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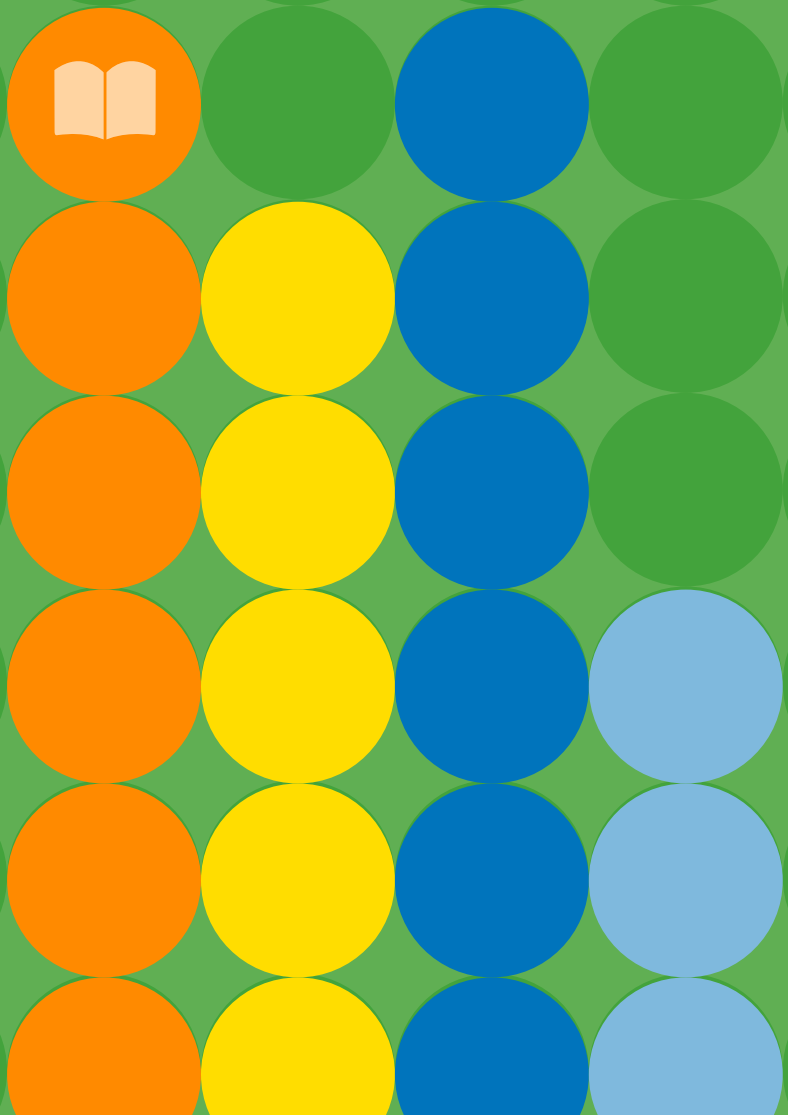
# OPEN FOR GOOD

## KNOWLEDGE SHARING TO STRENGTHEN GRANTMAKING



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Knowledge has the power to spark change, but only if it is shared. In this GrantCraft guide, grantmakers share how and why their foundations openly share knowledge as an integral and strategic aspect of philanthropy. Learn from their firsthand experience how to grow organizational capacity and culture for knowledge sharing, address common concerns, and use knowledge exchange to advance your mission and impact.

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# Why Focus on Knowledge?

Today, we have unprecedented access to information. From the smartphones we hold in our hands to the continuous stream of media available through other screens, we can retrieve innumerable data, facts, and opinions at nearly any time we wish. And access them we do.[1] At the same time, though, we often desire to escape from information overload because we sense that it impedes rather than helps us live our best lives.

Enter knowledge. Knowledge is different from information and data. Data consist of words and numbers that in and of themselves hold no meaning. These words and numbers become information when given context and imbued with interpretation. Knowledge results when information is combined with experience, and transformed into actionable insight. According to Hanh Cao Yu of The California Endowment, knowledge is created through intentional "reflection, analysis, and thinking about implications for practice." In other words, knowledge holds value. Sharing that knowledge thus offers a rich possibility of improving results, influencing decisions, and otherwise effecting change—an apt description of the goals of philanthropy, broadly speaking.

***"Knowledge resources can be applied in the same spirit of improving the conditions of life and of the world for future generations."***

Harvey Fineberg, Gordon and Betty Moore Foundation

Philanthropy is uniquely positioned not only to generate knowledge, but also to disseminate it. Foundations deploy financial resources and human intelligence to test solutions to pressing social, economic, and environmental issues. They gather data and compile information about their efforts, reflect on what they are learning, and apply those lessons in service of achieving greater impact. Consider the sources of knowledge that foundations commonly generate:

- **Program and grantee evaluations.** Independent evaluations of foundation programming and grantee work.
- **Strategy development.** Scanning the landscape, issue analysis, or other research commissioned as part of strategy development.
- **Foundation performance assessments.** Assessments of foundation performance that incorporate grantee and community feedback.
- **Thought leadership.** Authority and ideas for change that arise from the perspective and experience of foundation leaders.
- **Internal learning.** Formal and informal reflections that are shared among foundation staff and board members.
- **External learning.** Discussions that take place externally with community stakeholders, nonprofits, and foundation peers.

**WHY FOCUS ON KNOWLEDGE?**

**Click here** to hear funders' perspectives on the importance of knowledge and why foundations should focus on knowledge for the benefit of their work, as well as the sector at large.

