Organizational Learning at the Skillman Foundation
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I. OVERVIEW

Purpose

Brandeis contracted with Signet Research and Consulting (Signet) to evaluate how the Skillman Foundation's work practices and culture, and its relationship with its core intermediaries, supports the foundation's aspiration to be a high performance learning organization.

Key Research Questions

1. To what extent has the culture of the Foundation as a learning organization led to high performance and supported new ways of working?
2. To what extent is evaluation used by the Foundation as a learning and management tool?
3. What practices should be continued and/or improved to support attainment of the 2016 goals?

Methods and Limitations

SRC's evaluation protocol included a review of internal and external materials, a brief survey and a number of interviews.

Materials review
SRC reviewed internal and external documents to understand the context inside of which Skillman seeks to be a learning organization. Internal documents included previous evaluations, strategy memos, evaluation team memos to the Foundation, requests for proposals and the evaluation framework. External documents included a range of published articles about organizational learning and philanthropy. A full list of documents and publications is included in the Appendix.

Survey
An email survey was sent out to a cross-section of 12 Skillman staff and one trustee. Eight program staff returned the survey.

Interviews
We conducted sixteen interviews of 30-60 minutes each, in person and by phone, with staff levels ranging from the President/CEO to program associates, and including program and non-program staff and consultants. (See Appendix A for a list of persons interviewed.)

Limitations
Excluded from the scope of this evaluation was any examination of:
- Program meetings in action;
- Learning within non-programmatic areas of the foundation's work;
- Learning-related interactions between program and non-program areas;
- Learning practices in the field—whether within intermediaries, grantee or partner organizations;
- How grantee or partner organizations are affected by or affect the learning practices within Skillman's program areas;
- The role of Data Driven Detroit in the Skillman learning practices or strategy development.

The following report offers our findings and recommendations related to the three evaluation questions. Appendices include a list of materials reviewed and references and headline observations from the GrantCraft Organizational Learning Survey.

II. FINDINGS

Question 1: To what extent has the culture of the Foundation as a learning organization led to high performance and supported new ways of working?

Context

The first definition of a learning organization offered by Peter Senge in his seminal 1990 book, *The Fifth Discipline*, was this: "an organization that is continually expanding its capacity to create its future." (Senge, 1990) More recently, Grantmakers for Effective Organizations defined organizational learning as "the process of asking and answering questions that grantmakers and nonprofits need to understand to improve their performance and achieve better results." (GEO, 2009)

Organizational learning within the field of philanthropy remains in its infancy. Of the 50 percent of foundations that engage in formal evaluation (just one tool to support learning), GEO's research found that most still use evaluation for grantee accountability, not for learning and improvement.

The Skillman Foundation can count itself among the even fewer organizations that make organizational learning a priority, taking its place with such pioneers as the Lumina Foundation for Education, the Robert Wood Johnson Foundation and the David and Lucile Packard Foundation.

As one of the evaluators found in a recent study of grantmaking learning practices (Darling, 2010), *all* pioneers in philanthropic organizational learning struggle to translate commitment and intention into sustained practice that results in improved grantmaking. None have found a silver bullet or even a set of "best" practices. One could say that the field of organizational learning is itself still learning. We commend the Skillman Foundation's commitment not only to being a learning organization but in choosing to evaluate that learning.

Skillman's Definitions of a "Learning Organization"

First and foremost, Skillman's leadership recognizes and discusses the power of learning to strengthen outcomes. Skillman's staff and partners report a high opinion of the vision and leadership of the Foundation. That leaders of the Foundation have made learning a priority is evident in the quality of definitions we heard from staff, which are generally richer than what we hear among staff at other foundations.

