



Organization-Wide Learning in Philanthropy

A Practical Guide for Foundations





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Introduction:

Why Organization-Wide Learning Matters for Foundations

The aspirations of philanthropic organizations to improve operations and effectiveness often fall short. Whether attempting to develop more effective diversity, equity, and inclusion practices, adopt a trust-based approach, disburse dollars more quickly with fewer restrictions, or any other number of initiatives, foundations are often criticized for the way they do (or don't) show up. While many factors contribute to a status quo performance, an often overlooked one is entirely within their own control: effective organizational learning.

Foundations have dedicated work to improve their learning for decades:

- **The names have varied:** Evaluation and Learning (E&L) departments; Monitoring, Evaluation, and Learning (MEL) units; Strategic Learning and Impact (SLI) teams; and many others.
- **The results:** Often underwhelming, performative and separate from data, out of sync with decision-making, and occurring in silos across the organization while excluding important external partners like grantees.
- **The good news:** There is a large body of research and emerging practice on organizational learning, some of which has been shared across the philanthropic sector.
- **The bad news:** The literature is expansive, making it hard to absorb when putting learning into practice, and few public examples exist of real-world application.

This paper addresses both of those challenges. We condensed the wide variety of organizational learning literature into specific practices, punctuating it with real-world examples, including eight case studies from prominent foundations. The focus is on organization-wide learning goals aimed at benefiting the entire organization and tied to the mission or macro strategy of the organization (as opposed to learning in specific program, issue, or operational areas). While more specific department or program learning matters—and can benefit from the framework and examples—greater attention needs to be placed on moving whole organizations, not pieces of organizations.



5 Core Benefits of Organization-Wide Learning



5 Core Benefits of Organization-Wide Learning

While having any learning practice is generally good, an organization-wide learning agenda weaves learning into the fabric of a foundation's culture, strategy, and operations, much like the way an organization's strategic plan provides overall direction.

The foundation case studies surfaced five core benefits of an organization-wide learning agenda:



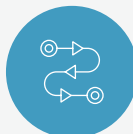
Creates strategic alignment across teams



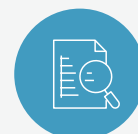
Enables a connection between learning and decision-making



Facilitates building organizational culture



Builds continuity between learning cycles



Enables development of structured inquiry with visible outcomes



1. Strategic alignment across teams

Foundations repeatedly noted that organization-wide learning helps reduce fragmentation and builds strategic coherence. Whether through cross-functional working groups, Learning Days, or shared reflections, these efforts help staff connect the dots across strategies, elevate shared priorities, and reduce duplication. Several foundations also described moments where learning surfaced field-wide themes, like capacity constraints, systems blind spots, or underleveraged actors, which influenced how strategies were framed internally.

Examples:

- Learning dialogues and working groups bring program teams together to examine common tensions across portfolios and explore collective responses ([Rockefeller Foundation](#)).
- Staff-level discussions of individual program evaluations to explore strategy gaps and opportunities that are pertinent across funding areas ([Winthrop Rockefeller Foundation](#)).



2. Connection between learning and decision-making

Organization-wide learning creates value when it supports timely, consequential decisions. Some foundations explicitly structure learning around strategic inflection points, such as the development of a new Theory of Change or when sunsetting a body of work. Others use learning to gather insights ahead of budgeting, board meetings, or strategy refreshes. Actively identifying alignment between learning and decision-making is a good marker of learning effectiveness, demonstrating success when the learning shows up in board memos, cross-team decisions, or strategy updates.

Examples:

- The Executive Team sets learning priorities based on upcoming decisions, and the Evaluation and Learning team aligns learning activities to those needs ([Packard Foundation](#)).
- Learning is tied to questions facing leadership, and post-decision session feedback is used to understand whether it is informing real decision-making ([Hewlett Foundation](#)).

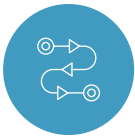


3. Cultivating culture—and not just learning culture

Several foundations emphasized the role learning plays in shaping internal culture. Organization-wide learning creates space for cultural attributes like reflection, humility, and inclusion. Foundations described shifts in how staff show up to conversations as well as a growing norm of curiosity, self-awareness, and experimentation.

Examples:

- Learning forums help normalize emergent practice and acknowledge complexity without fear of critique ([Democracy Fund](#)).
- Intentional staff onboarding and internal communications around learning promote shared language and expectations for how staff interact and explore ([Overdeck Foundation](#)).



4. Continuity between learning cycles

Many foundations reflected on the importance (and difficulty) of maintaining learning across transitions. Staff turnover, changing priorities, and shifting timelines often break learning cycles and lead to lost insights. An organization-wide learning agenda reduces the disruption of individual or divisional transitions by embedding learning at the organizational level. This happens through practices such as systemic learning infrastructure and better knowledge documentation and transfer.

Examples:

- Staff use quarterly check-ins and decision logs to revisit prior lessons and make learning more evergreen ([BHP Foundation](#)).
- A cross-functional Learning Council to shape content grounded in the realities of staff experience and a centralized learning repository ([Hewlett Foundation](#)).



5. Structured inquiry with visible outcomes

Organization-wide learning activities can be planned with clear goals or questions in mind, such as surfacing grantee experiences, improving exit strategies, or strengthening field capacity. This allows teams to consider whether the questions that framed the learning effort were answered, and if those answers led to changes in strategy or operations. While some organizations maintain flexibility in interpreting progress, others use light-touch tracking methods or structured after-action reviews to capture what was learned and how it was used. These intentional practices help ensure that learning investments deliver actionable insight.

Examples:

- Utilize learning agendas with outcome statements and revisiting them periodically to assess progress ([MacArthur Foundation](#)).
- Combine staff surveys with deliberate observation to understand learning value ([Rockefeller Foundation](#)).



From Organization-Wide to Community-Wide

A common critique of philanthropic learning practices is that while they prioritize internal foundation staff and board, what about grantees, community, and other partners? Organization-wide learning agendas, as evidenced by the name, generally limit their focus to the individual institutions, and while there is important value in that focus, it does create a critical learning gap: deliberate inclusion of partners, including grantees.

Having an “organization-wide” learning agenda doesn’t have to mean excluding stakeholders, but rather creates an opportunity to reflect on who is a part of your organization. Many of the foundations featured in the case studies have learning practices that are directed towards grantees and external sharing of insights, but these practices remain siloed rather than integrated.

Can we have both—organization-focused learning and grantee/community-inclusive learning? Here are some practices that can bridge the gap:

- ✓ **Include grantees/community representatives in the creation and/or review of the learning priorities.** Even if the learning is directed internally, this perspective helps inform what is important to learn about.

- ✓ **Expand the definition of “organization-wide” to include partners.** This reorientation can shift the overall dynamic of the work and create new ways of thinking about the organizational community, creating deliberate space at the learning table.

- ✓ **Be explicit about the way organization-wide learning is intended to benefit the broader work, including grant partners and communities.** Even if it remains internal, this focus will give it grounding.

- ✓ **Focus some questions on grantees and community.** Bringing this aspect under the organization-wide learning agenda purview reduces the cognitive distance between learning priorities and focus areas.

The 4-Component Framework for Organizational Learning



The 4-Component Framework for Organizational Learning

We developed the Organization-Wide Learning Ecosystem model by integrating various theories from the fields of organizational development, learning theory, and knowledge management. It draws on the foundational work of scholars such as David Kolb, Peter Senge, Chris Argyris, Ikujiro Nonaka, and Hirotaka Takeuchi, among others, who have contributed to the understanding of how organizations evolve, learn, and adapt over time.

Taken together, the model represents a holistic approach to thinking about organization-wide learning. There are four macro components that make up the learning ecosystem that need to operate in proportion and alignment:

LEADERSHIP AND GOAL ORIENTATION

1. Influenced by Senge's work on learning organizations and systems thinking, recognizes the role of leaders in guiding strategic learning and fostering a culture of reflection and adaptation.



STRUCTURED DEVELOPMENTAL LEARNING

2. Drawn from developmental psychology and organizational growth models (such as Tuckman's stages of group development and Greiner's organizational growth phases), focuses on structured pathways for staff and grantee development within organizations.



EXPERIENTIAL LEARNING

3. Rooted in Kolb's theory, emphasizes the importance of learning from experience and continuous feedback loops in informing decision-making.



