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Shine a Light: The Role of Consultants in Fostering a Learning Culture at Foundations

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Key Points

· Noticeably absent on the list of reasons foundations cite for engaging consultants is learning – a particularly important attribute for foundations that grapple with complex issues in dynamic environments.

· Consultants are particularly well positioned to help foundations in the learning process. They help organizations understand and create models and frameworks, implement strategies and mechanisms within them, overcome roadblocks to learning, and put them on a path toward a dynamic and sustainable learning culture.

· This article proposes that being explicit about the value of fostering a learning culture in a foundation within the context of any consulting engagement will enable both parties to more proactively strive for and achieve learning results. Our analysis uses this premise as a jumping-off point to a deeper exploration of the myriad ways – some simple, some complex – that consultants help foundations cultivate a learning mindset.

Introduction

In a recent review by the Foundation Center on how many foundations hire consultants and why 33 percent of a sample of more than 1,000 foundations reported having used a consultant in the past two years (McGill, Henry-Sanchez, Wolcheck and Reibstein, 2015).Foundations reported hiring consultants to assist in areas including technology, communications, evaluation, strategic planning, facilitation, program development, governance, and grants management.

Noticeably absent in the lexicon of consulting engagements is learning – a particularly important attribute for foundations that grapple with complex issues in dynamic environments. Learning not only serves to strengthen outcomes, but it can be fundamental to establishing sophisticated strategy. For the purpose of this article, we assume that the reader need not be convinced of the varied benefits of an organizational learning culture.

If one, then, were to query foundations about why they don't use consultants for learning, they would likely insist that they do, and that would be consistent with our own experience. When we work with foundations – whether we are doing strategy work, capacity-building work, evaluations, or some combination of the three – foundation staff invariably expresses a desire for project results to include knowledge transfer, for the ability to use information, for building some internal capacity, and for general learning to occur.

But while these concepts are often voiced with enthusiasm at the outset of a project, they tend to be piecemeal and prone to being subsumed by changing priorities and the exigencies of the day. With the concept of learning frequently masked behind some other type of engagement, foundation practice is too often unsystematic with regard to the issue.

This does not mean that it doesn't occur or that it requires complex systems to be in place. This article proposes that simply being explicit about the value of fostering a learning culture in a foundation

within the context of any consulting engagement will enable both parties to more proactively strive for and achieve learning results. Our analysis uses this premise as a jumping-off point to a deeper exploration of the myriad ways – some simple, some complex – that consultants help foundations cultivate a learning mindset.

Following a review of the literature, we propose ways of thinking about the unique role that consultants can play in fostering learning cultures and conclude with competency implications for both consultants and foundations.

Review of the Literature

This article is not intended to be a full review of how to develop a learning culture; there is expansive and detailed academic literature on that topic. However, it is worth grounding the discussion of how consultants can help foundations build a learning culture in a brief review of that literature (see Table 1).

It was probably Peter Senge's work, popularized in his book *The Fifth Discipline: The Art and Practice of the Learning Organization*, that brought building an organizational culture of learning to the attention of the broader public. He described three core learning elements: fostering aspiration, developing reflective conversation, and understanding complexity (Senge, 1990).

Prior to Senge, Chris Argyris and Donald Schön (1978) developed the double-loop learning model, which they contrasted with single-loop learning. Single-loop learning could be described as the typical instructor-based or didactic model and is characterized by a well-defined purpose. It emphasizes rationality, and seeks a unilaterally controlled environment. Double-loop learning is characterized by a classic Socratic notion of internalized commitment to questioning and discovery; it seeks valid information and more system-control of the learning environment (what the authors term bilateral control). In short, Argyris and Schön described organizational learning as something that requires broad organizational commitment and joint engagement rather than unidirectional passing of information.

Other models have since surfaced. In *A Multifacet Model of Organizational Learning,* Raanan Lipshitz, Micha Popper, and Victor Friedman (2002) examined the different dimensions of organizational learning, dividing learning mechanisms along a two-by-two matrix. On one side of the matrix, they distinguished between designated and dual-purpose learning. Designated learning occurs distinctly and separately from day-to-day task work; dual-purpose learning occurs alongside the performance of tasks. On the other side of the matrix, they distinguished integrated and nonintegrated learning. Integrated learning is done by those who are performing a particular task; nonintegrated learning is carried out by people not doing the task (e.g., chief knowledge officers or external formative evaluators).

In one of the few articles looking specifically at the nonprofit sector, Katie Milway (2013) examined how to make organizational learning "stick." She identified a matrix of four goals to map knowledge sharing, one of which was fostering a culture of learning. The other elements were sharing good practices, collaborating, and influencing the broader field in order to multiply impact. That work built on earlier efforts published in the *Stanford Social Innovation Review* (Milway and Saxton, 2011), which articulated four elements of organizational learning: having supportive leaders, a culture of continuous improvements, knowledge processes that are embedded into daily workflows, and an organizational structure aligned to support learning.