Skillman's program staff members said that a learning organization:
- "continuously looks at its policies and practices and results and makes changes"
- "acts as a team in alignment to do whatever it takes to get the job done"
- "is thoughtful, data-driven, and has rapid feedback loops"

- "communicates well internally and externally"
- "takes time to reflect, interpret and make adjustments along the way"
- "understands when it's headed in the right direction and being able to accelerate; and knows when it's headed in the wrong direction and is able to talk about it openly and honestly"

Our interview sample outside of program was small, but it did appear to us that understanding and acceptance of organizational learning on the administrative side may be quite different. The administrative staff may tend to define learning primarily as a professional development activity. "Organizational learning" – and specifically use of the Evaluation Framework – may be perceived as a "program thing." We heard that program tends to get the priority, and there may be a tension between program and administration that the leaders of the organization try to avoid. This might interfere with the candid exchange of ideas that creates a true learning organization.

Also, the need to present strong, positive image to key stakeholders and serve as a motivating force in Detroit's communities may at times come into conflict with the need to make hard decisions and reflect openly in a learningful way with the external world – not an uncommon problem in philanthropy.

Skillman's Culture and its Impact on Performance

The environment in which the Skillman Foundation does its work plays a big role in defining its culture. The compelling and visible need that drives Skillman's mission in Detroit creates urgency to improve. The Foundation's public commitment to specific goals by a specific date (2016) builds on that, creating a "stake in the ground" against which to learn. These are both very powerful drivers, the value of which should not be underestimated.

Skillman's culture was described more than once as a family. People may have arguments, but they maintain strong relationships. Skillman's culture is described in surveys as open and candid (see Appendix B). While we heard of a few topics that are difficult to discuss – primarily across functional or organizational boundaries – our interviews generally confirmed this openness within the program team.

Skillman's leaders are described as being willing to take risks. We heard conflicting messages, however: Leaders are responsive and willing to change direction if something is not working. But we also heard that decisions are slow to be made, especially when it means narrowing focus, and when there is not time to reflect, changes in course do not happen as quickly as they should. Probably both of these descriptions are true, in different situations.

An indicator of the ability of the Foundation to navigate challenges in the past year: staying on course during the President's temporary absence, and the transition of senior leadership in one of the partner organizations.

The Pace of Work

We heard that Foundation leadership holds high expectations for staff, and staff members meet those expectations. This helps create the high-performing organization that is Skillman. It encourages leaders to ask even more. And that, we heard, ultimately creates a pace that is unsustainable:

"The pace is such that there's no time for deep thinking."
"The extraordinary pace undermines execution."
"Pace creates an environment where the family doesn't talk to each other."

The highest performing learning organizations Signet has observed have a common characteristic: staff at all levels understand not just what decisions leaders have made, but they understand *why* they made them. Understanding the thinking behind leadership decisions helps staff make solid decisions of their own with confidence when facing unprecedented or unpredictable situations. And their ability to make those decisions and to explain their reasoning raises the confidence of organizational leaders in return. It creates a virtuous cycle where the whole system is aligned and prepared to perform in complex and changing situations. This could also be described as "developing bench strength," but it has short, medium and long-term benefits:

- Short-term: Faster decision-making and less reliance on senior leaders
- Medium-term: Ability to work autonomously to move more quickly toward goals
- Long-term: Leadership succession

Skillman's pace is creating a vicious cycle. From our interviews, we heard that lack of time means that key people are too often inaccessible. Time for reflection is a frequent victim. Priorities may not get decided or communicated in a timely way. ("By the time we hear a decision about goals, we are on to something else.") We heard that lack of time means, too often, that staff and partners don't get the opportunity to engage in or understand the thinking of the Foundation, which reduces their ability to take the autonomous, creative action that it will take to achieve the foundation's 2016 goals, which in turn reinforces dependence on senior leaders.

In our interviews, we heard an intention on the part of leaders to change this pattern, including seeing the transition in the programmatic work of liaisons to executive directors for the governing groups in the neighborhoods as a ripe opportunity to shift leadership to the communities. This also provides an opportunity to shift how the Foundation does its work – introducing more opportunity to reflect and breaking the vicious cycle that this pace creates. We heard what may be an early indicator that this shift is working: one partner described her own experience that the pace was slowing, which is providing more time for reflection and learning.