The lessons emerging from these sources have potential bearing on the efforts of other foundations and on research and community initiatives across diverse fields. Foundations provide new and valuable perspectives that especially shine when they reach beyond their immediate professional circles. But too often, the knowledge foundations develop starts and stops with the originator.[2] When this happens, people and organizations across the social sector miss out on insights that can advance their work, and foundations pass up a chance to make a broader, mission-aligned impact. "As much as we say that grantmaking isn't all that foundations do, it seems to be most of what they focus on," remarks Jara Dean-Coffey of the consultancy Luminare Group, which specializes in working with foundations to share their knowledge. "There are a host of tools available, and communication is one that is underutilized." Harvey Fineberg of the Gordon and Betty Moore Foundation concurs, "Knowledge resources can be applied in the same spirit of improving the conditions of life and of the world for future generations. It is about enabling others to do better, and sharing knowledge is an important way to do that."

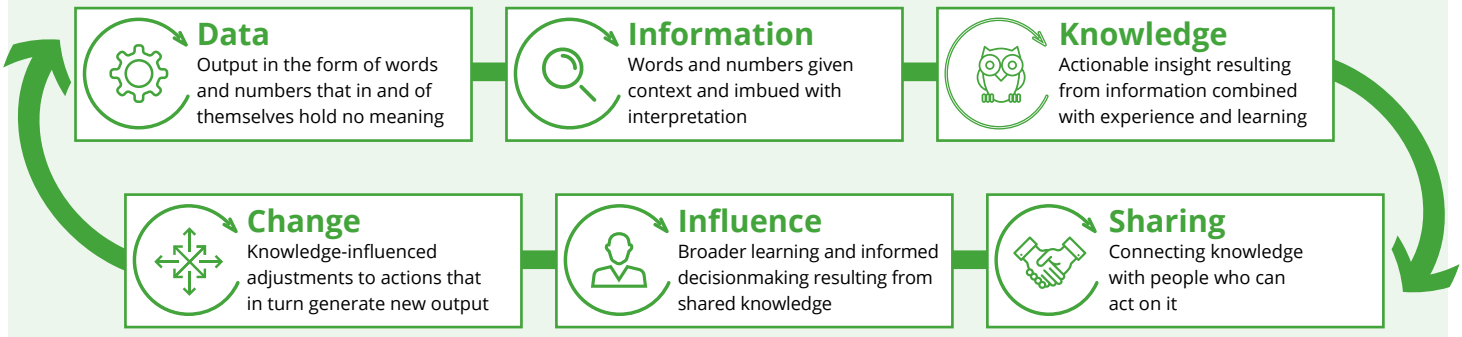
Inspired by these voices, this guide is designed to help foundations recognize and use the power of knowledge to drive broader impact across the social sector and in line with their missions. While the intended audience is primarily foundation staff and trustees, nonprofits and policymakers can also benefit from the ideas, tools, and resources herein.

## METHODOLOGY

This guide was developed as part of **#OpenForGood**, a campaign to encourage foundations to openly share their knowledge. As with other GrantCraft guides, it primarily draws on interviews with philanthropic leaders working across diverse fields and foundation settings. It also benefits from informal input and thought leadership shared in other stages of the #OpenForGood campaign, including the design and launch of **IssueLab: *Results*** and a **Glasspockets blog series**. Additional articles and other resources referenced in this guide were shared in the context of our interviews or the broader campaign, or otherwise frame our work in philanthropy as a home for knowledge sharing. A list of people who contributed to this guide's development appears on page 40.

The guide lays out the benefits of knowledge sharing in philanthropy for both the receivers and sharers of knowledge. It also explores barriers that get in the way of foundations sharing knowledge and strategies to overcome those barriers. Sprinkled throughout are ideas to borrow from grantmakers (shared knowledge!) and practical examples of how foundations of all sizes and types are experimenting with new ways to share insights. Finally, this guide will help grantmakers understand where they fit within philanthropy's knowledge sharing landscape and encourage advancing their organizational capacities and practices.

## KNOWLEDGE TO INFORM DECISIONMAKING AND CATALYZE THE GREATER GOOD



# What Kind of Knowledge Sharer Are You?

A foundation's tendency to share knowledge is strongly influenced by two factors: its capacity to share knowledge and its culture around knowledge sharing. Capacity refers to the processes, staff, and resources needed for foundations to share their knowledge, while culture refers to internal values, leadership, and overall interest that support sharing. By taking a closer look at key components of capacity and culture, foundations can identify their strengths and challenges with regard to sharing knowledge. In turn, these qualities shed light on opportunities to become a stronger knowledge sharer. To make a quick self-assessment of your foundation, follow these steps:

## TAKE THE QUIZ

### What kind of knowledge sharer are you?

Next to each statement below, mark 'YES' if true for your foundation.