KNOWLEDGE MANAGEMENT

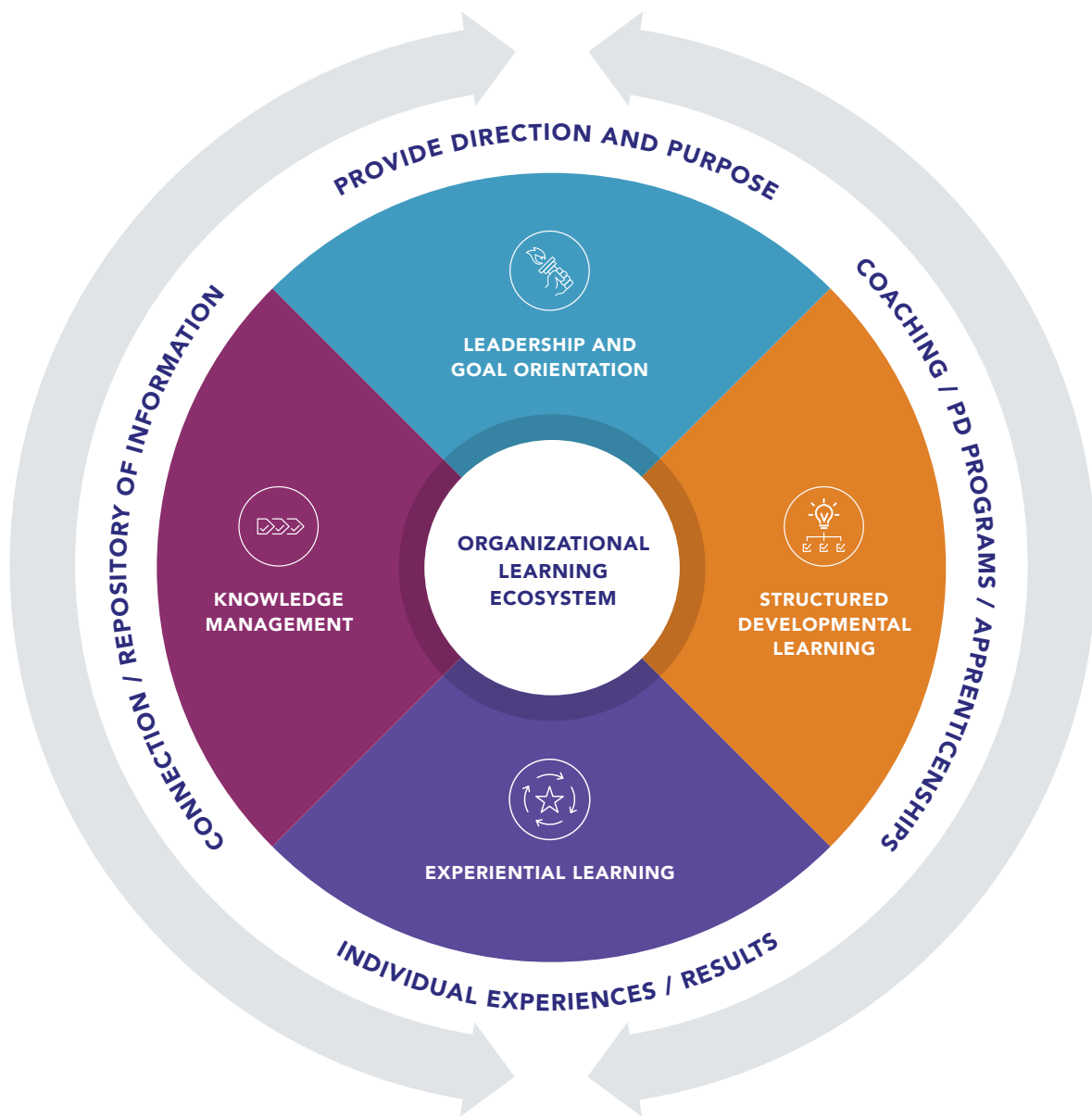
4. Building on the work of Nonaka & Takeuchi's SECI model, highlights how organizations create, share, and apply knowledge through systematic processes and collaborative learning environments.



By combining these diverse theoretical approaches, the Organizational Learning Ecosystem offers a comprehensive framework that addresses learning at multiple levels: individual, team, organizational, and systemic. It helps explain how organizations can cultivate learning environments that enhance adaptability, innovation, and long-term success by aligning learning practices. This model reflects the growing recognition in organizational literature that learning is not a singular process but a multifaceted, integrated approach that requires attention across all aspects of an organization. Many organizations focus on one or two of these but fall short of considering a holistic approach (see Figure 1).

FIGURE 1

TCC's Ecosystem for Organization-Wide Learning





1. Leadership and Goal Orientation

Derived largely from the managerial school of organizational theory, Leadership and Goal Orientation emphasizes strategic oversight by organizational leaders to shape and steer the learning agenda. Learning priorities are shaped in response to internal and external pressures such as market shifts, strategy adjustments, or community needs, with leaders setting direction and tone.

KEY COMPONENTS INCLUDE:

Leadership Driven

Leaders play a critical role in driving learning initiatives and aligning them with the organization's mission and long-term goals.



Strategic Learning Agendas

Leadership and learning teams identify external and internal learning needs and develop structured initiatives to address them.



Change Management

Learning is often tied to strategic change efforts, where leadership introduces new systems, policies, or frameworks to guide organizational adaptation.



Leadership and goal orientation aspects of learning ensure that learning efforts are aligned with the broader vision of the organization and support continuous adaptation to external changes. It is particularly common in sectors facing rapid innovation, regulatory changes, or shifts in community priorities.



The [David and Lucile Packard Foundation](#) showcases an example of this. Their executive team drives the Foundation's learning agenda by identifying consequential upcoming decisions and commissioning discrete learning projects to inform them. These projects are managed by the decentralized Evaluation and Learning team, with oversight from the Chief Learning Officer. This approach ensures decision relevance and transparency at the leadership level and strengthens the connection between learning and executive decision-making.



At the [Winthrop Rockefeller Foundation](#), the President and CEO plays an active role in advancing learning by modeling reflective practices, embedding learning into her own work, and ensuring it is resourced in the organizational budget. The Foundation's board also participates in annual learning activities, reinforcing that learning is a responsibility shared across all levels of leadership.

KEY THEORISTS:

PETER SENGE / JOHN P. KOTTER / KURT LEWIN

ORGANIZATIONAL LEARNING CHECKLIST

Turn Insights into Actions as You Read



How to Use This Tool: Pause after every section and complete the checklist. The questions reflect the practices commonly used by foundations that are strong in each component. Use it to pinpoint strengths, gaps, and next steps to strengthen your foundation's learning ecosystem.

LEADERSHIP AND GOAL ORIENTATION FOR LEARNING

YES

NO

- | | YES | NO |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| 1. Does your organization have a clearly articulated and strategic purpose and plan for learning? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Is your executive team actively involved in shaping the foundation's learning agenda, aligning it with strategic goals and upcoming decisions? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Are learning priorities set at the leadership level, based on organization-wide needs (e.g., equity goals, strategic shifts, program sunsets)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Does leadership champion learning by participating in or sponsoring learning initiatives (e.g., executive-sponsored learning series, leadership retreats)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Are staff aware of the specific learning goals for the organization? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Do cross-functional leadership structures (e.g., learning councils, strategy groups) help reinforce and guide the organization-wide learning vision? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Are learning moments or insights tied to tangible follow-up (e.g., changed priorities, resourcing decisions, or revised strategies)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Does your foundation track how learning activities support executive decision-making over time? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Are staff aware of how leadership uses learning to inform decision-making (e.g., through updates, board memos, or leadership reflections)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Have you incorporated grantee/community insights into the purpose and plan for learning? | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Have you considered how to deliberately support grantee/community learning as part of the overall purpose and plan for learning? | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Is your board given a clear purpose for learning that is directly tied to upcoming strategic or policy decisions? | <input type="checkbox"/> | <input type="checkbox"/> |



2. Structured Developmental Learning

Derived largely from the developmental school of organizational theory, Structured Developmental Learning focuses on incremental and organized growth for individuals, teams, and organizations. It involves setting up formal learning pathways, training programs, and capacity-building initiatives to ensure that development happens systematically.

KEY COMPONENTS INCLUDE:

Learning Stages

Staff or teams progress through well-defined stages of development, with targeted learning goals for each stage (e.g., onboarding, skill-building, leadership development).



Capacity Building

Organizations invest in the structured growth of their staff, ensuring acquisition of necessary skills.



Mentorship and Coaching

Formal programs provide ongoing support and guidance as staff move through their professional development journey.



Organizations that excel in structured developmental learning emphasize concrete opportunities such as workshops, certifications, or leadership programs. This approach is particularly important in sectors where ongoing change and adaptation require staff to acquire new skills to maintain high performance.



[The MacArthur Foundation](#) reinforces developmental learning by creating a predictable schedule throughout the year, and repurposing existing staff gatherings—like board preparation meetings—into structured learning events. Its Program Officer Community of Practice also offers quarterly, lightly structured peer discussions designed to build staff capacity in a safe and supportive environment.



[The Hewlett Foundation](#) has created a brand for its organizational learning: Hewlett University. They offer a suite of formal learning supports, including Learning Days, mentorship programs, and onboarding activities, which reinforce organizational values and foster cross-team connections. These activities help staff navigate the foundation's strategic framework while encouraging adaptation to new priorities over time.