Alignment and Empowering Staff

It appears to us that program staff and its leadership understand the importance of building alignment by hashing out thinking and giving staff an opportunity to weigh in on decisions.

When it works, it appears to work well. We were impressed by the work done by the Good Neighborhoods and Good Schools program staff to build alignment of outcomes between differently conceived programs; to "lift up tensions" and learn about them in a safe space. Staff reported that weekly brown bags helped. And for those who participated, the entire process of developing the Evaluation Framework helped build understanding and alignment about Skillman's outcomes and goals.

We heard that the Senior Program Officers Team meetings provide a rich dialogue about Foundation thinking and some of that gets expressed in other program and cross-organizational meetings.

Nonetheless, we heard a strong message that there is a need to hear more about the thinking behind decisions and to receive more and better guidance to weigh priorities. ("We must be empowered at each level to work and *move*.") A partner described receiving mixed messages at the point of each big strategic decision. The impacts we heard described were:

- Not feeling empowered to make decisions
- Having to course-correct because of not receiving information in a timely way, sometimes leading to unnecessary back-peddling
- Not having sufficient confidence in priorities to be able to say no to opportunities and work requests that take attention away from those priorities

Summary and Recommendations

We want to reiterate that, based on our own anecdotal data, Skillman appears to us to be farther along the continuum toward being "an organization that is continually expanding its capacity to create its future" than the majority of its peer organizations. The understanding staff members display about what it means to be a learning organization and Skillman's mission-driven culture are a solid platform. The Foundation needs to continue to work on shifting its pace and building a deeper knowledge base to drive its priorities and decisions at all levels.

Recommendations:

1. **Continue to work on creating a virtuous cycle**

    As an overarching goal, strive to have the whole system (Foundation staff, partners, grantees and neighborhoods) aligned and prepared to make good decisions and take effective action in complex and changing conditions. While high standards for achievement have created a pace that is unsustainable, it is not so much that the Foundation should focus on slowing down the pace, but focus on reducing the decision-making bottleneck. *What will it take for staff and partners to become less dependent on senior Foundation leaders to make decisions before they can move forward?*

2. **Use the transition to neighborhood governing groups to develop new work practices**

    This transition was identified by one foundation leader as an important opportunity to change the way the Foundation works – to shift some leadership responsibilities to neighborhoods and address the issue of pace within the Foundation. We applaud this insight and encourage Foundation leaders and staff to take full advantage of this shift to keep exploring how to empower neighborhoods and, meanwhile, how to work in new ways at the Foundation that creates a more sustainable pace.

3. **Get better at sharing thinking in order to actively empower staff**

    One critical step in shifting to a virtuous cycle is to get better at sharing the thinking behind decisions. Decision-makers should develop the habit of describing their rationale for a decision: *What does this decision help us to accomplish?* Staff should develop the habit of asking this question when they need better understanding, and should be prepared to answer the question for their own decisions in conversations with senior leaders. If this question can be seen not as a challenge, but as

a way to develop understanding, it can become a tool to build alignment, empowerment and knowledge.

4. **Use board preparation as a focusing mechanism for strengthening learning and alignment**

   In Signet's recent research report (Darling, 2010), we advocated for finding important "punctuation points" in current work practices and linking learning to those, rather than treating learning activities as a separate ad hoc activity, which is perceived as a distraction by over-committed Foundation staff members.

   In Foundations, preparation for board meetings represents a huge, repeated work priority and a huge opportunity to strengthen alignment and learning. The quality of thinking represented in cover memos and other documents the Skillman staff prepares for its board book is the quality of thinking that Skillman needs to nurture across the staff. If the reflective dialogue that feeds into this process can be made more deliberate and inclusive, it can contribute to breaking the vicious cycle created by pace, to moving together to achieve the 2016 goals, and, as a very intentional side effect, to building bench strength for the future of the Foundation.