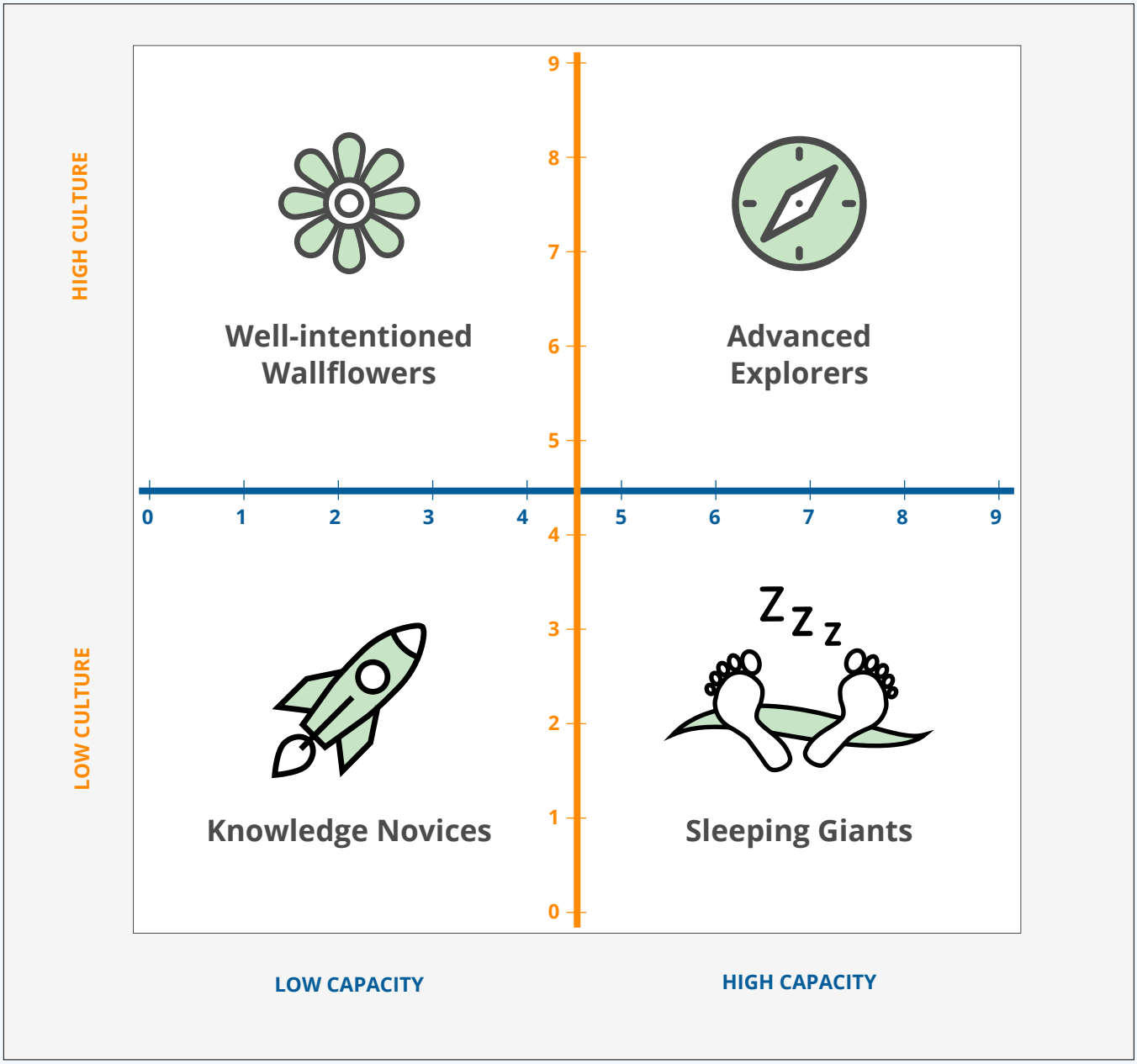
| CAPACITY STATEMENTS | YES |
|---|---|
| **1.** Our foundation has a website that we use to share what we are learning. | |
| **2.** We have an active social media presence. | |
| **3.** We have staff designated to lead communications and learning. | |
| **4.** Staff share knowledge externally in a range of ways. | |
| **5.** Our grantee reports are designed to easily share publicly. | |
| **6.** When preparing resources, our standard process is to consider usefulness and audience needs. | |
| **7.** We convene or participate in conferences that support in-person sharing. | |
| **8.** We routinely share reports on open repositories and other relevant sites. | |
| **9.** We openly license our knowledge products so that others can easily build on our work. | |
| CAPACITY SCORE (TOTAL NUMBER OF 'YES' ANSWERS) | |

| CULTURE STATEMENTS | YES |
|---|---|
| **1.** Openness and learning are explicit values of our foundation. | |
| **2.** We see engagement with the field as core to our impact. | |
| **3.** We value the knowledge of others and actively seek it out. | |
| **4.** Our leaders model knowledge sharing both externally and internally. | |
| **5.** We designate time for staff to reflect and share knowledge. | |
| **6.** We are not afraid to share what didn't work. | |
| **7.** We are interested in experimentation and taking risks. | |
| **8.** We are interested in building the fields of practice in which we work. | |
| **9.** We believe we have a responsibility to share what we are learning. | |
| CULTURE SCORE (TOTAL NUMBER OF 'YES' ANSWERS) | |

## FIND YOUR TYPE ON THE GRAPH

### Organizing knowledge sharers by capacity and culture

In the quiz on the previous page, calculate your capacity and culture scores (number of 'YES' answers in each section). Then, on the graph below, find your culture score on the vertical orange line and your capacity score on the horizontal blue line. The quadrant that contains both your scores tells you the type of knowledge sharer your foundation is.