The evaluation field has been pursuing the concept of learning within philanthropic organizations for a number of years. Beer and Coffman (2011) identified a series of principles for strategic learning that examined the role of evaluation, including evaluation being a support for strategy, integrated and conducted in partnership with the implementers. The authors also emphasized context and placed a high value on use. Patrizi, Heid-Thompson, Coffman, and Beer (2013) examined learning as a part of strategy, particularly under conditions of complexity. This work focused squarely on foundations and identified three "traps"

REFLECTIVE PRACTICE

TABLE 1 Summary of Select Organizational Learning Theories

	Multifacet Model of Organizational Learning Victor Friedman, Raanan Lipshitz and Micha Popper	Model II Behavior Chris Argyris and Donald Schön	Organizational Learning Matrix Katie Milway/Bridgespan	The Fifth Discipline: The Art and Practice of the Learning Organization Peter Senge
Elements of Learning and Theory	Distinguishes between how organizations learn and what makes learning productive **Organizational learning mechanisms** explain how institutions learn. Productive learning is a conscious and systematic process, yields valid information, and results in actions intended to produce new perceptions, goals, and/or behavioral strategies. Four types of learning determine who detects and corrects errors through information processing, and characterize when and where learning occurs: ▪ Integrated vs. nonintegrated learning ▪ Dual purpose vs. designated learning	Emphasizes common goals and mutual influence, encourages open communication and testing of assumptions, combines advocacy with inquiry The double-loop learning concept: ▪ Governing variables are subject to intense scrutiny and questioning. ▪ Learning may lead to alteration of governing variables and a shift in the way strategies and consequences are framed.	Four-faceted model for organizational learning: ▪ Supportive leaders champion learning and have clear vision and goals. ▪ A culture of continuous improvements includes clear learning goals, alignment of beliefs and values, and commitment to evaluation. ▪ A defined learning structure features explicit roles and responsibilities and networks/coordination. ▪ Intuitive knowledge processes are embedded into daily workflows, supported by technology platforms.	Five disciplines exhibited by learning organizations: ▪ Personal mastery - clarifying and deepening personal vision, focusing energies, developing patience, seeing reality objectively ▪ Mental models – deeply ingrained assumptions, generalizations, or images that influence how we understand the world and take action ▪ Building shared vision – unearthing shared pictures of the future that foster genuine commitment and enrollment (vs. compliance) ▪ Team learning – the capacity of team members to suspend assumptions and think together ▪ Systems thinking – integration of the previous four principles
Mechanisms/Strategies	▪ Error criticality: Immediacy and seriousness of error consequences and associated costs ▪ Environmental uncertainty: Rate of change in environment and extent and intensity of competition in the environment ▪ Task structure: Feasibility of getting information and people's motivations to cooperate with colleagues in learning ▪ Proximity of learning to the organization's core mission ▪ Leadership commitment	▪ Sharing control ▪ Participation in design ▪ Implementation of action ▪ Attribution and evaluation illustrated with directly observable data ▪ Surfacing of conflicting views ▪ Encouraging public testing of evaluations	▪ Define actors. ▪ Identify learning needs. ▪ Identify high-value sources of knowledge. ▪ Define processes for each source. ▪ Translate processes into tangible steps. ▪ Align resources and support to new capabilities.	▪ Existing norms, power relationships identified ▪ Leaders and managers model desired behaviors ▪ Shared vision into daily work integrated ▪ Dialogue and discussion within and between teams ▪ Positive visioning, concept-shifting, and values alignment ▪ Ladders of influence, reflective inquiry ▪ System mapping

TABLE 1 Cont'd Summary of Select Organizational Learning Theories

Impediments to Learning			
Clarity surrounding learning ▪ "Mystification" and opacity of organizational learning ▪ Defensiveness and defensive routines	Model I and single-loop (unidirectional) learning ▪ Governing principles taken for granted ▪ Over-emphasis on efficiency, positivity, control, risk aversion ▪ Self-reinforcing feedback loops ▪ Defensiveness and defensive routines	Gaps in the learning cycle ▪ Goals gap – failure to define goals for learning ▪ Incentives gap - failure to identify incentives for individuals, teams, or the organization ▪ Process gap - failure to establish intuitive processes to capture, share, and use knowledge	"Learning disabilities" - habits or mindsets that block learning ▪ Loyalty to the job vs. the organization ▪ Blaming others when things go wrong ▪ "Taking charge" without examining weaknesses ▪ Fixation on events/ short-term thinking ▪ Lack of reaction to small changes that are leading to big consequences ▪ Functional silos and lack of communication ▪ Rewarding groupthink, punishing dissent at the leadership level ▪ Defensiveness and defensive routines
Values			
Cultural: Transparency, integrity, issue-orientation, inquiry, accountability Psychological: Safety, trust, commitment Policy: Commitment to learning, tolerance for error, dedication to the organization's workforce	Valid information, inclusive design and participation, free and informed choice, internal commitment to the choice and constant monitoring of its implementation	Intuitive processes, integrated learning, commitment	Trust, openness, dialogue, long-term thinking, self-awareness/understanding