5. **Be deliberate about learning to improve decision-making**

   Whenever Foundation leaders find that action has been delayed because a staff member is waiting for a decision from senior staff, or a decision has been made but not communicated effectively, it is an opportunity to reflect and consider: *What would make it possible to make and communicate this kind of decision more effectively in the future?* Or… *What would it take for this kind of decision to be made by members of our staff in the future?*

6. **Bring administrators into the learning organization conversation**

   This evaluation did not provide enough information to give a solid recommendation here, but suggests that it would be worth exploring how to develop a more integrated understanding of organizational learning across the whole Foundation.

Question 2: To what extent is evaluation used by the Foundation as a learning and management tool?

Context

A typical complaint about philanthropic evaluation is that it takes too long to produce overly long reports that aren't seen as useful. The evaluation field is evolving to more work-centric, real-time evaluation models. Both this complaint and efforts to shift the way evaluation is done were evident in our interviews.

What We Heard

We heard that evaluation is part of every team, and that people *try* to reflect on reports, though the reality often does not meet the aspiration. We heard that Brandeis' presence in neighborhood meetings is a valuable contribution. ("We don't have to wait for a report.") And we heard that the foundation and its evaluators are working to produce and deliver evaluation data that is useful to the work. One staff member described evaluation as having shifted from comparison to "best practice" toward what the foundation needs to know to achieve its goals. The Evaluation and Learning Team was cited as being inclusive regarding evaluation. Reports do not get thrown at staff. They have the opportunity to weigh in. Finally, Data-Driven Detroit was described as an important investment for the foundation and neighborhoods.

We heard that partners do not have a budget for, and do not participate actively in, ongoing Foundation evaluation, though we did hear that the University of Michigan's Skillman Technical Assistance Center has played a strong role in "breeding a culture of respect" for evaluation among neighborhoods through its technical systems and training, and has used the Evaluation Framework heavily in planning their work and fostering cross-neighborhood learning on common issues.

Evaluation as a Management Tool

The Evaluation Framework is a powerful resource that is being used to make decisions. Within the foundation, we heard different levels of engagement, from "everyone is expected to use it to justify their work" to "it's referenced, but not really used" and "I know it's in a file somewhere." We believe that this discrepancy is primarily due to staff tenure and role (and hence how involved individuals were in the dialogue that created it).

There is more work to be done. We heard that while there is high alignment on outcomes in the Framework, there remains disagreement regarding measures. Disagreement on measures can mask important misalignments on direction and/or scope. Also, while the evaluation and learning team recognizes the importance of an evolving framework that represents changing thinking based on data, one partner expressed a concern about the evolving nature of the Framework and reticence to use it in its "draft" form with neighborhoods.

We heard that Foundation staff experience a fairly profound tension between the need to stay focused on a few strategic priorities closely tied to the 2016 goals and taking advantage of opportunities to leverage current political and community events to build support for the Foundation's work. It is an honest dilemma and a difficult trade off. While taking advantage of some of these opportunities can create tremendous leverage in the future, having to drop everything to respond also "untrains" leaders and staff from making the tough decisions about what is needed to really achieve the Foundation's 2016 goals, and leads staff to wait for guidance before acting, which reinforces the vicious cycle described above.

We believe that the value of evaluation as a management tool is measured in its ability to strengthen future decisions – not just by senior staff, but by everyone in the Foundation and its network of partners, grantees and neighborhoods who face big decisions and small, but important, choices every day.

Evaluation as a Learning Tool: Reflection and Pace

As a result of Signet's research into grantmaking learning practices, we developed the following illustration of the fundamental cycle that "closes the loop" to produce learning through grantmaking in the short, medium and long-term. Each foundation we have studied has some links that are strong and working well and others that are weak or broken.