[The Overdeck Family Foundation](#) follows a similarly structured model. Each year, its Strategy, Impact, and Learning (SIL) team works with program staff to co-develop a formal learning agenda. These agendas define learning questions linked to relevant data sources and specify follow-up actions based on findings. Insights from learning activities are reviewed alongside strategic planning to shape future directions.

KEY THEORISTS:

BRUCE TUCKMAN / LAWRENCE E. GREINER / CHRIS ARGYRIS / JEAN PIAGET

ORGANIZATIONAL LEARNING CHECKLIST

Turn Insights into Actions as You Read

STRUCTURED DEVELOPMENTAL LEARNING		YES	NO
1.	Do you have formal structures such as Learning Days, internal trainings, or workshops to build staff competencies?	<input type="checkbox"/>	<input type="checkbox"/>
2.	Are learning opportunities planned and sequenced over time rather than as one-offs or ad hoc?	<input type="checkbox"/>	<input type="checkbox"/>
3.	Are learning events curated using effective practices for adult learning, including accommodating multiple learning styles?	<input type="checkbox"/>	<input type="checkbox"/>
4.	Do learning events focus on practical, role-relevant skills?	<input type="checkbox"/>	<input type="checkbox"/>
5.	Are onboarding and mentorship programs designed to orient new staff to organizational learning values and expectations?	<input type="checkbox"/>	<input type="checkbox"/>
6.	Does your organization encourage staff to participate in professional associations, communities of practice, or conferences?	<input type="checkbox"/>	<input type="checkbox"/>
7.	Do staff have access to professional development resources (e.g., stipends, travel funds, certifications)?	<input type="checkbox"/>	<input type="checkbox"/>
8.	Are evaluations or debriefs conducted after structured learning sessions to improve future offerings?	<input type="checkbox"/>	<input type="checkbox"/>
9.	Are learning offerings coordinated by a dedicated team or learning lead to ensure consistency and relevance?	<input type="checkbox"/>	<input type="checkbox"/>
10.	Does your learning agenda have name recognition and visibility across the organization?	<input type="checkbox"/>	<input type="checkbox"/>
11.	Do learning events have deliberate follow-up support and/or engagements that are designed to reinforce content?	<input type="checkbox"/>	<input type="checkbox"/>
12.	Do your learning events consider how to best incorporate grantee/community engagement and insights?	<input type="checkbox"/>	<input type="checkbox"/>
13.	Does the board have a formal mechanism for learning (e.g., a learning committee, scheduled learning sessions, defined assignments)?	<input type="checkbox"/>	<input type="checkbox"/>



3. Experiential Learning

Derived largely from the economic school of organizational theory, Experiential Learning focuses on using real-world experiences to drive improvements. While many organizations claim that experiential learning is implicit in what they do, organizations that engage in effective experiential learning do so explicitly. They build regular reflection into the natural cadence of the work, call attention to learning when and where it happens, and encourage systematic examination of successes and failures, using insights as a foundation to refine strategies, processes, and decision-making.

KEY COMPONENTS INCLUDE:

Feedback Loops

Organizations use feedback from ongoing projects and operational performance to continuously adjust their approaches.



Data-Driven Learning

Metrics and performance indicators are captured and analyzed to inform future actions.



Trial and Error

Learning happens through experimentation, allowing organizations to pivot and innovate based on what they discover through hands-on practice.



Organizations successfully practicing experiential learning aim to optimize performance by embedding learning into the daily routines of individuals, teams, and departments. This approach is common in sectors where adaptability, innovation, and collaboration are crucial.



[The Democracy Fund](#) weaves learning into everyday rhythms through activities like team “vibe checks” and structured reflection during retreats, supporting timely, collective interpretation of emerging dynamics and strengthened alignment across staff.



[The Rockefeller Foundation](#) hosts strategy dialogue sessions—facilitated peer exchanges designed to support honest, non-performative reflection on complex challenges. These sessions allow for cross-team learning and promote real-time adjustment.



[The Winthrop Rockefeller Foundation](#) uses emergent “learn-do” cycles in which teams apply insights to ongoing strategy and grantmaking work. Drawing on tools like appreciative inquiry and design thinking, the Foundation creates reflective spaces that allow staff to rapidly interpret what’s unfolding and respond adaptively. These informal yet intentional routines help ensure that sense-making and strategic adjustment are not isolated events, but part of an ongoing experiential learning culture.

KEY THEORISTS:

DAVID KOLB / JAMES G. MARCH / HERBERT A. SIMON / CHRIS ARGYRIS / DONALD SCHÖN

ORGANIZATIONAL LEARNING CHECKLIST

Turn Insights into Actions as You Read

EXPERIENTIAL LEARNING	YES	NO
1. Are staff encouraged to reflect on and share what's being learned through program implementation, grantmaking, partnerships, or funding practices?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do teams hold regular after-action reviews, post-mortems, or learning debriefs following key initiatives, milestones, or decisions?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are there low-stakes opportunities for staff to explore and test ideas (e.g., pilot programs, internal labs, innovation grants)?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are staff encouraged to take reasonable risks with grantmaking?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do learning efforts create space to explore failures, missteps, or unexpected outcomes?	<input type="checkbox"/>	<input type="checkbox"/>
6. Are staff encouraged to take reasonable risks?	<input type="checkbox"/>	<input type="checkbox"/>
7. Are staff reflections or grantee feedback integrated into team discussions, planning, or cross-functional learning moments?	<input type="checkbox"/>	<input type="checkbox"/>
8. Are learning insights captured from work in the field (e.g., site visits, listening sessions, convenings) and brought back to inform internal work?	<input type="checkbox"/>	<input type="checkbox"/>
9. Is there visible support for emergent or inquiry-driven learning, even if it does not tie to immediate strategic needs?	<input type="checkbox"/>	<input type="checkbox"/>
10. Have you identified ways that grantees/community might be part of feedback loops, generating data insights, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
11. Is learning built into board decision processes?	<input type="checkbox"/>	<input type="checkbox"/>



4. Knowledge Management

Derived largely from the process school of organizational theory, Knowledge Management refers to the systematic capturing, sharing, and application of knowledge within an organization, facilitating continuous learning and innovation.

KEY COMPONENTS INCLUDE:

Knowledge Capture

Organizations gather and store both explicit (codified) and tacit (experiential) knowledge from projects, research, and operations.



Knowledge Sharing

Processes are in place to ensure that knowledge flows freely between departments, teams, and individuals, preventing silos.



Knowledge Accessibility Systems

Organizations use knowledge management systems, databases, and collaborative platforms to make knowledge easily accessible and usable.



Organizations engaging in effective knowledge management focus on building a culture of right-sized documentation and systematization. It is particularly important in organizations that are large, with a dispersed workforce, or where knowledge is decentralized or siloed. It is also critical for organizations that have many external partnerships (such as grantees) to ensure a cohesive and consistent experience across all stakeholders.



[The BHP Foundation](#) has a more structured knowledge management approach, maintaining a centralized 'learning bank' for institutional memory. It's supported with short, action-oriented learning memos created after "Learning Huddles" that follow a "what, so what, now what" format and are used to guide decision-making, including at the board level.



[The Overdeck Family Foundation](#) also fosters internal knowledge flow through structured systems. Staff use Slack channels to disseminate timely insights, apply grant tagging to surface patterns, and include a formal reflection section in year-end reports.

KEY THEORISTS:

IKUJIRO NONAKA / HIROTAKA TAKEUCHI / THOMAS H. DAVENPORT / LAURENCE PRUSAK
GEORGE P. HUBER / ETIENNE WENGER

ORGANIZATIONAL LEARNING CHECKLIST

Turn Insights into Actions as You Read

KNOWLEDGE MANAGEMENT FOR LEARNING		YES	NO
1.	Do you have centralized systems for storing and retrieving knowledge (e.g., internal knowledge libraries, digital archives, learning repositories)?	<input type="checkbox"/>	<input type="checkbox"/>
2.	Are learning insights documented consistently across teams and functions?	<input type="checkbox"/>	<input type="checkbox"/>
3.	Are there processes in place to ensure continuity of knowledge during staff transitions (e.g., onboarding, offboarding, role handovers)?	<input type="checkbox"/>	<input type="checkbox"/>
4.	Do leaders encourage staff and teams to share knowledge and insights with other staff/teams?	<input type="checkbox"/>	<input type="checkbox"/>
5.	Is documentation user-friendly and synthesized (e.g., through summaries, tagged insights, decision logs)?	<input type="checkbox"/>	<input type="checkbox"/>
6.	Are past insights easily accessible and routinely revisited to inform new strategies or decisions?	<input type="checkbox"/>	<input type="checkbox"/>
7.	Are learning leads or strategy officers responsible for curating and maintaining institutional knowledge?	<input type="checkbox"/>	<input type="checkbox"/>
8.	Is knowledge management integrated into daily workflows (e.g., through meeting templates, grant reviews, or check-ins)?	<input type="checkbox"/>	<input type="checkbox"/>
9.	Do you track whether knowledge products (e.g., learning briefs, slide decks) are being accessed or applied?	<input type="checkbox"/>	<input type="checkbox"/>
10.	Are staff incentivized or rewarded for sharing knowledge?	<input type="checkbox"/>	<input type="checkbox"/>
11.	Are there specific approaches created for sharing learning with grantees/community?	<input type="checkbox"/>	<input type="checkbox"/>
12.	Does the board receive concise, decision-relevant learning syntheses (e.g., "what, so what, now what" memos) when given a project update or summary at the close of a grant cycle?	<input type="checkbox"/>	<input type="checkbox"/>