that hinder the ability to learn: linearity and certainty bias, the autopilot effect, and indicator blindness. Recent benchmarking done for the Evaluation Roundtable (2012) – a network of foundation evaluation leaders that seeks to improve how foundations learn about the results of their grantmaking and increase the impact of their work – found that the number of full-time employees dedicated to evaluation and learning had increased across foundations, but was still very low. Further, the report found that the evaluative/learning function within foundations was evolving at a faster pace than the level of staffing. This sentiment was echoed by consultants and foundation representatives providing feedback for this article, with one bluntly suggesting that foundation staff in charge

of evaluation and learning lack sufficient power and ability to push for real progress in either area. The sheer scope of learning needs within foundations indicates a need for greater support and capacity for the function of learning, which might come from outside the philanthropic institution.

Finally, in setting the background for the role of consultants in fostering organizational learning cultures, we must acknowledge the vast existing literature on consulting itself. In the philanthropic sector alone there are numerous articles and grey literature (informal published written material) that discuss how to effectively use consultants. For example, Ross and Mukherjee (2012) discussed "10 Traits of a Great Consultant"

It is a bit of a cliché that every consultant has her own 10-step program or patented guide to solving all organizational challenges. While these frameworks sometimes deserve the derision inherent in the cliché, the fact is that, more often than not, they help organizations view themselves in new and different ways.

in the *Chronicle of Philanthropy*. Key traits listed by the authors included the ability to gain client trust, transferable skills, a good understanding of the business, the ability to be a good listener, and the ability to market. McCambridge (2007), writing on how to ensure a successful consulting engagement, identified four roles that consultants can play with varying complexity: an expert, a facilitator, a process consultant, and, in the most basic instance, another pair of hands.

Edgar Schein (1969), a former MIT professor of management, is one of the more notable articulators of the consultant role. His 1969 *Process Consultation: Its Role in Organizational Development* is still widely used today (though his 1999 *Process Consultation Revisited* may be more common in today's classrooms). Schein contrasts process consultation with expert consultation, where experts bring packaged solutions that may have general validity. Schein argues that an orientation toward process means the consultation is focused on adapting to the organizational context rather than bringing prepackaged solutions. Consulting, in his view, requires a partnership between the client and the consultant, mutual responsibility, and building capacity to deal with the issue at hand in an ongoing way.

The Unique Role of Consultants in Foundation Learning

It is clear that fieldwide thinking on organizational learning has come a long way from the days of single-loop learning theory. So with an abundance of models to choose from, why don't foundations simply pick one that resonates, task a group of staff to create a learning agenda, or even better (if resources permit), hire for a new position dedicated to instilling an institutionwide learning culture?

The short answer is that learning is hard. A more complete answer is that some of the roadblocks to fostering an internal learning culture – such as the "mystification" of learning, leadership groupthink, or defensive routines – are inherently tricky to change solely from within. Consultants are particularly well positioned to help foundations at various points in the learning process. They help organizations understand and create models and frameworks, implement strategies and mechanisms within them, overcome roadblocks to learning, and put them on a path toward a dynamic and sustainable learning culture.

Based on what we've seen and heard in the field, there are several unique ways in which consultants facilitate a learning culture in foundations.

Using Frameworks to Advance Thinking

It is a bit of a cliché that every consultant has her own 10-step program or patented guide to solving all organizational challenges. While these frameworks sometimes deserve the derision inherent in the cliché, the fact is that, more often than not, they help organizations view themselves in new and different ways. As humans we use heuristics and cognitive modeling to predict everything from what happens when you turn on the faucet to how to achieve social-behavioral change related to HIV transmission in sub-Saharan Africa with a $10,000 grant. This internal predictive analysis chunks relevant information for easy digestion and processes it to come to a likely conclusion.

When consultants use frameworks, there is the potential to advance thinking and learning in three ways. First, the frameworks themselves can help foundation staff organize information into manageable and actionable groups. When staff is able to view smaller pieces of the puzzle, patterns are more easily recognized and implications can be more apparent. Second, frameworks can spur a cognitive jolt. By offering a new way of viewing information, the consultant's framework helps foundation staff break out of what Patrizi, et al. (2013) call the autopilot effect. Third, frameworks help facilitate a common language. Sometimes they do this by simply making the implicit, explicit. At other times they introduce a new language shared broadly across the foundation or they co-create a new language as frameworks are applied. Regardless, being able to have a common lexicon is critical to facilitating learning in a foundation. For example, when a foundation talks about "sustainability" or "targeted social change," learning will be like two ships passing in the night if there isn't agreed definition of the terms.