Reflection is the point in the learning cycle where meaning gets made that informs future action. Without opportunities to reflect together, the staff of a learning organization "flies blind," making decisions based on intuition or habit.

More than anything else in the grantmaking learning cycle, people report that Skillman's pace nearly eliminates the time available to reflect on results and adjust planning and action. Outside of long-term strategy, learning from past lessons is brought into planning "off the top of our head." Reflection in the annual planning process was described by some as fairly effective, but one person described it as

"shallow." Without appropriate time for reflection, lessons will not get translated into better planning and better action, which will have a big impact, we predict, on the ability of the Foundation and its partners to achieve its goals by 2016.

It is important to distinguish between course-correcting and learning to improve future performance. We heard that the work on the ground between the program officers, partners and neighborhoods does lead to effective course-correction and learning that is applied to improved action *in those neighborhoods*. But these neighborhood- or school-specific lessons are not being captured in meaningful ways that can support learning to improve future performance throughout the network of grantees and partners, and does not feed back into evaluation. We asked one program staff: "How well does what gets learned on the ground become accessible knowledge and fed into the foundation's evaluation process?" Answer: "It doesn't." (Note that even some of the most committed "learning organizations" find this to be a challenge. But nonetheless it is worth aiming to improve.)

We believe that if the pace of the Foundation could be shifted, the staff has the capacity and desire to use evaluation to reflect, learn and grow the knowledge it will take to achieve its 2016 goals.

Summary and Recommendations

The Foundation's evaluation practices are shifting in ways that are consistent with best evaluation practices. The fact that neighborhoods are encouraged to do their own evaluation and learning, and are providing the training and support to actually do it, amplifies the value of Skillman's investment. If Foundation leaders can continue to tackle the fundamental challenges of trading off being strategic vs. opportunistic, and tackle the challenge of pace in order to find precious time for reflection, it will raise the value produced by evaluation for both learning and management.

 Recommendations:

1. **Strive to gain alignment on measures related to 2016 goals**

   The next task related to Skillman's Evaluation Framework is to get better at pushing beyond the aspiration and having what may be a difficult conversation about what it would really look like if you succeeded; acknowledging and talking through different visions, goals and metrics.

   This might be as simple as choosing a goal, encouraging staff, partners and grantees to candidly express their own thoughts about what constitutes a measure of success around that goal, and choosing one of your regular meetings to host the kind of dialogue over the course of a few meetings that helped Good Schools and Good Neighborhood program staff to strengthen their alignment.

2. **Think carefully about the trade-off between being opportunistic and building greater focus**

   The leadership team should consider how opportunism supports/impedes long-term success and strive to find the right balance. Consider conducting a review of some opportunistic moves Skillman leaders have chosen to make in the past year: *Given what you anticipated, how well did it contribute*

to your progress? Can you develop some criteria to help decide if future opportunities like this are worth shifting priorities?

3. **Find and preserve time for reflection and conclude with agreements about decisions and actions**

   Strive to develop a "fit-for-purpose" approach to reflection. Annual planning may require a more deliberate and intensive approach to getting the quality of deep insight that will best serve the planning process. But debriefs of regular activities might require no more than a few minutes – enough to articulate one or two useful insights to take forward.

   There are several creative ways to adapt the reflection process that we can discuss in person. Creative approaches will be especially important during the (admittedly busy) meetings devoted to preparing for Board meetings. *How could reflecting even briefly on lessons learned related to topics coming before the Board help both strengthen the Board Book and also foster deeper knowledge across the staff?*

   It is worth considering why so many important meetings need to be cancelled because one busy person cannot attend. Are there times when these meetings should be held regardless, maybe with a focus on reflecting on lessons learned, reporting insights to missing staff in a subsequent meeting?

4. **Get better at making lessons learned on the ground more broadly available**

   Most organizations struggle with growing useful knowledge through sharing lessons learned because they can seem random and often irrelevant to current work. Surfacing and sharing learning priorities (see Question 3 recommendations) can help organize the process of growing useful knowledge across the Foundation and its partners. Ideas about how to do this will be offered as part of developing a practical knowledge management plan.