FROM OVERSIGHT TO LEARNING PARTNER:

The Board's Role in the Learning Ecosystem

Is your board getting left behind in your organization's learning? Boards are complex and face a number of challenges when confronting learning.¹ While there aren't any magic learning wands to wave, there are a few lessons that can improve board learning conditions:

- ✔ **Ensure there is a reason to learn** (Leadership and Goal Orientation). Consider this familiar scenario: You tell the board you want them to embrace learning, but then your board meeting is designed with the assumption that staff already have all the answers. Boards don't need a generic understanding of learning; they need a clear purpose. And this purpose should not be totally distinct from the rest of the organization. For example, [Democracy Fund's](#) annual learning report serves as a board-level sense-making tool connected to strategy.

- ✔ **Create a formal structure** (Structured Developmental Learning). Assignments generate action. This could look like a specific committee of the board tasked with learning; scheduled board learning activities; and board learning assignments. For example, [Winthrop Rockefeller Foundation](#) established a learning committee of the board to guide the learning agenda, and the board participates in annual learning-focused meetings that include core skill development tied to systems change—a priority for the organization.

- ✔ **Start with action** (Experiential Learning). Many efforts to build board learning start with the premise that they need to convince the board what it is and why it is important. This philosophical approach falls short in the face of "real" work that must be done. Instead, start learning by building it into the work process. For example, use before- and after-action reviews around key board decisions, frame up either/or scenarios, and provide research that shows different implications of decisions.

- ✔ **Provide usable information** (Knowledge Management). Boards are busy and unlikely to consume large amounts of "extraneous" information. Board learning needs to prioritize sharing information that is useful at a given time and being able to access historical insights when they are newly relevant. For example, at [BHP Foundation](#), board-level synthesis is a formal component of the learning system: learning memos following Learning Huddles use a "what, so what, now what" format and are reviewed by the board, and learning progress appears as a standing indicator on the board scorecard.

¹ Preskill et al. (2019). *Engaging Boards and Trustees in Strategic Learning: A Toolkit*. FSG and GEO.



4 Common Obstacles to Organizational Learning

(And What to Do About Them)



4 Common Obstacles to Organizational Learning (And What to Do About Them)

While the foundations we interviewed all value organization-wide learning, they recognize that there are several persistent challenges in embedding and sustaining these efforts. These challenges often reflect tension between intention and implementation, and create barriers to application, consistency, measurement, and equally distributed knowledge sharing.

1. BRIDGING INSIGHT AND ACTION

1.

Several foundations noted the difficulty of ensuring that insights from learning efforts translate into strategic or operational decisions. One foundation staff member shared that while learning was embedded in team rhythms and generated valuable real-time insights, those insights didn't always reach decision-makers or influence major shifts. Another foundation similarly indicated that sometimes "learning just stops" at documentation.

2. MAINTAINING ENGAGEMENT AND CONTINUITY

2.

Struggles in sustaining learning efforts over time were also common. At one foundation, staff described how participation in learning workgroups fluctuated and required strong internal champions to persist. Another foundation noted that when learning practices aren't well-integrated into existing workflows, they risk being sidelined, especially when learning is perceived as a "nice to have" rather than essential amid competing and more immediate priorities. One foundation staff member cited the "fragility" of learning efforts, explaining that momentum could stall when energy from a facilitator or senior leader wasn't sustained.

3. MEASURING PROGRESS AND DEMONSTRATING VALUE

3.

While each have their own methods of finding and determining value, many foundations shared that actually assessing and documenting it was challenging. One foundation indicated that the influence of learning is often indirect, diffused, and realized later. This leads to difficulty in evaluating how learning influenced decision-making, with the foundation noting that while they had learning agendas and tracked participation, assessing actual impact on strategy of programs was more ambiguous. Similarly, another foundation expressed concern that there was "no good way of understanding the return" on their internal learning efforts.

4. OVERCOMING STRUCTURAL AND CULTURAL BARRIERS

4.

Silos and cultural norms at some foundations also hinder learning. One foundation noted that despite having a supportive learning infrastructure, siloed teams sometimes led to limited knowledge sharing. Another foundation described how learning insights might remain localized unless proactive steps were taken to distribute them across the organization. Finally, issues of regional contexts were highlighted for a more internationally-focused funder who described balancing global learning with centralized knowledge against localized nuance.

Proven Strategies for Overcoming Implementation Barriers

TYPE OF CHALLENGE	SPECIFIC CHALLENGE	WHAT YOU CAN TRY
Bridging Insight and Action	Learning activities not linked clearly enough to upcoming or active decisions	<ul style="list-style-type: none"> • Center learning on time-bound questions that directly inform strategic or programmatic decisions • Use check-ins to decide what advances and clarify next steps • Document how insights are used in decisions, documents, or meeting agendas
	Difficulty translating learning into implementation plans or actions	<ul style="list-style-type: none"> • Build simple action into learning sessions • Assign owners and deadlines for follow-up • Include implementation prompts in debriefs and leadership discussions
Maintaining Engagement and Continuity	Staff time constraints reduce ability to engage in learning opportunities	<ul style="list-style-type: none"> • Prioritize dedicated Learning Days to reduce scheduling conflicts • Signal through leadership messaging that learning is a strategic priority to reduce sense of optionality • Embed learning into existing meetings and processes so that it is part of day-to-day activity
	High turnover disrupts continuity and learning momentum across teams	<ul style="list-style-type: none"> • Assign learning leads to carry forward insights across cycles • Embed key learnings into onboarding and role transitions • Create a central repository of distilled, actionable insights
Overcoming Structural and Cultural Barriers	Learning agendas may become overly rigid or too vague, reducing relevance	<ul style="list-style-type: none"> • Design core and optional components in learning agendas to allow flexibility • Engage a diverse learning committee and regularly refresh learning questions based on organizational need • Use multiple formats (e.g., salons, deep dives) to serve diverse learning preferences
	Lack of clarity about expectations for participation in structured or emergent learning activities	<ul style="list-style-type: none"> • Communicate expectations and value of participation through leadership messaging • Offer choice-based options within structured agendas (tracks, formats) • Facilitate peer-led learning to build bottom-up engagement
Measuring Progress and Demonstrating Value	Learning is not always visibly integrated into strategic documents, board memos, or resource allocations	<ul style="list-style-type: none"> • Include learning insights in leadership team and board memos • Document examples of how learning influenced strategy or budget choices • Align learning topics with near-term decision cycles whenever possible



From Theory to Practice: 8 Foundation Learning Approaches

- [BHP Foundation](#)
- [David and Lucile Packard Foundation](#)
- [Democracy Fund](#)
- [John D. and Catherine T. MacArthur Foundation](#)
- [Overdeck Family Foundation](#)
- [Rockefeller Foundation](#)
- [William and Flora Hewlett Foundation](#)
- [Winthrop Rockefeller Foundation](#)



From Theory to Practice: 8 Foundation Learning Approaches

Organization-wide learning agendas hold a lot of promise for improving the way that organizations operate by creating a shared practice and making it harder for learning to exist as a background “nice to have” rather than a core way of working. This approach to learning won’t solve all the problems associated with philanthropy, but it can help shorten learn-do cycles and move concepts from theory to practice.

What follows are eight case studies of foundations that have implemented various forms of organization-wide learning agendas. Each case study has a general introduction, followed by specific learning components and highlighting a couple of interesting promising practices. Each case study ends with a “Learning to Learn” nugget from that organization. While organizations use different terminology, we have aligned common practices to ensure consistency across cases. These case studies are not intended to showcase “best practices”, but to illustrate a range of possibilities and provide practical examples that others can draw from. Although the organizations profiled continue to evolve their learning practices, we are presenting the case studies in the present tense for clarity and readability. We are grateful to each organization for sharing their organization-wide learning approach.