For example, we helped to create a framework for one Midwest foundation to move from a grantmaker to a "change maker." The change-maker language was already in use as part of the organization's strategic plan but, in the process of crafting the framework, it became clear that most staff were still unsure about what this term meant and how the transition would impact their day-to-day activities. The framework enabled a confused staff to come to a collective understanding of what they meant by "change maker," which involved collective action, seeding innovation, and disrupting systems. The framework also spurred a cognitive jolt when it revealed serious internal divisions that would have to be overcome to effectively put the strategic plan into action.

Cross-pollinating

Because they work across multiple organizations and frequently touch different parts of the foundation, consultants have the ability to transfer knowledge, ideas, and partnerships. This cross-pollination function is critical to learning for several reasons. The exchange across different actors speaks to several aspects of Milway and Saxton's (2011) four goals of mapping knowledge,

Consultants combat groupthink by bringing in fresh perspectives, ideas, and even relationships to disrupt negative patterns.

sharing good practices, facilitating collaboration, and learning alongside other organizations. It can even serve to facilitate the influence aspect of learning by bringing best or promising practices from one organization or part of an organization to another, thereby multiplying impact. The cross-pollination role of consultants also addresses a tendency toward groupthink. As described by Beer and Coffman (2014), "groupthink happens when the desire for harmony in a decision-making group overrides a realistic appraisal of alternative ideas or viewpoints" (p. 9). In their conclusion, they explicitly encourage foundations to invite an outsider's perspective. Consultants combat groupthink by bringing in fresh perspectives, ideas, and even relationships to disrupt negative patterns.

For example, we worked with a community foundation that was looking to increase its leadership role and relevance in its community. While all stakeholders could agree that growing economic and social disparities were plaguing the community, that these disparities broke down along ethnic lines, and that the foundation had the perceived neutrality and social capital to address this issue in a constructive new way, "racial equity" was a polarizing concept among foundation leaders. Part of our planning work with this institution involved highlighting relevant examples of how other funders had addressed racial equity. It helped leadership see the specific programs and outcomes of others, making the idea of addressing such an entrenched and fraught issue more manageable.

In its simplest form, this is about bringing in an outsider's perspective. However, that oversimplification masks the distinctions of where

Consultants bring external data and players into conversation with the foundation. They share emergent ideas that they see in their work across multiple organizations or facilitate new relationships between those working in similar areas, building connections, and even promoting fieldwide learning.

the outside perspective is coming from, what gives it validity, and how it is transferred. A more nuanced exploration reveals many aspects of cross-pollination, four of which we highlight here.

1. Consultants can bridge data and ideas that sit in different operational areas of the foundation (e.g., operations, human resources, finance, communications, and leadership). They also connect dots across and within programs. In both cases, cross-pollination is facilitated by the consultant engaging distinct groups and passing information among them. This can expose areas of shared data or knowledge gaps, or translate interesting practices from one part of the foundation to others.[1] For example, we recently worked with an education funder to help clarify goals and program strategies. While the evaluation staff at the foundation collected data and reported back to the board on program outputs, this information had never been utilized to frame conversations about goals and strategies. In our consulting work we mined the evaluation data to demonstrate the various ways the foundation could define success, and helped leadership develop a theory of change that ultimately led to changes in program strategies.

2. Consultants can facilitate a process of making collective meaning from information among different groups within the foundation, leading to greater clarity and a more integrated strategy. At a minimum this looks like increased awareness of what everyone is doing. Far better is when facilitation informs a shared vision and engenders institutionwide understanding of organizational strategy and the specific structures and processes that support it. For a community foundation in the Northeast, we worked with the strategy team and senior staff to articulate a vision for what an "embedded" strategy would look like, one in which multiple departments in the foundation owned commitment to the strategy and demonstrated it in their interactions and relationships with each other.

3. Consultants bring external data and players into conversation with the foundation. They share emergent ideas that they see in their work across multiple organizations or facilitate new relationships between those working in similar areas, building connections, and even promoting fieldwide learning. For example, we were hired to help a new, foundation-supported LGBTQ funding initiative identify opportunities to build support for LGBTQ-movement goals across various social-justice efforts. This work drew on our experience working within the immigration, criminal justice, gender rights, and economic justice fields, enabling us to identify potential intersections and synergies that people enmeshed in a particular sector might not see. Consultants can also help the foundation identify and leverage extant data sources to inform its work.