## INTERPRET YOUR RESULTS

These suggestions, corresponding to your quadrant on the graph, offer guidance about how your knowledge sharing status can help you strengthen and grow your practice. Look out for these symbols throughout the guide for content that is relevant to each type of knowledge sharer.

| KNOWLEDGE SHARING TYPE | WHERE YOU STAND | IDEAS FOR SHARING MORE KNOWLEDGE |
|---|---|---|
| <br>**Advanced Explorers**<br>**HIGH CAPACITY**<br>**HIGH CULTURAL SUPPORT** | Knowledge capacity and culture are strong and can serve as a model and testing ground for others.<br>*"Each foundation needs to think about its posture on knowledge sharing, what matters to that organization, and how they believe they can best fulfill their mission and objectives."*<br>HARVEY FINEBERG, GORDON AND BETTY MOORE FOUNDATION | • Share your expertise about knowledge practice with other foundations through blogs and by leading by example and joining the **#OpenForGood** movement, committing to share what you are learning.<br>• Take time to set annual knowledge goals at foundation and staff levels.<br>• Advance your practice by testing new approaches, attending to knowledge use, and amplifying valuable, underappreciated perspectives. |
| <br>**Well-intentioned Wallflowers**<br>**LOW CAPACITY**<br>**HIGH CULTURAL SUPPORT** | Though nuts and bolts to share knowledge are limited, the strong buy-in among leaders and staff can go far in creatively mobilizing available resources.<br>*"The question is how might we open doors to share with other people."*<br>REV. STARSKY WILSON, DEACONESS FOUNDATION | • Choose low-resource ways to share knowledge such as through email blasts, piggybacking on existing meetings, or adding to repositories such as IssueLab.<br>• Strategically limit resource preparation by focusing on a particular audience and sharing minimally edited or trimmed existing reports.<br>• Spread responsibility among staff to reduce the burden and spread the benefit. |
| <br>**Sleeping Giants**<br>**HIGH CAPACITY**<br>**LOW CULTURAL SUPPORT** | With the structure in place to carry out more knowledge sharing, the remaining challenge is to get leadership and staff to recognize and embrace the benefits.<br>*"Knowledge sharing does require some effort and until you do it you don't necessarily perceive the benefits of it."*<br>LARRY KRAMER, WILLIAM AND FLORA HEWLETT FOUNDATION | • Schedule time for internal discussion of the benefits of knowledge sharing.<br>• Identify low-barrier steps to expand knowledge practice, such as designating time for staff to share internally, encouraging knowledge consumption, and modeling sharing of resources that involve no risk to staff or grantees.<br>• Start a working group of interested staff to strategize and champion knowledge sharing. |
| <br>**Knowledge Novices**<br>**LOW CAPACITY**<br>**LOW CULTURAL SUPPORT** | Bolstering capacity and cultural support can take many forms in the early stages of knowledge sharing.<br>*"People don't realize they have insights that are worthy of being shared."*<br>ALLISON BARMANN, BUSH FOUNDATION | • Increase knowledge consumption to learn what others are sharing, then share these findings internally.<br>• Take opportunities to present your experience and insights at meetings and conferences.<br>• Partner with colleagues or affinity groups to develop resources to share. |

## KEEP CHECKING AS YOU EXPLORE AND GROW

This self-assessment tool can help a foundation gauge its growth in knowledge sharing over time and consider its capacity and culture from multiple viewpoints. By revisiting this knowledge sharing assessment periodically and engaging others in the thought process, a foundation can expand its self-awareness.

## DISCUSSION QUESTIONS

- Do the quiz questions address what feel to you like important aspects of knowledge sharing?
- Do the knowledge sharing types make sense to you? Why or why not?
- Did the result of using these tools surprise you? How so?
- Do trustees and staff members across the organization mark the same responses on the quiz? If not, how will the different perspectives inform each other?
- Would peer foundations, nonprofits, and the public at large score the foundation similarly? If not, what are the sources of the discrepancies and how might they inform opportunities?
- How would you like to grow in sharing knowledge?
- What specific steps can you take toward that goal in the near term?

# Why Share Knowledge? (Hint: It's Good For You)

Because grantmakers are in the business of giving, many instinctively like the idea of sharing philanthropic knowledge with others. But in the face of competing priorities, a stronger case must be made for foundations to devote time and resources to sharing knowledge. Why exactly is knowledge sharing important? Who benefits and in what ways?

## KNOWLEDGE SHARING HELPS THE SHARER

When foundations share their knowledge, they benefit not only others but also themselves. Though the typical intent of knowledge sharing is to help others, what is often overlooked is that sharing knowledge beyond a foundation's walls also can advance the effectiveness and impact within those walls. It can deepen internal reflection and learning, lead to new connections and ideas, and promote organizational credibility and influence. Indeed, knowledge sharing:

**Compels internal reflection and learning.** To share knowledge, foundations must first reflect on the data and information available to them and use their broader experiences to identify actionable insights that hold relevance for themselves and others. Spending time to analyze and distill insights is a powerful aspect of the work. Bernadette Sangalang of The David and Lucile Packard Foundation observes that knowledge development involves beneficial internal reflection.

**WHY SHARE KNOWLEDGE?**

**Click here** to hear funders discuss why sharing knowledge not only benefits grantees and other foundations but can be useful to the organization sharing the knowledge as well.

**ACTION STEP**

Streamline your grantee reports to what is most critical to learning how to improve the work and, with grantee permission, share these lessons learned on your website.

"You're reflecting on the work when you're sharing knowledge," she says. "That's the great benefit because that adds to your reflective practice." Kim Ammann Howard of The James Irvine Foundation agrees that planning for knowledge sharing "forces us to think about what is most important to share." Maureen Cozine shares one of the ways that the New York State Health Foundation puts internal reflection into practice: "We do what we call grant outcome reports. We work with our grantees once the program is over and ask, 'What did this grant accomplish? What were the challenges? What were the shortcomings? How could we have done a better job of helping you succeed? What came up that was unexpected and had to change course?'" The resulting shared learning then not only strengthens the foundation's and grantee's work going forward, but provides opportunities for

others to learn as well because the foundation shares this knowledge in a grant outcomes section on its website.