[BHP Foundation](#)

The David and Lucile
Packard Foundation

[The David and Lucile
Packard Foundation](#)



[Democracy Fund](#)

MacArthur
Foundation

[MacArthur Foundation](#)



[Overdeck Family
Foundation](#)



[The Rockefeller
Foundation](#)

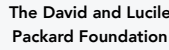














[William and Flora
Hewlett Foundation](#)



[Winthrop Rockefeller
Foundation](#)

Case Study Snapshots

A GOOD STARTING POINT FOR...	KEY COMPONENT	FOUNDATION
Informing Decisions in Real Time	Learning questions are explicitly framed around upcoming strategic or operational decisions	
	Executive leadership sponsors and prioritizes learning questions tied to decision cycles	
	Staff time constraints reduce ability to engage in learning opportunities	
Facilitating Organization-Wide Collaboration	Cross-functional learning is organized around shared institutional questions rather than program updates	
	Leadership legitimizes collaboration by allocating time and signaling its strategic value	
	Facilitated sense-making emphasizes joint problem-solving over reporting	
Maintaining Engagement and Continuity	Explicit ownership is assigned for carrying learning forward across cycles and transitions	
	Learning outputs are synthesized and revisited to inform new work	
	Onboarding surfaces prior learning, strategic context, and key decisions	
Embedding Equity into Learning Practices	Equity insights are intentionally integrated into strategy development and funding decisions	
Measuring Progress and Demonstrating Value	Learning effectiveness is assessed through use-based indicators (e.g., influence on decisions, alignment, practice change)	
	Reflection and feedback are embedded into learning activities to adapt future learning design	
Sustaining Institutional Knowledge	Centralized repositories are used to capture learning artifacts and decision rationales	



KEY STATS

CURRENT STAFF:	~20
ANNUAL GRANTMAKING:	~\$55M
MAJOR PROGRAM AREAS:	3

The BHP Foundation, the corporate foundation of BHP, includes organizational learning among its core values and prioritizes learning to maximize the adaptiveness of its work. The Foundation’s learning approach is outlined in a formal learning policy and is a fundamental component of how it measures success. Its organization-wide learning approach consists of three parts:

- 1 **Operational learning**, which focuses on whether programs are set up the right way and asking the right questions.
- 2 **Programmatic learning**, which examines how projects are unfolding.
- 3 **Board-level synthesis of organizational learning**, which ensures Foundation-wide accountability for implementing the learning approach.

SPECIFIC LEARNING COMPONENTS

A Clear “Why” to Guide Learning

The Foundation’s learning approach is tied to the Foundation’s Measurement, Learning and Evaluation (MLE) Policy. It articulates four core reasons why leaders and staff want to learn (as well as external audiences), including:

- Sharing evidence to influence action
- Adaptively managing and course correcting to maximize impact
- Holding themselves accountable to stakeholders and commitments
- Contributing to an evidence base that substantiates the value proposition of their work

Codified Learning Approach

The Foundation maintains a clearly articulated policy for organizational learning that includes guidance about what to examine and how often, as well as broad “how to” parameters for learning. The policy creates an enabling environment for learning. While the Chief Impact Officer holds responsibility for developing a clear initial policy and the CEO holds responsibility for enforcing the policy (generating accountability across the organization), learning is the responsibility of every staff member.

Establish Pause and Reflect Moments

After reviewing learning research, Foundation leaders determined that they had to create regular, intentional, and structured opportunities for staff to stop, focus, and reflect on what they are learning. They determined that two to three opportunities each year would be appropriate and term these events “Cross-Program Learning Huddles.”

Documentation of Value and Application

The Foundation’s MLE team manages a “learning bank” that helps the organization track insights and identify uses of organizational learning. For example, following each Learning Huddle, the implementing team prepares a learning memo for the board. The memo describes what was learned (the “what”), why it is important (the “so what”), and how

the insights will be applied (the “now what”). The latter portion serves as the basis for a change management discussion around what the Foundation should stop, continue, and/or change. At the same time, sending the memo to the board serves an accountability function, creating the impetus for staff to use the information because they know it is on the board’s radar.

Learning Process Accountability

Learning is included as one of the FY24 business scorecard indicators that the Foundation’s board regularly reviews. However, this accountability indicator is oriented to process—i.e., creating space and carrying out learning activities—rather than content. This allows the learning itself to be organic and responsive to what is needed within the organization. Nonetheless, while staff are empowered to establish learning priorities, the learning questions they explore are concrete and tracked.

PROMISING PRACTICES

Learning Huddles

The BHP Foundation organizes two-to-three all-staff Learning Huddles each year. Each Huddle has a specific topic that is sourced through an all-staff survey, followed by staff voting to establish the top priorities. Using the “what,” “so what,” “now what” framing, a small team develops the structure for the Learning Huddle and identifies and develops relevant information (sometimes through hiring external consultants to “bring the outside in”). In addition, at least one of the annual Huddles includes board engagement.

Board Engagement in Learning

The Foundation’s board includes learning progress as a key performance indicator on their organizational scorecard, ensuring that it is prioritized by leadership and staff. In addition, per the Foundation’s MLE policy, the board itself is required to have at least one learning-focused conversation each year.

LEARNING TO LEARN LESSON



Clarify What You Mean by Learning

“You need alignment around what you mean by learning—what is in and what is out. And then you need to really establish the norms and behaviors that constitute your learning approach.”

— BHP Foundation

The David and Lucile Packard Foundation

KEY STATS

CURRENT STAFF:	~215
ANNUAL GRANTMAKING:	~\$350M
MAJOR PROGRAM AREAS:	4

The David and Lucile Packard Foundation’s approach to learning prioritizes decision relevance and timing, ensuring that insights are generated when they matter most. While the Foundation supports a variety of activities for general learning, it applies a strategic decision-making focus to learning activities that serve decisions at the Executive Team and grantmaking levels. The Foundation’s overall learning plan identifies timely, consequential questions that executive leadership is likely to face and creates a plan to gather learning insights to inform those questions. The learning plans at the grantmaking level focus on both strategic and operational questions anticipated by teams for their own use. Learning at Packard is pragmatic and intentional, aligning with the Foundation’s values of equity, systems thinking, and evidence-based strategy. The Foundation also supports grantee and field-level learning through investments in research, evaluation capacity, and grantee convenings.

SPECIFIC LEARNING COMPONENTS

Leadership-Determined Learning Agenda Foundation-wide learning is sponsored by the executive team and led by the Chief Learning Officer. Executive leadership identifies upcoming decisions that guide the learning agenda, and the Evaluation and Learning team, which is decentralized, implements it. Leaders actively shape the questions being asked and support transparency across the organization.

Grantmaking Team Learning Agendas Learning at the grantmaking level is sponsored by vice presidents responsible for those teams and led by embedded Evaluation and Learning Officers. Grantmaking teams anticipate the decisions they will be making at different points in the implementation of a grantmaking strategy. The Evaluation and Learning Officer supports design of data collection, evaluations, and systematic reflections.

Multiple Discrete Learning Projects Each learning question, whether at the executive team or grantmaking level, is tackled as its own project. Sometimes these learning projects are carried out by internal staff. In other instances, the Foundation contracts with external consultants to gather and analyze data and insights. This might be done through staff interviews and surveys, internal data (e.g., grant documents), and/or external primary or secondary data collection. Each project is managed by a learning officer who has responsibility for overseeing timing, design, and quality.

Focused Opportunities for Staff Input Staff who have direct oversight of activities related to a particular learning question are engaged around that particular learning question. At a Foundation-wide level, staff are kept informed of the foundation learning plan and what is coming next and opportunities to participate in consultations and conversations.

Selective Documentation

Because learning is tied to specific decisions, there is little need to preserve knowledge gathered through the process. However, when a question is likely to arise again in the future, the Foundation does produce a knowledge product. Each team at the Foundation also has a designated person who is responsible for knowing what is in the knowledge repository and helping their team link to those products when relevant.

PROMISING PRACTICES

Question-Driving Learning Agenda to Make Big Decisions

Getting leaders to concretely identify what strategic questions they are likely to have to answer in the future is central to the process. The leadership team goes through an iterative process to identify priorities and elaborate empirical strategies for learning. Leaders must be curious and open to insights gained through the learning process so they are prepared to make big decisions. This process also creates transparency for others in the Foundation around the executive team's agenda. Because it is clearly established as a learning agenda, it has helped leaders keep an open mind when it comes time to make a decision. This works to combat confirmation bias, likely leading to better data-informed decision-making.

Just-in-Time Learning

The discrete learning projects identified by the executive team are designed and executed to help these leaders have all of the knowledge they need when a specific decision is imminent. This focus on timely and targeted learning ensures that they have the bandwidth to focus on and absorb critical context and insights and immediately apply the insights.

LEARNING TO LEARN LESSON



Start with Decisions

"I've seen lots of cross-foundation learning activities—brown bags and in-town weeks and such. It is interesting and fun and great for community building, but I never saw any application of what we were exposed to. I think really focusing a large share of time and money on doing good decision-making for impact is more valuable than spending on a broad learning agenda. This requires a leader that is open to transparency around key decisions."