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[1] *We have found that in many projects consultants work closely with a subset of staff from the client organization, such as a planning or steering committee, with a larger group of stakeholders brought in to attend a final presentation of findings and recommendations. Instead of engaging stakeholders only at the end of a project, a consultant deliberately seeking to facilitate learning will keep key organizational leaders and staff in the loop throughout the process. For example, at important points in the engagement the consultant might draft a memo for clients to distribute across the organization; such strategic communication serves to manage expectations of a larger pool of employees and relay specific project goals.*

TABLE 2 How Consultants Cross-Pollinate to Create Learning

	Internal Resource/Audience (Within a Single Foundation)	**External Resource/Audience (Between a Foundation and External Stakeholders)**
Cross-Pollination Roles		
Data broker	▪ Identify data needs from different parts of the foundation. ▪ Share relevant data from different parts of the foundation, like operations, finance, and communications. ▪ Expose shared indicators and measures, flag knowledge-sharing gaps.	▪ Identify relevant extant data sources that the foundation might be able to use. ▪ Help foundations understand where the data they have might be useful for external audiences. ▪ Reduce duplication of data collection among actors in the foundation's ecosystem.
Idea broker	▪ Share specific operational or programmatic strategies that are working in one area of the foundation with other areas. ▪ Flag good ideas from unexpected or less visible sources, like junior or administrative staff.	▪ Bring emergent ideas from the field and perspective informed by experience. ▪ Identify hidden leverage points for foundation resources within a broader ecosystem.
Analysis and action broker	▪ Facilitate collective meaning-making from activities across the foundation. ▪ Facilitate understanding of shared vision, strategy, structures and processes. ▪ Facilitate alignment of strategies across the foundation. ▪ Use strategic communications to inform staff and cultivate buy-in at pivotal moments.	▪ Facilitate new relationships and information-sharing between organizations. ▪ Help clarify the specific contributions/niche of the foundation within the foundation ecosystem.

4. Consultants can help foundations understand the strategies of other stakeholders operating in similar systems. They can contextualize the foundation's strategies vis-à-vis the other players in a particular "ecosystem" – grantees, academia, community organizations, grassroots groups, governments, businesses – helping the foundation learn about its niche, its strengths and challenges, and how to leverage impact on its own or in concert with others. For example, one consultant told us that he felt some of the greatest "value" he'd added to clients had come not from helping them develop a strategic plan, but from more anecdotal conversations with staff and board about how their organization was situated in the larger philanthropic landscape – giving them perspective on trends and peers in the field.

Cross-pollination roles can be deliberate or ad-hoc. While consultants may be hired to do a finite task, they bring with them years of experience working with different funders, privy to all aspects of their operations. To synthesize the cross-pollination roles of consultants, we can divide cross-pollination by type and by audience (see Table 2). We divide the type of cross-pollination into activities that share data (data broker), activities that raise up ideas (idea broker), and activities that facilitate analysis and action (analysis and action broker). We divide audiences into a purely internal audience (cross-pollination within a single foundation) and an external audience (cross-pollination between a foundation and other stakeholders, including other foundations).

All of the sharing, frameworks, and data gathering are for naught if they aren't delivered with an authentic commitment to truth telling. Consultants are uniquely positioned to be able to deliver bad news and are sometimes hired with the express purpose of delivering someone else's bad news.

Neutral Gathering of Data From Distinct Stakeholders

According to field experts, foundations are particularly prone to linearity and certainty bias (Patrizi et al., 2013) or confirmation bias (Beer & Coffman, 2014). Such bias means seeking out data that will confirm one's point of view or overly scrutinizing data that run counter to it. One reason for this may be the lack of external accountability mechanisms in the foundation's operating environment. In nearly all types of consulting engagements, consultants will engage in some form of data collection – either to develop appropriate interventions or to form the basis for strategic analysis. The consultant's value lies not so much in the gathering of data per se, but in how he gathers and processes it. Good data collection for learning solicits all relevant sources and impartially assesses information; it does not seek to support a particular approach or answer. Foundations can use consultants to collect and organize data from a variety of actors with the expectation that the consultant will do so in an unbiased way.[2] Of course, the learning benefit of neutral data collection can be negated by subjective interpretation or misapplication. It is incumbent upon both consultants and foundations to actively seek out distinct

perspectives and give appropriate credibility to the results of neutral data gathering.

Delivering Bad News

"You want me to say what?!" Foundation staff and consultants alike have all been there: The evaluation results on a particular project were less than rosy, and the boss is putting you in front of the room to deliver the findings. Many consultants have experienced being caught in the crosshairs of reporting underperformance, someone else's mistake, or a lack of insight at one point or another. We can only hope that they don't shoot the messenger (or worse, fire us). One of Ross and Mukherjee's (2012) 10 traits of a great consultant is to be equally adept at delivering good and bad news. All of the sharing, frameworks, and data gathering are for naught if they aren't delivered with an authentic commitment to truth telling.

