. (2012). Framing the issue. In Advancing evaluation practices in philanthropy. *Stanford Social Innovation Review,* Supplement, 2-3.

Wei-Skillerman, J., Silver, N., & Heitz, E. (2013). *Cracking the network code: Four principles for grantmakers.* Washington, DC: Grantmakers for Effective Organizations

Weiss, H. B., & Lopez, M. E. (1999). *New strategies in foundation grantmaking for children and youth.* Harvard Family Research Project. Cambridge, MA.

Wenger, E. (2008). *Communities of practice: Learning, meaning, and identity.* New York: Cambridge University Press.

William Caspar Graustein Memorial Fund website. (2014). Retrieved May 12 2014, from http://www.wcgmf.org/

Williams Group. (2003). *Marketing your knowledge: A report to philanthropy's R&D organizations.* Grand Rapids, MI: Williams Group.

Angela Frusciante, Ph.D., *is knowledge development officer at the William Caspar Graustein Memorial Fund. Correspondence concerning this article should be addressed to Angela Frusciante, William Caspar Graustein Memorial Fund, 2319 Whitney Avenue 2B, Hamden, CT 06518 (email: afrusciante@wcgmf.org).*