**Sparks opportunities for deeper stakeholder engagement.** Sharing knowledge can lead to new connections, ideas, and relationships with potential to advance a foundation's work. Chera Reid of The Kresge Foundation notes, "One of the great benefits to foundations is that to the extent that we have publicly available knowledge about what we're learning, what kinds of questions we're asking, and what we're really struggling with, it's an invitation for people to engage with us." Larry Kramer of the William and Flora Hewlett Foundation adds that sharing knowledge is "a benefit to everybody, including yourself, because there are a lot of people you may not know who will have interesting and important thoughts for you to hear."

**Strengthens credibility and reputation.** Sharing knowledge is also a mechanism through which foundations can establish a reputation for being accountable to stakeholders and transparent about their work. According to Cozine of the New York State Health Foundation, "We have resources that are in the public's trust. We need to be really clear about where that money is going, what's going well and what's not working, and how we're approaching things. We have an obligation to be transparent about that." Tom Kelly of the Hawaii Community Foundation agrees: "Openness and transparency is one element of holding ourselves accountable to the public and to the communities we're either in or serving. It's a necessary part of our accountability." He also observes that when foundations share lessons and insights, "It strengthens your credibility and reputation so that when you do say something, people know whether you're being honest and have credibility."

**Supports efforts to improve foundation diversity, inclusion, and equity.** Like evaluation, knowledge sharing can be an important tool for advancing equity, benefiting foundations by widening their sphere of influence. However, knowledge is not necessarily a universal truth that applies in all situations and contexts. It can be subjective, messy, and vulnerable to bias. Reid comments, "If we have a very hegemonic way of thinking about data and knowledge, it's a real limitation. It can close our eyes and our ears to the kind of listening, hearing, and engagement we need to address the social issues we care about. There's a limitation to talking or listening only within our known circles." She calls on foundations to be thoughtful about equity considerations that come into play when developing and sharing their knowledge. Whose perspectives are represented, and whose might be missing? What evidence is being privileged in the process? Who fails to benefit when foundations withhold their knowledge or limit sharing to a small number of philanthropic peers? Foundations that are thoughtful about these questions have a real potential to advance their equity work, thereby increasing the relevance of their grantmaking to the communities that they serve."

## LISTENING TO COMMUNITY PERSPECTIVES AS A MEASURE OF PROGRAM IMPACT

The California Endowment conducted a community engagement study at the midpoint of its Building Healthy Communities initiative with the intent to understand its impact and hear feedback on how to improve its work. Hanh Cao Yu describes the effort to gather a wide range of community voices:

*We started by speaking with the communities' residents and youth, especially those who are unaffiliated with organizations, because they can be gatekeepers to the communities. That was the core. Then we talked to community leaders and those who are working in nonprofits who are grounded in community. We talked to local systems leaders, to local elected officials, to statewide folks, and to funders. All of those were so valuable, but it was really important to tease out the different perspectives to see how they were similar and different. There are so many nuances in terms of who knows the work the best and who knows the needs of the communities.*

## KNOWLEDGE SHARING IS GOOD FOR COMMUNITIES

Sharing knowledge helps a foundation use its influence for the greater good, supporting its community of stakeholders to make a difference through non-monetary means. Knowledge, for example:

**Informs practices of foundations and nonprofits.** Through knowledge sharing, foundations have an opportunity to help philanthropic peers and nonprofits pursuing similar programs, strategies, and impacts. As Sangalang of The David and Lucile Packard Foundation observes, "Others can learn from the work that our grantees are doing so that they can either not reinvent the wheel, gain insights from it, or learn from where we've gone wrong." In turn, she continues, "We have definitely learned from others sharing their knowledge, whether through reports or even informally talking to other foundation peers in terms of how they've approached strategy or how they've set up evaluations." Allison Barmann of the Bush Foundation agrees: "After you make the investment, you learn from it. You generate knowledge, and you share so that others can leverage it. It helps others to not make the same mistakes or to get to impact faster. To maximize impact is the fundamental reason to share knowledge." For instance, Barmann adds, "Four years ago now, we moved into a new space and started co-locating with another foundation. We have three floors; the middle floor is shared. We wrote and shared a learning paper about the process of figuring out how you design a space together and work together."

### ACTION STEP

Push your foundation to take its learning beyond its foundation peers. Inventory what communities are missing from your distribution mechanisms and find new networks to disseminate your knowledge.

**Advances overall social sector knowledge.** Foundations that share their own knowledge or compile and disseminate that of others also help to advance collective intelligence in the social sector. Some foundations explicitly incorporate field building as a key component of their work. The Arcus Foundation, for example, actively attempts to address information and knowledge gaps in the conservation field by gathering data and insights together in an online portal that others can use to advance their impact. According to Cindy Rizzo, "The field really depends on knowledge. Organizations want to see what we're curating or collating from among all of the different organizations we're funding. We have a different view, a bird's-eye view across organizations."

***"To maximize impact is the fundamental reason to share knowledge."***

Allison Barmann, Bush Foundation

Bernadette Sangalang of The David and Lucile Packard Foundation speaks of the benefits of sharing research that supported the implementation of a new informal caregiver strategy: "When we first started doing this work, The David and Lucile Packard Foundation didn't know much about informal caregivers, so we spent time learning what others had been doing and also engaged in our own research. We developed a body of work that we found really helpful, and knowing that there wasn't that much out there in the field, we decided to share it. We posted it on our website, and that is one of the pieces that our communications folks keep telling us that people click on. We see it when we're out in the field, too. People say, 'That was a really good report that helped inform our thinking.' We see the value of sharing what we're learning, knowing that it's not everything, but it's a great starting point for folks."