Question 3: What practices should be continued and/or improved to support attainment of the 2016 goals?

Context

Too many learning initiatives introduce new processes or programs that effectively take people's attention away from their mission-critical work, with all sorts of unintended consequences. The most powerful way to improve learning is to focus on making small improvements in regular work. Skillman has already begun to tackle some information flow improvements related to its work – making Board Book preparation more efficient and improving the Grants Management system. Like many foundations, so much of Skillman's work gets done in meetings that it warrants focusing on improving practices here.

Skillman's Current Meeting Practices

In our interviews, we heard about the value produced by meetings: the candid exchanges during Senior Program Officer Team meetings, and quarterly Neighborhood Lunch & Learns with grantees and

partners; the monthly Learning Partnership meetings (which, we heard, have become better organized based on partner feedback); the Learning Community meetings around a particular topic with staff, grantees and stakeholders.

We heard that setting aside Mondays for internal meetings is a very important vehicle for information flow and tacit knowledge exchange. Some of these meetings generate real breakthroughs in thinking. This is where work is seen holistically.

But we also heard a number of complaints about meetings. Some staff felt that too much time was spent on reporting out and sometimes the information shared was redundant. Meetings frequently lack agendas or veer off focus. One person observed that meetings are not documented well. Another person observed that it is too easy to think that people are in alignment, but in some meetings, there is no progress because everyone says something different and no decisions are made. Some staff members dominate the discussion and others feel that they don't have a chance to weigh in.

Staff members disagree about how much structure meetings should have. One person observed that the fluid and sometimes redundant conversations build alignment. Another observed that when meetings are well designed and facilitated, the staff is good at reflection. But when they are fluid and redundant, there is not enough time available for the most frequently requested meeting activity: reflection on what's being learned through the work.

One person observed that what does not happen often or well enough is meetings to debrief after action in order to coordinate future execution. Finally, staff complained about meetings being cancelled too often when senior staff members are unavailable, which exacerbates the vicious cycle created by the Foundation's pace.

There is clearly value being created from how Skillman conducts its meetings today. There is a time for open, intuitive "follow your nose" dialogue and a time to be more rigorous. Both add value and the lack of the latter is felt by the organization. Skillman's challenge is to figure out which path to take for what kinds of meetings and what kinds of outcomes.

There is also more work to be done to improve information flow and knowledge sharing. Some information flow improvements might help to reduce unnecessary redundancy in meetings and make time for more sharing of leadership thinking and reflecting together on lessons learned.

Identifying Learning Priorities

The context in which foundations operate is extremely complex and fluid. In the same way that there is too much to do, there is quite literally too much to learn. In Signet's research, we have observed that foundations can perform all of the right "learning organization" practices, but without a clear focus for its learning, they may not produce high performance or move the impact needle.

We heard that the most deliberate learning tends to happen after a bump in the road. This is not uncommon, and a useful place to start. But the quality of learning that emerges from such reflection tends to be reactive – how can we not make that mistake in the future? The more powerful question is: How can we get better at predicting bumps in the road before we hit them? This requires a fundamental shift in the way the Foundation thinks about learning from experience.

Summary and Recommendations

There is much good work to be preserved, and there are gaps to be filled. Even carving out 5-10% of the time spent in meetings to better articulate the thinking behind leadership decisions and to reflect on lessons emerging from work would be felt, we believe, to be a big improvement by Foundation staff. If that reflection were driven by a focused learning agenda, it would contribute more quickly to greater knowledge and improved practice.