Consultants are uniquely positioned to be able to deliver bad news and are sometimes hired with the express purpose of delivering someone else's bad news. Argyris and Schön's (1978) double-loop learning approach requires eschewing the "win, don't lose" mentality, and Beer and Coffman (2014) indicate asking for bad news and seeking disconfirming evidence are ways to combat cognitive learning traps. By delivering bad news confidently, framed in an actionable way, consultants can model double-loop learning for organizations. Beyond this, consultants can also create the safe environment necessary to discuss and digest a difficult issue. As a neutral third party, they can more safely navigate through the sometimes emotionally charged waters of disappointment. When consultants shy away from bad news, or when they frame bad news through a positive lens, they implicitly send a message that bad news is just bad news and nothing more, losing the silver lining of learning.

For example, we conducted an assessment of a foundation's unique place-based model. This model required an extensive community-planning

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[2] *We acknowledge the notion that everything is biased in some form or other.*

process and collaboration among various local agencies. Our client was quite certain that this model was an effective way of addressing local needs, and from the outset planned to publish a report on its success. Our assessment, however, found that its local partners found the approach to be top-down, cumbersome, and predicated on inauthentic collaboration. This was not the news our client wanted, and it was difficult to deliver; but it ultimately resulted in improvements to the program.

Bridging Grantee and Foundation Learning Objectives

It is no secret that there is a power dynamic between foundations and their external stakeholders, primarily grantees. In terms of learning, this can mean foundation priorities overshadow those of grantees. This phenomenon is common when evaluation work by foundations excludes grantees in formulating evaluation questions or indicators. Consultants can help create a more open learning channel between grantees and foundations.[3] Open learning channels focus on getting the right information at the right time to inform mission achievement. This requires the foundation to acknowledge grantees not as extensions of the foundation's mission, but as collaborators in pursuit of overlapping missions. Consultants create learning channels by acknowledging differences and similarities between foundation and grantee learning objectives; by inviting grantees into the conversation (e.g., soliciting feedback when developing evaluation questions or framing strategic areas of inquiry); and by ensuring that data are shared with both foundation and grantee stakeholders. With one Midwest health foundation, for example, we facilitated focus groups with grantees at which they and foundation staff discussed the foundation's intention to become more of a learning organization, and worked together on prioritizing goals and strategies that should inform the foundation's logic model.

Facilitating Reflection

Consultants come to the table armed with tools, activities, and processes all intended to move

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their clients toward improvement. The Change Handbook (Holman, Devane, & Cady, 2007) explores more than 60 methods for facilitating whole-system change. At the heart of them all is a methodology for engaging in systematic reflection. Consultants have the vantage point and skills to help foundations hold up a mirror and see their own practice. Because they are invited in, consultants don't experience the same power dynamic inherent in the grantee-foundation relationship; they may feel more empowered to share an unvarnished critique. As outsiders they are less encumbered by institutional dynamics including relationships, culture, and history – all elements that invariably affect how

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[3] *Learning channels should not be confused with communication channels, which work to ensure that there is clear and open information-passing between the foundation and stakeholders.*

foundation staff perceives its own operations and effectiveness. For example, in working with an intermediary that received funding from anonymous sources – a relationship characterized by a high level of confidentiality and discretion – we were able to channel thoughtful feedback from grantees and provide our own perspective, respecting confidentiality while being open and communicative.

Asking Questions Others Are Unwilling to Ask
Similar to delivering bad news, an unwillingness to ask hard questions can be a serious impediment to a culture of learning. There are two types of hard questions that consultants can ask to help facilitate learning. First, they can ask questions related to "sacred cows." These questions can relate to pet projects, sensitive issues (such as resource allocation or underperformance), or implicitly held assumptions. In raising these questions, consultants demonstrate that it is O.K. to talk about these topics and allow issues to be raised without repercussions such as damaged interpersonal relationships. Second, consultants can ask questions across power dynamics. Whether speaking to the board, the chief executive officer, or other senior leaders, consultants can ask questions of stakeholders without being caught in organizational power plays and turf wars.[4] While asking questions related to power dynamics is generally interpreted as querying those in positions of greater power, the reverse can also be true. In one of our consulting engagements, for example, a junior program officer with a long history at the foundation had developed close relationships with several board members. A new foundation president was having a hard time understanding the value of a particular strategy the program officer had been leading for several years. Assuming there was some good historical reason for the program and not wanting to rock the boat – and perhaps cognizant of the board relationship – the president refrained from asking probing questions about the strategy. As consultants, we were able to play the "dumb" outsiders and ask those probing questions. The unanticipated result: a dialogue in which the program officer revealed that the strategy was solely being continued for

legacy reasons, that it had little strategic value, and that she wished it could be eliminated!