— David and Lucile Packard Foundation



KEY STATS

CURRENT STAFF:	~60
ANNUAL GRANTMAKING:	\$60-70M
MAJOR PROGRAM AREAS:	3

Democracy Fund grounds its organization-wide learning in organizational strategy, working to ensure that learning is clearly tied to decision-making. The goal is to help the organization ask hard questions about its programs and clearly communicate between individuals and groups—not just whether programs are working, but whether they are the right programs to be prioritized at a given time and whether they are generating enough benefit to make a difference in the system. Implementation of the learning approach is still a work in progress.

SPECIFIC LEARNING COMPONENTS

Focus on Organizational Strategy For several years, Democracy Fund had robust learning agendas for its individual programs. This led to underwhelming learning results, which were often more theoretical than practical. In response, they developed an organization-wide learning approach grounded in the organization’s three overarching strategic focus “legs.” While still a work in progress, each leg aims to have a specific learning agenda that centers on decisions that teams have to make about their work. Team learning now increasingly focuses on questions such as the extent to which initiatives are making progress toward intended outcomes and whether the initiatives are being implemented effectively. Organization-level learning addresses questions such as the extent to which initiative-level outcomes are ladder up to progress towards the organization’s mission and whether the world is getting closer to the organization’s vision. Responsibility for organization-wide learning sits with the executive leadership team comprised of the President, Vice President, and Chief Operating Officer.

Communities, Vibe Checks, and Annual Learning Retreats Democracy Fund uses a series of formal and less formal activities as part of its organization-wide learning practice. It supports an annual learning season, starting in the fall and continuing through the first quarter’s board meeting. The season draws from year-round learning engagements with and from grantees, and is capped by a learning retreat which leverages portfolio reviews and other activities to curate common themes, orient staff to the strategy, and create a shared sense-making experience for staff across all departments. In addition, the organization maintains communities of practice tied to the organization-wide strategy (see below). Rather than over-emphasizing quantitative indicators, evaluations, and other traditional data collection, the organization is also experimenting with “vibe checks,” through which staff are asked to draw on the full range of their experience to reflect on whether things are getting better or worse on their focus issues, and identifying what signals might be driving that impression.

Identify External Indicators of Systems Change Democracy Fund has identified approximately 100 system-level indicators—generally from public data sources or existing research projects—related to their strategic work around the health of democracy. These indicators are not tied to individual program strategies

and instead provide perspective on how democracy is doing. Rather than updating a dashboard or report with this data in a rote way, the organization as a whole engages with them through the learning retreat, lunch & learns, and program team learning sessions—exploring what the data means and how they need to adapt and respond to system changes. This affords the entire organization a shared, high-level perspective to ground their work.

Learning is Focused on Increasing Alignment between Individuals and Groups, not Definitively Answering Questions

Democracy Fund focuses on using learning practices as a means of ensuring shared understanding between various key stakeholders. Effective learning practices help board, leadership, and staff more clearly formulate and communicate their mental models, assumptions, and aspirations, laying the groundwork for more shared understanding as a path towards more effective decision-making. Ideally, this helps the organization understand trade-offs and facilitate collaboration that amplifies impact.

Annual Learning Report

One effort to bridge programmatic silos and explore the mutually reinforcing nature of Democracy Fund’s programs is its annual learning report, which is a summative readout of the Learning Retreat and covers learning and impact around each leg of the strategy. The report, which is shared with Democracy Fund’s board, includes short impact stories and evolves each year as the team identifies the most important learning to lift up and the most effective ways to communicate that information.

PROMISING PRACTICES

Communities of Practice

Democracy Fund maintains one community of practice for each leg of its organization-wide strategy. The communities of practice bring staff from different program areas together to strategize and learn. They started out somewhat informally and have evolved as staff see greater value in dedicating time to them and leadership has elevated a focus on contribution at the level of organization-wide strategy rather than smaller grantmaking initiatives and portfolios. Activities include information sharing, peer coaching, learning discussions, co-strategizing and co-creation of monitoring and evaluation frameworks. The communities of practice are managed and facilitated by the Strategy Impact and Learning Team, which is also responsible for curating the learning agenda. An anticipated next step is for each community to establish shared indicators and learning questions tied to those indicators.

LEARNING TO LEARN LESSON



Don't Over-Focus Learning on Things that Don't Advance the Work

“When you use the term learning in the broad sense, we ‘over-index’ on a concept that is not grounded in strategy. Articulating the organization-level strategy unlocked organization-level learning and created the container for it.”

— Democracy Fund

MacArthur Foundation

KEY STATS

CURRENT STAFF:	~200
ANNUAL GRANTMAKING:	~\$300M
MAJOR PROGRAM AREAS:	11

The John D. and Catherine T. MacArthur Foundation typically follows a bottom-up approach to learning, supporting staff to address emergent needs. The Foundation established learning as one of its five core values. Although it does not currently have a formal organization-level learning agenda, it has learning agendas at the program level or around particular initiatives. In practice, MacArthur’s learning agenda is expansive and responsive, while also trying to facilitate convergence and collaboration across the organization. It blends internal reflection with external learning, often in the form of independent evaluations that are shared broadly.

SPECIFIC LEARNING COMPONENTS

Distributing Learning Content and Ownership

The Foundation has a Learning Officer as well as two Evaluation Officers, each of whom are positioned within the evaluation department for ensuring that learning is prioritized across and within programs and organizational initiatives. Staff drive and shape learning agendas through crowdsourcing and co-design (not just providing ideas for topics), which increases staff engagement and organizational relevance. The Office of the President hosts some learning activities and gives them greater prominence. Leadership does work to ensure that learning is embedded in culture and strategy and not just events.

Creating Time for Learning and Staff Leadership

The MacArthur Foundation has adopted a couple of approaches to help staff make the time for learning. First, the Foundation looked at how it could reallocate existing spaces rather than creating new ones. For example, board preparation meetings already existed, but were being underutilized because people didn’t have clarity on the board process and the decisions that would be made. By arranging “Discourse Sessions” (see below) around board meetings, it provided a clear purpose for the learning. Second, the Foundation creates predictability for some learning opportunities or series by scheduling out learning sessions for the entire year at the beginning of the year, rather than having them pop onto calendars ad hoc over the course of the year.

Documentation of Learning

MacArthur employs documentation strategies to support learning, including the development of summaries and brief recordings from community of practice sessions (see below). They also share their approach to evaluation and learning and results on their website. However, the Foundation deliberately doesn’t document and share everything outside of a learning space. Some learning conversations are considered private so as to provide a psychologically safe space to learn.

PROMISING PRACTICES

Discourse Sessions

MacArthur's Discourse Sessions are held four-to-seven times a year. These sessions increase awareness around current and relevant program and department work by providing a space for feedback and reflection. The sessions are organized around staff presentations followed by opportunities for questions and feedback. For example, discourse sessions have started with previewing a board presentation, a deep dive on a particular initiative, and a project a staff member proposes, to name a few. While they are optional, the sessions have a level of formality and structure stemming from their consistency and the fact that they are sponsored by the Office of the President. To generate buy-in and relevance, two-thirds of the sessions are built from staff crowdsourcing, and at least one non-evaluation staff member takes ownership for helping to design the agenda.

Program Officer Community of Practice (CoP)

The Foundation has set up the CoP as a structured venue for program officers to engage in conversation about topics of cross-cutting importance. It is meant to be a safe space for dialogue on aspects of program officers' work where they would benefit from sharing learnings across teams. For example, one recent meeting examined what it means to be in philanthropy and do your work with humility. The CoP meets quarterly, and the topics emerge based on practice needs. Rather than it being a strictly open conversation, most CoP meetings begin with program officer(s) delivering light-lift reflections or a brief presentation with guiding questions (itself a learning opportunity), which may be recorded, followed by an open staff conversation, which is not recorded.

LEARNING TO LEARN LESSON



Create Learning Moments Incrementally

"You can't only look for windows of opportunity. Sometimes you need to inch the window open bit by bit by doing intentional active listening to develop the initial design and efforts—you don't go big right off the bat."

— MacArthur Foundation



KEY STATS

CURRENT STAFF:	~20
ANNUAL GRANTMAKING:	~\$65M
MAJOR PROGRAM AREAS:	4

Learning is a core strength of Overdeck Family Foundation, and one of its three core organizational values is “learn better, together.” The role of the organization-wide learning agenda is to create structure, focus, and accountability to harness that strength and guide choices about how to use time and resources.

SPECIFIC LEARNING COMPONENTS

Yearly Strategy Planning

At the end of each year, the Foundation goes through a strategy development process for the upcoming year. During this process the Strategic Impact and Learning (SIL) Team identifies themes and commonalities across portfolio and department strategy memos which it uses to generate a draft learning agenda with questions that can be programmatic and/or related to organizational effectiveness. SIL shares the draft agenda and solicits input from the team, usually at the first all-staff meeting in January, before finalizing it. Having the SIL team do the cultivation work reduces the cognitive load for other staff, making learning more accessible. Questions do not have to apply to everyone in the organization but must be seen as pertinent and timely for multiple staff.