Recommendations:

1. **Improve basic meeting management**

   Rather than attempting to make a blanket change to the way meetings are conducted, we would recommend that Foundation staff members think about the purpose and strengths and weaknesses of each kind of meeting: *When should staff preserve the open dialogue that is so valuable and when should meetings be more structured, so that more voices can be heard, leaders can share their thinking, and there is time for a different quality of reflective conversation?*

2. **Develop an effective and efficient debriefing methodology**

   Foundations (and many other kinds of organizations) tend to make this process to large and cumbersome. Consider adopting the simple technique of conducting Before and After Action Reviews to improve learning from discrete experiences. (For more information, see a description in "A Compass in the Woods".)

3. **Improve information flow in the context of supporting meetings**

   We would encourage the Foundation to better understand what meetings need to accomplish and how to improve them first, and then to tackle the question of what information is needed when, and what information flow could be managed outside of meetings using technology improvements. As part of a separate project to help Skillman Foundation develop a Knowledge Management plan, we compiled a list of the kinds of information identified in the course of our interviews as needed by Foundation staff. These included:
   • Who the major players are and their priorities
   • Fast-breaking news on policy changes
   • Media clips to track the political landscape
   • The "Voice of the Community" (hearing and respecting residents' perspectives)
   • Granular data for each neighborhood related to 2016 goals
   • Status of development and planning for each governing body
   • Better impact data to evaluate the value of investments

4. **Develop a learning strategy to match the Foundation's strategic plan**

   Just as Skillman is working to hone its strategic focus in order to achieve its 2016 goals, the biggest improvement the Foundation and its partners could make in its learning practices is to hone its learning focus. What does the Foundation most need to focus on learning in order to achieve its 2016 goals?

Each "node" in the network of players that have a role in turning Skillman's 2016 goals into reality will face unique implementation challenges over the next five years (Foundation board and staff, partners, grantees, neighborhoods, state and local government officials, etc.). We would encourage the Foundation to help each willing party to develop a learning agenda that identifies their biggest anticipated challenges, turns them into learning priorities, and lays out a simple plan to learn through the work itself and grow and share knowledge with the larger network.

This kind of focus amplifies the benefit of doing short debriefs or more extended reflection after either successes or failures. *Did we do what we said we were going to do? Did it work? What does this tell us about our thinking? What do we learn from this that we can apply to future work?*

Appendix A: Persons Interviewed

The interviews conducted for this evaluation included:

Skillman Foundation
- Carol Goss, President & CEO
- William Hanson, Director of Communications and Technology
- Danielle Olekszyk, Chief Financial Officer and Treasurer

Program Group Staff:
- Alex Allen, Program Officer
- Tonya Allen, Vice-President, Program
- Marie Colombo, Senior Program Officer, Knowledge Management
- Edward Egnatios, Senior Program Officer, Neighborhoods
- Sharnita Johnson, Senior Program Officer, Changemaking
- Kristen McDonald, Senior Program Officer, Schools
- Lan Pham, Program Associate
- Robert Thornton, Program Officer

External Partners and Evaluators:
- Prudence Brown, Independent Consultant
- Susan Curnan, Director, Center for Youth and Community, Brandeis University
- Della Hughes, Sr. Fellow, Center for Youth and Community, Brandeis University
- Patricia Miller, Manager, University of Michigan Technical Assistance Center
- Kelly Gulley, President, National Community Development Institute

- **Appendix B: Materials Review and References**

Internal
- "Leveraging Learning to Improve Foundation Effectiveness and Impact," (and related talking points) CMF Annual Conference, Traverse City, MI: October 10, 2009?
- Selected strategy memos, including "Education Update," September 10, 2010; "Good Neighborhoods" September 10, 2010; "Good Neighborhoods Strategy," July 2010.
- Selected program/portfolio fact sheets, including "IRRE."
- Skillman Foundation Good Neighborhoods Request for Proposals, September 2010
- Skillman Foundation Good Neighborhoods and Schools Ecological Model
- Skillman Foundation GrantCraft organizational learning survey and responses.