Implications for Competencies
Even with good consulting engagements, learning doesn't just automatically happen. It requires thought, purpose, and capability on the part of consultants to deliver on the unique roles described above. It also requires competencies on the part of the foundation. Below is a set of core competencies we consider highly important for consulting relationships to foster a culture of learning within foundations (see Table 3).

Competencies for Foundations
- Extrapolate from frameworks. Earlier in the article we discussed the use of frameworks. Ultimately foundation staff needs the competency to be able to apply models to the organization. It might be argued that the skill of extrapolation from those models is among the most important for a functional learning culture. Encouraging staff to hone the mental

TABLE 3 Competencies for Facilitating Learning: Foundation Staff and Consultants

Foundation Competencies
▪ Be able to extrapolate from frameworks.
▪ Give access to diverse stakeholder groups.
▪ Recognize that learning is not a checklist, but a practice.
▪ Facilitate relationships across consultants.

Consultant Competencies
▪ Don't be dogmatic about your framework.
▪ Protect confidentiality.
▪ Be responsive to your client contact without playing favorites.
▪ Resist giving "the answer."
▪ Ask probing questions.
▪ Be frank about barriers to strategic learning.

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[4] *While we acknowledge that consulting-client power dynamics exist, we do not explore them here.*

exercise of extrapolation with the guidance of consultants can be an effective way of developing this skill. Staff must understand, however, that this means the onus of giving a "right" answer shifts from the consultant to a shared staff-consultant endeavor.

- Give access to diverse stakeholder groups. Foundation employees may be wary when asking consultants to solicit colleagues' opinions or candid assessments. Still, it would be wise to check any instinct to exclude perspectives that might challenge the status quo. To facilitate learning, giving access to and even encouraging consultants to interact with a variety of stakeholder groups is good practice. Generally this means giving the consultant permission to collect data with high levels of confidentiality in place. This competency goes hand-in-hand with the consultant's obligation to handle diverse stakeholder groups with discretion and care.

- Recognize that learning is not a checklist but a practice. Learning is "real work" and part of strategy rather than an optional add-on. This requires demonstrating an authentic intent to learn. In practice, this means learning should be an explicit part of the consulting agreement with some resources dedicated to it. Further, when findings are received, the first question should focus on "what can we learn from these?" versus "what is wrong with this information set?" It is not hard to identify flaws in most data, either due to methodology concerns, problems with question phrasing, or other issues. However, how one engages the consultant in the data says a lot about the foundation's learning commitment.

- Facilitate relationships across consultants. One consultant we queried voiced frustration that foundations frequently keep their consultants working in isolation. It is not uncommon for a foundation to have multiple consultants operating at the same time. Given the realities of operating in a complex environment, even with distinct projects consultants are likely to have work that overlaps (or could be leveraged).

> *Do not be dogmatic about your framework. Just as good consultants will use frameworks to help advance the thinking of their clients, they should also understand the limitations of those frameworks.*

For example, we were engaged to facilitate a strategic planning process for a client that was simultaneously engaged in board assessment and development with a governance consultant. Not surprisingly, the issues that emerged in planning had direct bearing on the board's function and effectiveness. By working closely with the governance consultant we were able to share relevant information and sequence the processes so that leadership was making decisions in a linear, logical manner. In the worst case, multiple consultants duplicate effort or overwhelm the foundation with too much information, both of which impede an effective learning culture. Foundations can address this by bringing consultant teams together periodically to discuss their respective work.

Competencies for Consultants

- Do not be dogmatic about your framework. Just as good consultants will use frameworks to help advance the thinking of their clients, they should also understand the limitations of those frameworks. By forcing full fidelity to any given framework, a consultant can send a message that there is only one right way to view a particular issue, thereby shutting down the learning process. Frameworks are tools – they are not solutions in and of themselves.

- Protect confidentiality. Consultants have a responsibility to protect the confidentiality of the people from whom they gather sensitive information. While one might argue that

While being responsive to the direct client is critical, consultants do a disservice to learning when they conflate the needs of the primary client with a valuing of their perspective over other foundation perspectives. The effective learning-oriented consultant will seek to balance perspectives and help the primary client see a variety of viewpoints.

confidentiality is contradictory to an open environment of learning, such an argument ignores the sociocultural complexity inherent in the foundation environment, which is exacerbated by the power differential between grantmaker and grant recipient. Power differentials can also exist between program staff and other functional support staff or between staff and board. In our experience, when the consultant protects confidentiality a natural and candid dialogue can occur that is grounded in understanding what was said rather than who said it.