Ambassadors for Learning Questions

The SIL Senior Director has ultimate responsibility for creating the conditions for learning, but building shared ownership across the team is a key to success. The Foundation asks staff to volunteer to serve as an ambassador for a specific learning question in order to steward logistics and ensure that learning activities are accomplished.

Success Defined by Relevance and Application

The Foundation tracks actions on its learning agenda on a rolling basis. It shares quarterly updates with all staff about both what and how learning progressed related to each learning question. The Foundation considers learning to be meaningful when it is relevant and actionable. To assess this, the Foundation surveys its team twice a year about the extent to which learning has been timely, relevant, and applied. It also uses these semi-annual surveys to monitor the strength of the Foundation’s learning culture and systems.

Sharing Through Slack

The Foundation has several Slack channels dedicated to informal learning. These are often among the most active channels. The Slack channels are frequently used to share interesting articles or ideas staff hear at conferences or through interactions. To generate more insights and meaning, the Foundation encourages staff to go beyond sharing just the link to articles or reports by adding a thought or reaction with an insight or implication they see from the resource. More formal knowledge sharing happens through dedicated learning sections in end-of-year strategy memos.

PROMISING PRACTICES

Include the “Why” and “How” Alongside Learning Questions

Each year the Foundation selects approximately five organization-wide learning questions based on their importance and relevance across the organization’s work. It also specifies for each question why it matters (e.g., contribution to a decision, changes in the environment, needs for adaptation or choice-making, etc.) and how it will go about generating insights related to each question. The “how” includes a variety of data sources and approaches, such as grantee check-ins and reports, internal cost-effectiveness analysis, third-party evaluations, research and market trends, etc.

Build Learning into Existing Systems

To make learning a natural, ongoing part of its work, the Foundation integrates learning into existing systems and processes. It dedicates space in most team meetings for conversations tied to learning agenda questions and has a dedicated Slack channel and sub-channels focused on specific learning questions. Its grants management system includes codes to tag insights from grantee reports to specific learning questions. In addition, staff are asked during performance reviews how they have generated and contributed to learning.

LEARNING TO LEARN LESSON



Get Specific in Your Learning Questions

“The instinct is to come up with evergreen broad learning questions—is what we are doing working? How do we get to greater impact? These lead to zero accountability and focus. Sometimes we need to compromise, but the more you can get to concrete questions, the better.”

— Overdeck Family Foundation



KEY STATS

CURRENT STAFF:	~250
ANNUAL GRANTMAKING:	~\$275M
MAJOR PROGRAM AREAS:	4

The Rockefeller Foundation (RF) has a holistic approach to organization-wide learning with a focus on staff as professional learners. The Foundation's Organizational Development and Learning (OD&L) team has responsibility for strategically building the leadership, learning, and operating capabilities of the Foundation, linking leadership development, professional development, organizational learning, and compliance systems to enterprise strategy and performance. The Foundation's Strategic Learning and Impact (SL&I) team houses strategic learning, which they define as the use of data and insights from a variety of information-gathering approaches—including evaluation—to inform decision-making about strategy. In addition, the learning culture is also reinforced by the work of other teams—such as Business Insights and Community Impact & Partners—that advance learning in specific domains and expand collective capability across the organization.

SPECIFIC LEARNING COMPONENTS

Foundation-Level Strategy Guides Strategic Learning

In late 2023, the Foundation launched its "OneRF" climate strategy. Underpinning the strategy is a theory of change that posits that the Foundation needs to use all of its capabilities, not just grantmaking, in order to synergistically accelerate positive impact for people and planet. This One RF strategy creates a learning focus at the institutional level. Within this framework, the Foundation works to balance learning that pushes the organization to adapt and innovate with learning that promotes consistency/quality, accountability, and risk discipline.

Learning Design is Dialogic and Experiential

Much of the learning at RF is oriented toward an agile skill-based organization rather than built around specific content. The goal is to integrate learning into the daily work rather than something that happens apart from normal activities. In addition to extensive use of emergent learning activities (e.g., emergent learning tables), RF uses individual and group reflection (e.g., deliberate reflection in performance reviews on learning, coaching, and ongoing before and after-action reviews), and experiential learning (see promising practice below). In the process, staff build key learning habits, such as making their thinking visible, asking powerful questions, and identifying and testing their hypotheses.

Staff are Expected to be "Professional Learners"—Have a Constant Learning Orientation as an Essential Proficiency in a Changing World

The OD&L team drew from the literature related to learning for skilled professionals, which necessitated a mindset shift from "everything is brought to me" to "I am in charge of figuring it out." Being a good learner means being mindful of how you can be a better partner to your colleagues (an organizational culture bonus). This plays out clearly with knowledge management, where staff are nudged to review the extensive user guides and other artifacts (see below) when faced with a task or decision. It also plays out in individual professional development that is encouraged to be tied to larger foundation learning goals.

Expert Design Strategic Learning Sessions, with an Emphasis on Leveraging Staff Expertise

The teams responsible for learning put considerable attention into the design and norm-setting for learning activities. Wherever possible, staff are positioned in their role as experts. For example, the SL&I-led strategic learning sessions are designed with three central purposes in mind:

1. Be conducive to meaningful dialogue between teams that is not performative or upward reporting
2. Be inclusive of diverse voices, including different functions and staff levels
3. Be focused on topics that are recurrent across the work, versus specific to any individual program

Initially the team relied on external facilitators who could shift norms and expectations and skillfully guide the conversations in the room. As staff have become more comfortable with the process and internal SL&I team members have increased their own mastery of facilitation, the Foundation increasingly relies on internal staff to facilitate the sessions. Facilitators, rather than content experts, elicit diverse perspectives and listen for truisms, probing people for greater nuance. They also more naturally call attention to countervailing arguments and implicit assumptions.

Leadership Participation in Strategic Learning Activities

Leaders at the Foundation are encouraged to actively participate in learning activities. This helps them be engaged in the substance, model learning habits, and has the added benefit of driving interest from broader staff in attending events. For example, staff are invited to optional “strategy dialogue sessions” (see below) where Foundation colleagues, including leadership, share their experiences and collectively generate insights.

Concise Documentation

One muscle The Rockefeller Foundation is working hard to build is helping staff feel like they have easy access to rich lessons and insights that can be called upon and applied as relevant issues arise across their work. This includes developing detailed user guides around specific issues and capturing insights through short summaries of emergent conversations like strategy dialogues and Action Reviews. Where learning needs stem from compliance and risk mitigation, documentation is detailed and specific. Where learning needs stem from adaptation and innovation, documentation is thoughtfully written, but not overproduced “artifacts”, with an emphasis on simplicity. In some cases, the documents include summaries of key points—including what was said and also not said but salient—and provide value by lifting up patterns, trends, challenges, and solutions that are common across the Foundation.

PROMISING PRACTICES

Strategy Dialogues

Strategy dialogues are semi-annual conversations around recurrent topics, themes, or tensions at play across the Foundation’s work. They emerged as an alternative to other fora for which the primary purposes are things like accountability and reporting, and which could sometimes feel hierarchical and/or performative. Originally, the strategy dialogues were extensions of the existing learning that teams were regularly doing. However, that created insular environments, limiting both the learning and use of learning. Recognizing the value of organization-wide learning, RF seized the opportunity to generate more meaningful and diverse dialogue by inviting staff from across the organization to participate.

The SL&I team identifies the topic, and sources live and historic examples from staff members to serve as the catalyst for group conversation and engagement. Staff share case examples in short verbal presentations (no PowerPoints allowed) on how they grappled with a particular question or challenge or strategy choice. Subsequently, all staff in attendance are encouraged to share their own insights, ideas, and experiences related to that strategy choice. Each dialogue is summarized into a short 2- to 3-page artifact that serves as a touch point for people to reference.

Immersive Experiential Learning

The OneRF approach requires collaboration, adaptation, data facility, and a solutions orientation through Action Learning. How can you incorporate all of that into a learning agenda? The OD&L team developed a kind of lab-learning design to address real-world problems by sending a mixed group of staff (different levels and focus areas) to an immersive field experience where they were given a challenge to address. The benefits of the experiential approach included increased organizational understanding of what “One RF” looks like in practice; staff individual skill building (they practiced in the experience and developed a leadership development plan afterwards); and developed an answer to a real-world challenge.

Get Out of Your Seat and Expand Your Feedback Loops—Don’t Just Measure Learning Progress with Surveys

While RF conducts wide-ranging surveys of staff related to its learning work, one of the most important data points is obtained by walking around the organization looking/listening for what is sticking, patterns, and challenges. The immersive experiential learning activities provide another opportunity to observe, possibly even as a participant-observer. In addition, input to the organization-wide learning agenda and activities are informed by people at all levels and departments as a check on unnecessary complexity and learning value.