External
- P. Brown, M. Colombo, D.M. Hughes, "Foundation Readiness for Community Transformation: Learning in Real Time," *Foundation* Review, Winter 2009, 1:1.
- J. Coffman, "Build Strong Foundations for Our Youngest Children: A Framework for Evaluating Systems Initiatives," August 2007.
- M. Darling, "A Compass in the Woods: Learning through Grantmaking to Improve Impact," Signet Research and Consulting, October 2010.
- A. Edmondson, "The competitive imperative of learning," *CIO*, 11 August 2008.
- "Evaluation in Philanthropy: Perspectives from the Field," GEO 2009.
- D. Gavin, A. Edmondson & F. Gino, "Is Yours a Learning Organization?," *Harvard Business Review*, March 2008, and related survey created in partnership with GrantCraft.
- R. Hamilton, P. Brown, R. Chaskin, et al, "Learning for Community Change: Core Components of Foundations that Learn," Chapin Hall, 2005.
- P. Senge, *The Fifth Discipline*, Doubleday Currency, 1990.

Appendix C: A Portrait of the Skillman Foundation as a Learning Organization

To generally summarize the results of the GrantCraft survey on organizational learning, staff members of the Skillman Foundation share the following observations about the Foundation:

It is moderately to highly accurate to say that:
- People value new ideas.
- People are interested in a better way of doing things.
- Professional development is valued.

But…
- People are overly stressed.

It is moderately accurate to say that:
- Differences in opinion are welcome.
- It is easy to speak up about what is on your mind.
- If you make a mistake, it will NOT often be held against you.
- People are usually comfortable talking about problems and disagreements.
- Units regularly share information with others within the Foundation.
- The Foundation engages in productive conflict and debate during discussions.
- The Foundation shares information with other organizations.
- The Foundation identifies and discusses underlying assumptions that might affect key decisions. (Though interviews suggest that this may be truer for Program Officers than for associates and fellows.)
- The Foundation regularly conducts reviews after an initiative or program is completed (with a wide range of opinions).

But…
- Schedule pressure gets in the way of doing a good job.
- There is simply no time for reflection.

It is slightly to moderately accurate to say that:
- An opinion that is inconsistent with what most people believe will be valued.
- The Foundation frequently experiments with new internal ways of working.
  The Foundation seeks out dissenting views during discussions.
- The Foundation pays attention to different points of views during discussions. (Though interviews suggest that this may be truer for Program Officers and Associates than for fellows.)
- The Foundation has formal opportunities for meeting with and learning from experts in the field and colleagues in their own and other foundations and grantee organizations (though opinion was mixed regarding learning from colleagues in other units).

It is slightly accurate to say that:
- People find time to review how the work is going.
- The Foundation revisits well-established perspectives during discussions.

It is generally accurate (opinion is mixed regarding how much this is true) to say that:
- People are open to alternative ways of getting work done.
- The Foundation experiments frequently with new programs or initiatives.
- People are eager to share information about what does and does not work.
- Time is made for professional development activities.

Opinion is mixed regarding:
- Whether people often resist untried approaches.
- Whether people are too busy to invest time in improvement.
- Whether the Foundation has a formal process for surfacing new ideas and approaches.
- Whether managers acknowledge their own limitations with respect to knowledge, information and expertise.
- Whether the Foundation has a formal process for using new information to inform decision-making.
- Whether managers provide time, resources and venues for identifying problems and organizational challenges.
- Whether newly hired employees receive adequate training to do their job.
- Whether new employees receive adequate orientation to the Foundation's work culture and practices.
- Whether there is a formal process for new employee orientation.

It is highly inaccurate to say that:
- Keeping your cards close to your vest is the best way to succeed.
- Unless an idea has been around for a long time, no one wants to hear it.

About managers:
- Managers often invite input from others in discussion.
- Managers generally ask probing questions.
- Managers sometimes or often listen attentively.
- Managers often encourage multiple points of view.
- Managers sometimes provide time, resources and venues for reflecting and improving past performance.
- Managers infrequently criticize views different from their own.