- Be responsive to the primary client without playing favorites. As consultants, we need to be responsive to our clients. And while it may be the overall foundation budget supporting the contract, it is generally clear who the primary client is. While being responsive to the direct client is critical, consultants do a disservice to learning when they conflate the needs of the primary client with a valuing of their perspective over other foundation perspectives. The effective learning-oriented consultant

will seek to balance perspectives and help the primary client see a variety of viewpoints.

- Resist giving "the answer." Everyone likes to be right – even better to be smart and right. Consultants are no different and may be tempted to offer simple answers to complex questions. To develop a learning culture, however, consultants should exercise the self-restraint to facilitate a nonlinear process involving thorough exploration of ideas, data, and answer development. Ultimately the consultant may need to give an answer, but leading clients through the mental process to arrive at it demonstrates how to learn and a commitment to a culture of learning. In rare cases there may be a single solution, but more frequently there are multiple valid answers. Even when the consultant does point to one answer, she might also express openness to other ideas, thus leaving the learning door ajar.

- Ask probing questions. Asking key questions is a staple of almost any consulting engagement. In our experience, asking the same question in different ways can yield surprisingly different responses with wide variation in usefulness for learning. For example, reframing yes/no questions into how/why questions is one simple way to paint a richer, more complete picture of a problem and understand history, decision-making rationale, processes, and motivations. Consultants should ideally ask these questions armed with a solid grasp of the interviewee and the institution, as well as a key data points or assumptions in mind to provoke conversation with a recalcitrant party or gauge reaction to a particular idea (without falling into the trap of leading questions). Engaging in this kind of artful questioning can unearth issues directly salient to organizational learning.

- Be frank about barriers to strategic learning. There is no way for a consultant to "make" a client learn from an engagement. Even extremely motivated clients may run into barriers and, ultimately, not move ahead with recommendations. For this reason, consultants can prompt stakeholders to consider potential

barriers at the beginning and middle of an engagement. For example, if a client does not expect to have the capacity to track outcome indicators over the long term, it is better to know that upfront and, in turn, design deliverables that will be easier to use and add value in the short term.

Conclusion

Just as learning is a perpetual process, so frameworks and models for learning in an organizational context are continually evolving. Credit is due to Senge (1990), Schein (1969), and the early pioneers of organizational culture who bridged theory and practice to construct models foundations can actually use, and to practitioners who have since built on those frameworks to incorporate ideas about sustainability, adaptability, networks, technology, and reliable and valid methods.

And yet, as fieldwide approaches to learning have evolved and multiplied, we have frequently seen foundations act adversely in two distinct ways. They may quickly adopt a particular framework or model and seek to apply it without a deep understanding of its purpose or components. This results in over-simplification of learning, turning it into a checklist or a plan that never becomes truly operationalized and embedded into daily practice – picture a feedback loop leading to nowhere. Another reaction is to eschew a robust learning culture because of the "overwhelm factor" – rationalizing that organizational learning is too complex and mystical to be comprehended, let alone implemented. After all, it seems safer (and easier) to stick to the strategy you've already invested in. Accountability issues and funder-grantee power dynamics may make foundations especially prone to these reactions, which result in significant missed opportunities for learning, impact, and innovation.

As we have illustrated, consultants are well equipped to help foundations avoid these cognitive and operational traps. With their particular skill set they help demystify models and frameworks and break down complex concepts into manageable and actionable pieces,

creating concrete ways to capture, share, and use knowledge within and across groups. As outsiders they bring a neutral third-party perspective and a wealth of field experience, shining a light on foundation practice and diagnosing underlying issues that may be impeding a learning culture. The good news is that these roles imply particular competencies that both foundations and consultants can develop and hone. To this end, we offer five starting activities that any foundation can undertake to increase the level of learning derived from consultant engagements:

1. Inventory all your existing consulting contracts and identify what your learning objectives are for each.

2. Make learning an explicit part of all future consultant requests for proposals, agreements, and contracts.

3. Identify potential barriers to learning as a standard part of any new consulting engagement. This could be done both internally among foundation staff as well as with the consultant.

4. Identify ways to create consultant synergies. Synergies can be created by identifying foundation staff that, while not directly related to the consultant issue, may benefit from being at the table. They can also be created by connecting varied consultants with each other.

5. Conduct a debrief or after-action review following each consulting engagement to discuss and document learning from the engagement.

What does the future of learning cultures at foundations look like? In our own work, we see more foundations seeking to understand their particular environmental niche and how to amplify their impact within networks and ecosystems. In this scenario, embracing and practicing a learning culture will only become more important, and the ways consultants add value in this interrelational landscape will no

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doubt expand beyond the seven areas we outline here. Still, we anticipate at least one constant in that future: a shared commitment to real learning and a spirit of inquiry, partnership, and collaboration between foundations and consultants.

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