By gathering and disseminating knowledge, philanthropy is able to broaden and level how different people understand complex social issues,

spark new dialogue and ideas across organizations, and promote greater collaboration and alignment among stakeholders.

**Informs policy and influences public opinion.** Foundations share knowledge that can shift public opinion and shape policymaker sentiment. Shared knowledge can also help advocates and policymakers make better decisions about how to support strong and healthy communities. Melanie Moore of the KDK-Harman Foundation notes, "Policy is a huge leverage point for philanthropic dollars because we can't do our work alone. Educating legislators is important; if they make cuts, philanthropy cannot fill that gap, but public-private partnerships can help make change. Everyone in our state benefits from that kind of work because public policy affects everyone." Citing a specific example, she relates: "Our foundation started a group called the Texas Education Grantmakers Advocacy Consortium under my predecessor. The initiative started when the legislature cut $13 billion out of the education budget in 2011. The foundations banded together in what might be considered a radical idea of putting actual research into the conversation at the legislature. They commissioned a research group to ask, 'What do these cuts mean for schools?' For a year they studied that and presented a report, then picked advocacy partners to take that story into the legislature. As a result, a good bit of the money was restored. Advocacy is what we do—having foundation trustees and staff go into the capital and meet with legislators. We're not people with their hands out, like so many are, but we say, 'We have this knowledge we can share with you. Use it as a resource.'"

***"Foundations have access to put ourselves in places and spaces to learn, and I believe that privilege obligates us to share the outcomes of that learning."***

Rev. Starsky Wilson, Deaconess Foundation

**Elevates community expertise.** Foundations frequently gather information and perspectives from community members about their needs, interests, and aspirations. They also gather information from nonprofit staff to better understand how programs and policies are working on the ground. Foundations have the opportunity to position community members and practitioners as experts, ensuring that their voices and perspectives frame broader conversation about strategy and resource investment. The New York State Health Foundation, for instance, relies on the ideas of community members to identify investments that promote healthy communities. As Cozine tells it, "Our healthy communities work is trying to improve access to healthy, affordable foods and safe places for physical activity. We've been working with a group called In Our Backyards that goes out and finds local leaders or emerging leaders whose projects they can help shape. Then the foundation provides matching funds for what they raise through a crowdfunding online platform."

Including community expertise is particularly important when working in the context of a philanthropic culture that often values the opinions of scholars, corporate leaders, and civil authorities over grantees and community leaders. As Hanh Cao Yu of The California Endowment observes, "We move in a world where if you have a Ph.D. behind your name, you have instant credibility. From an equity standpoint, we have to really think about whose perspectives are missing. Certain people have more power than others to weigh in."

## WITH POWER COMES RESPONSIBILITY

Finally, several leaders asserted that foundations have an ethical obligation to share their knowledge with others. Rev. Starsky Wilson of the Deaconess Foundation contends that this obligation stems from the unique and privileged position that philanthropy holds in society. He notes, "Foundations have a remarkable privilege to spend

time and resources on learning. We engage in an environment and an ecosystem wherein urgencies abound. Emergencies are visited into the lives and professional calendars of our grant partners more than they are for us, and they have fewer resources to react to those realities. We have access to put ourselves in places and spaces to learn, and I believe that privilege obligates us to share the outcomes of that learning." Beyond privilege, foundations also hold significant power. Reid of The Kresge Foundation believes that that power comes with a responsibility to consider how to use it for the broadest good: "Foundations have to give knowledge away. The financial gift is important; grant dollars are precious. But we have to give away more than money. Our position and power is a gift and we have to find every way possible to give."

## WHY NOT?

While there are multiple reasons for foundations to share their knowledge, many do not. Although some worry about the time and resources needed or the potential risk to grantees, using such concerns as excuses to avoid sharing can represent a failure to see the big picture. As Larry Kramer of the William and Flora Hewlett Foundation observes, "Our purpose for existing is to help make the world a better place. One way we do that is by trying things, learning, and then sharing what we have learned. That seems obvious. What's not obvious is the opposite: reasons for not sharing. The question shouldn't be, 'Why share?' It should be, 'Why not share?'"

Harvey Fineberg of the Gordon and Betty Moore Foundation shares that sentiment. "From my vantage point, the real question would be, 'Why would you not share your knowledge?'" he comments. "The whole idea of philanthropy is to apply resources to make a positive difference in the world. Sharing knowledge is part and parcel of the philanthropic impulse."

***"The whole idea of philanthropy is to apply resources to make a positive difference in the world. Sharing knowledge is part and parcel of the philanthropic impulse."***

Harvey Fineberg, Gordon and Betty Moore Foundation

## DISCUSSION QUESTIONS

- Which reasons for sharing knowledge are compelling to you?
- How would (or does) knowledge sharing benefit you and your colleagues?
- How does the idea of sharing knowledge support your mission or principles?
- How has knowledge that was shared with you, or that your foundation shared with other organizations, led to new connections and relationships?
- What are some ways that your foundation shares learnings internally? And what are some of the concerns in sharing those learnings more broadly?

# Five Common Concerns and How to Move Past Them

It's clear: Sharing knowledge is a noble goal. When foundations share knowledge, it can benefit their peers, their grantees, and the broader field. It can prompt substantive change in policies or practices. It can also strengthen the internal effectiveness of the sharing organization itself.