LEARNING TO LEARN LESSON



Focus on the Experience, Not the Question

“Don’t sweat the questions too much. You don’t have to craft an amazing set of learning questions that everyone buys in to—you are never going to get there. Facilitation is everything! Figure out who can play that facilitator role, making sure they have the power dynamic and skills to facilitate (and aren’t afraid to create discomfort). They can turn low value into high value.”

— The Rockefeller Foundation

LEARNING TO LEARN LESSON



Don’t Neglect the Emotional Aspect of Learning

“The climate learning was intense and we experimented with the emotional aspect of what it means to be aware of all these imminent threats and the stress that brings. We needed to support processing that emotional aspect. We found that a lot of the learning questions and anxiety were “What can I do?” or “What does this mean to me?” People need to be able to process.”

— The Rockefeller Foundation



KEY STATS

CURRENT STAFF:	~135
ANNUAL GRANTMAKING:	~\$600M
MAJOR PROGRAM AREAS:	8

Learning is one of the values at the William and Flora Hewlett Foundation and their leadership considers fostering a culture of learning to be essential to achieving its overall program and strategy goals. This is achieved through a structured framework (called Hewlett U) that includes a variety of different activities.

SPECIFIC LEARNING COMPONENTS

Leadership-Driven Learning Agendas

Hewlett's executive leadership is deeply involved in fostering an organizational culture that prioritizes shared learning. Each year, the Communications Department's Organizational Learning Officer combines ideas and input from staff with key priorities identified by leadership to create an organization-wide learning agenda. The leadership-driven approach ensures that learning is treated as a strategic priority, with leaders actively participating in discussions and championing learning initiatives.

Distributed Leadership for Learning Implementation

Hewlett engages staff across roles and departments through a cross-functional Learning Council. This group helps shape content, select themes, and ensure that learning initiatives are grounded in the realities of staff experiences supporting broader engagement and organizational buy-in. Though the Organizational Learning Officer oversees and coordinates all learning events, each is led by various departments. This includes:

- A series of different types of learning engagements fostered by the Organizational Learning Officer
- Professional development opportunities from the HR team
- Avenues to explore issues related to inclusion and equity in both internal and external aspects of the Foundation's work through its Culture Race and Equity (CRE) team
- Ongoing guidance related to the Foundation's practice of strategic philanthropy Outcome-Focused Philanthropy (OFP) by the Effective Philanthropy Group (EPG)'s strategy and evaluation functions

Structured and Informal Pathways for Staff Learning

The Foundation employs various types of learning pathways to develop staff skills and competencies. This blend of approaches ensures learning is accessible to staff with different learning styles and preferences. The various learning pathways include:

Structured Pathways: Hewlett U is a formal learning infrastructure that names and clarifies the different types of learning activities offered, distinguishing between those that are required and those that are optional. It sets the tone for institutional priorities while signaling what is elective, enabling staff to engage with key priorities and also chart their own learning journey. The Hewlett U structure includes required in-person "Learning Days" (see below) and bi-weekly Shop Talks that are optional, informal, and bring in guest speakers from various fields to inform staff about important current events or fuel curiosity.

Structured mentorship, including new employee onboarding and mentorship programs, ensures that learning is built into the fabric of staff development.

Informal/Less Structured Pathways: Informal learning pathways include cohort-based meetings consisting of recurring, informal gatherings—typically held monthly or bi-monthly, where peer groups like program officers and program associates convene over lunch to discuss topics of shared interest. These sessions offer a space for peer-driven exchange around strategic, operational, or programmatic issues. The format supports cross-program learning and reflection, encouraging candid dialogue and collaborative problem-solving outside of formal structures. The Foundation also provides professional development funds and training opportunities offered by the HR team, as well as coaching, training, and creative learning avenues provided by the Culture, Race, and Equity team to help departments and individuals consider how issues related to inclusion and equity play out in their work.

Documentation to Preserve Learning

While Hewlett has robust learning structures, knowledge retention and institutional memory present challenges due to built-in staff turnover among 8-year, term-limited program officer and director roles and programmatic shifts. The Foundation has established systems for documentation, including a strategy officer-maintained knowledge library and structured program evaluations. However, they feel a more centralized approach to capturing and sharing insights across teams could further strengthen knowledge continuity. Prioritizing knowledge retention and transfer is increasingly important as staff transitions continue.

PROMISING PRACTICES

Program-Specific Learning Days

“Learning Days” take place three times a year—a two-day all-staff “conference” that includes meetings, programmatic deep dives, concurrent sessions with grantees, and competency-building workshops with topics ranging from giving feedback to financial due diligence in grantmaking. Learning Days are required and held in-person. Each Learning Day focuses on one Program, allowing staff to get a deeper understanding of the program areas and to better know many of their grantees (who are guest speakers). This deep dive creates space for cross-program learning and identifying through lines across the Foundation.

Incorporating Practice as an Aspect of Learning

Hewlett U events feature hands-on sessions such as simulations, workshops, and team-led case studies. This promotes active learning, peer exchange, and immediate application of knowledge consistent with staff roles within the organization.

Fostering Continuous Reflection and Feedback

Hewlett’s post-Learning Day surveys and structured debriefs serve as critical tools for improvement and adaptation. Following each Learning Day or training session, staff are invited to share feedback on content, delivery, and relevance. This feedback is compiled and reviewed by the organizational learning team and shared with leadership to inform future planning. The Foundation treats these feedback loops not just as evaluative exercises, but as learning moments themselves—ensuring that content evolves with staff needs and facilitators are responsive to what is and is not working.

LEARNING TO LEARN LESSON



Create Diverse Learning Channels

“Organizations should recognize that different employees engage with learning in different ways. To address this, organizations can develop multiple avenues for participation—some deep, some shallow; some professionally led, some asynchronously individual-oriented.”

— William and Flora Hewlett Foundation



KEY STATS

CURRENT STAFF:	~13
ANNUAL GRANTMAKING:	~\$6M
MAJOR PROGRAM AREAS:	3

The Winthrop Rockefeller Foundation prioritizes understanding systems change through strategic inquiry in a relentless pursuit of equity. Eight years ago, the Foundation shifted its strategic direction from a broad mission of improving the lives of all Arkansans and recognized that it needed to build some new muscles. This was the catalyst for an organization-wide learning agenda.

SPECIFIC LEARNING COMPONENTS

Four Core Skills

As the Foundation considered its new mission, they identified four areas where they would need to have strong skills: design thinking, appreciative inquiry, futurism, and asset framing. These skills are staff-driven and embraced by the board. Each skill is considered through the lens of both research and practice, with a focus on how people think about and approach change.

“Learn-Do” Cycles

The Foundation aims to follow an internal school model anchored in a cyclical calendar of activities—convenings, readings, and research. Using a version of appreciative inquiry, the goal is for all staff to move through some processes together—first learning, then systematically applying insights to their work, and then identifying the next areas of learning. For example, when staff explored design thinking, the aspiration was to apply it in multiple projects and then go deeper in the next round.

Top-to-Bottom Accountability

While functional ownership of the learning agenda sits with the Chief Innovation Officer, the Foundation strives for accountability across the entire organization. The CEO models the expectation and creates space for learning by integrating insights into her work and maintaining a dedicated budget for learning needs. At the board level, the Foundation works toward holding at least one meeting a year with an explicit learning agenda—such as bringing in an outside expert or holding extended discussions on an evaluation of its work. At the staff level, the aim is to keep learning topics visible in performance assessments and in how staff apply insights.

Prioritized Time for Learning

The Foundation realized that its learning agenda was going to require a time commitment that could not be met within the existing organizational structure. As a result, the Foundation reviewed existing meetings and daily practices to reprioritize time for learning. This included moving some meetings to Slack, while shortening or removing others altogether.

PROMISING PRACTICES

Contribution Analysis and Emergent Learning

In collaboration with an external learning partner, the Foundation identifies aspects of its work that are ripe for systematic examination. The inquiries use the “contribution analysis” methodology, which examines the role of both grantees and the Foundation in ecosystem transformation. Instead of trying to demonstrate the impact of the Foundation’s investment, contribution analysis focuses on the Foundation’s role in the change infrastructure. With initial insights from this analysis, the Foundation then engages in emergent learning activities to unpack the “so what” and “now what.” The Foundation also looks across individual contribution analyses to identify themes and trends about how and why their work and environment are shifting.

LEARNING TO LEARN LESSON



Try to Prioritize Learning Together with a Variety of Stakeholders

“Try to start together from day one to bring internal and external stakeholders along with you on your learning journey. It will be slower in the beginning, but it will help you avoid drag later on.”

— The Winthrop Rockefeller Foundation

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About TCC Group

TCC Group is a mission-driven consulting firm and certified B Corporation with over 40 years of experience partnering with foundations, companies, and nonprofits to address complex social problems.



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