Yet while some grantmakers are increasingly sharing knowledge, most have not fully evolved to intentionally create a culture of learning and knowledge sharing.

So, what is holding foundations back? Grantmakers commonly cite a number of reasons for not fully embracing a practice of sharing knowledge. And although the concerns are legitimate, solutions are within reach. The biggest concerns tend to be:

- We are too busy
- We don't want to put grantees at risk
- We don't want our failures to define us
- Our knowledge may not be useful or timely
- There's too much information out there already

## CONCERN #1: WE ARE TOO BUSY

The process of sharing knowledge, including internal knowledge management and development of outward-facing communications, can be time-intensive and staff time is at a premium. As Cindy Rizzo of Arcus Foundation notes, in a context of busy professionals, knowledge sharing easily gets pushed aside. "It's no one's emergency," she says. "It's no one's high priority when there are other things that might jump ahead of it." Here are a few remedies to help reduce the time needed to share knowledge:

**Rethink priorities.** A recognition that knowledge sharing can strengthen a foundation's work transforms it from an added burden into an essential process. Indeed, sharing knowledge need not be seen as competing with grantmaking, but enhancing it. "Knowledge sharing has typically across the industry been seen as an annex activity," observes Mary Tangelder of MasterCard Foundation. "What gets in the way is if it's not prioritized." The Bush Foundation is one that articulates to staff the importance of knowledge sharing. "We have five operating values we use to guide our work and help us make decisions," explains Allison Barmann. "A number of those encourage us to share knowledge. For instance, one of the values is to work beyond ourselves. That's about seeking opportunities to collaborate, to expand our impact, and to help others. We don't hold our insights here, but make sure others benefit from them." When foundations understand and promote knowledge development as integral to their work, they expect staff to spend time on it.

**Use technology to make it easy.** In this digital age, it is easier and cheaper than ever to share knowledge. "People might not know how easy it is, although that may be changing because now you're getting people into leadership positions who are digital natives," reasons Melanie Moore of the KDK-Harman Foundation in Austin, who is its

only full-time employee. Not only can reports be easily posted on a website, but automated sharing is possible, for example through grantee reporting processes.

### COMMON CONCERNS AND REMEDIES

**Click here** to listen to funders discuss some commonly cited concerns, as well as remedies, to funders embracing a practice of sharing knowledge.

**Streamline preparation.** Not all resources require time-intensive design and crafting for public consumption. The many products that foundations create include some that are in a condition to be shared broadly (for example on a website) or with a targeted audience (such as through an email to community organizations whose work could benefit from reported findings). In the words of the William and Flora Hewlett Foundation's Larry Kramer, "There are some things we have to work really hard to frame properly, but not everything. We're putting out lots of communications just in the form it is and not worrying about it." Barmann of the Bush Foundation concurs. "We can have such high standards: if it's not perfectly written and scientifically sound and proven, then it's not worth sharing," she sighs. Instead, she advises, "We can keep it simple by just sharing what we've learned from a process, and people can take that and use it as they might."

**Spread the responsibility.** Some foundations designate staff members or a communications department to handle knowledge sharing, but that is only one approach. In fact, consultant Jara Dean-Coffey of the Luminare Group counters that the more "knowledge sharing becomes a core competency for everybody and isn't relegated to a particular division, the better." That way, staff benefit directly from their own learning and share it organically through meetings and other interactions. Partnering with colleagues or stakeholders to generate insights and share knowledge is another way to bring extra hands and minds to the effort.

## CONCERN #2: WE DON'T WANT TO PUT GRANTEES AT RISK

When considering sharing knowledge gained from evaluating grantees, foundations worry about the effects of publicly revealing a grantee's weakness, implying a comparison of grantees, or seeming to cast blame on a grantee for a project that did not work well. In fields such as human rights and violence against women, in which community-based work relies on discretion to keep its constituents safe, sharing knowledge that identifies grantees may put people at risk of physical harm. But there are steps funders can take to do no harm.

**Be sensitive.** Risk to grantees "is a legitimate concern," agrees Kramer, "but it shouldn't be a barrier all that often" except when sharing knowledge that could place people in danger. Rizzo reports that the Arcus Foundation "looks very closely at any information evaluative in nature about specific grantee organizations before we put it on our website. We don't want any of our concerns about individual grantees being publicly disseminated, although we're very eager to publicly share their stories of impact. It's the 'do no harm' idea." Kramer advises making a quick determination of the reports or sections of reports that may be inappropriate to share widely, and then proceeding with sharing the rest. In other words, if a particular report seems risky to publish and problematic to trim, then focus on sharing other products instead. Another approach some

### ACTION STEP

Rather than build out a platform or web page to share lessons learned, keep it simple by using open repositories, like IssueLab, to share your knowledge. Learn more about open knowledge practices **here**.

are finding effective is to include resources for both an internal product and a public-facing one when commissioning an external evaluation. But the reality is that this is the exception to the rule, and the vast majority of knowledge about foundation grants does not put grantees in danger, so don't let the exception create the rule.

**Contextualize findings.** Providing details that help readers understand expectations for a project and factors that influenced outcomes allows them to interpret the findings fairly. Says Yu, "We are careful to talk about the work of each community, to understand the history, the context, and the conditions in which they work." Presenting findings clearly within the context of a foundation's work also shapes readers' interpretations.

**Include positive support.** Acknowledgement of problems revealed by evaluation can be balanced with communication of positive messages.

## LEARNING TO VET COMMUNICATIONS WITH STAKEHOLDERS

Allison Barmann of the Bush Foundation described an experience that taught her team to make sure grantees and other stakeholders had a chance to provide input on communications about their work. Not only did foundation staff find that a vetting process was useful for preventing negative reactions, it also increased the learning. In her words:

*We put out a learning paper on work we've been doing with our teacher preparation partners. We had gone through the process of learning and drawing insights with them, but we hadn't actually previewed the paper with all of them before disseminating it. That was an awkward mistake because they felt blindsided by seeing the learning paper only after it was publicly released. We learned from that. We now try to make sure we're taking the time to show a product to all those involved before it goes public, giving them the chance to collectively reflect on it. That's an important step and can also enhance the learning.*

Foundations can express support for grantees, clarify that challenges are expected along the bumpy road to social change, and highlight the emergence of learning and adjustments resulting from a failure. Casting potentially sensitive findings as natural opportunities for learning can be reassuring for grantees and demonstrate a foundation's fairness and culture of openness to all readers.

***"Be able to reinforce consistently that we all make mistakes and it's important that we learn from them."***

Maureen Cozine, New York State Health Foundation

**Build trust with grantees.** Another way to manage a perceived risk to grantees is "by having strong relationships and transparency throughout so that you can talk with your grantees or with your partners about things that aren't going well. And it doesn't leave them feeling, 'Oh my God, I'm going to lose my grant'," suggests Barmann. Making sure to vet knowledge documents with key stakeholders before making them public further demonstrates respect and avoids surprises.

## CONCERN #3: WE DON'T WANT OUR FAILURES TO DEFINE US

Foundations are encouraged to share their failures to inform the field and help others avoid pitfalls. It's a compelling idea. But understandably, some foundations—and individual staff—hold concerns about what many acknowledge is a reputational risk, for example being publicly critiqued about the design of a funding initiative or the methods used to conduct a study. "It's hard," concedes Cindy Rizzo of Arcus Foundation. "These are people's professional lives and to say 'I created this initiative and it was really done poorly' is a hard thing to do." One way to soften potential detractors, she says, "is to be transparent and say 'These are the methods we used and if people have comments on how to improve those methods we're certainly open to that the next time we do something.'" Here are other ways funders can mitigate the risk of sharing failures:

**View vulnerability as a strength.** Foundation leaders can model and emphasize a culture of learning by seeing mistakes as opportunities to improve and grow. By acknowledging that no one expects perfection and by defining excellence in terms of reflection, learning, and improvement, a foundation's admission of failures—and resulting lessons—is completely in line with its philosophy. Indeed, being open and candid is likely to strengthen, not detract from, a foundation's reputation. Examining mistakes comes across as more honest and relatable than exclusively presenting successes. From the standpoint of individual staff, creating an organizational culture of learning can pay off in terms of creating a safe environment to share mistakes. As Maureen Cozine of the New York State Health Foundation puts it, "Program staff only want to share what's good. That's natural. Being able to reinforce consistently that we all make mistakes and it's important that we learn from them is really important. That happens from the top."

**Reframe your approach.** Beyond a reassurance of learning from failure, foundations can adopt what Kim Ammann Howard at The James Irvine Foundation refers to as "an experimentation mindset." If the point of a program has been to experiment or take risks, it becomes less personal to ask staff to reflect on what was hard. The inquiry is more clearly about intentional learning rather than finding fault. Howard notes, "In philanthropy, we too often say, 'Share your biggest failure. Your failure of the year.' It makes it sound like it has to be this big thing. I think we need to be experimenting and adjusting all the time. That should be an expectation of our work."

### ACTION STEP

Foster an experimentation mindset at your foundation by regularly encouraging open dialogue about efforts that are not going well, focusing on what is being learned rather than where the blame lies.

**Find safety in numbers.** The status quo of hiding failures and pain points under the rug won't change if some institutions don't take the lead. The more foundations do this as a standard part of their knowledge sharing process, the more it becomes normative rather than noteworthy. Some funders have gotten outside of their comfort zones by using in-person meetings with peers as a forum for releasing knowledge pertaining to struggles and failures. Howard at The James Irvine Foundation points out that with "cross-foundation sharing, really good conversations happen, but it just benefits those in the room." She continues, "How do we share it more broadly to benefit others outside of foundations? Foundations need to do more role modeling." By sharing the knowledge resulting from more intimate discussions on a large scale, foundations can take that critical next step that leads to more widespread learning and influence.

## CONCERN #4: OUR KNOWLEDGE MAY NOT BE USEFUL OR TIMELY

Foundations are distinct entities: each defines and addresses problems slightly differently and operates through internally grown processes. So grantmakers sometimes wonder if their knowledge is relevant to anyone else. At other times, the ideal moment to share knowledge seems to vanish before anyone has a chance to prepare it for broader consumption. Insights gleaned after a program has ended, for example, feel immediately outdated because the chance to improve that particular program has passed. Is any of it worth sharing? Yes, and here is why.

**Recognize that knowledge has a long shelf life.** Foundations become knowledgeable about a broad range of topics, for instance regarding their operational mechanics, their grantmaking approach, organizations and projects they support, and the communities or issues they seek to influence. The knowledge worth sharing lies at the intersection of the foundation's insights and opportunities for others—locally or broadly—to apply those insights. Furthermore, because social change is gradual and foundations overlap in areas of interest, even findings that one foundation feels

are outdated may be helpful to another. Kramer summarizes potential applications: "People can learn from you what didn't work and avoid making similar mistakes. People can learn from you what did work and replicate it. People can learn from you what worked partly and build on that and do still better."

**Build skills.** To a large extent, sharing knowledge is a learned skill that can become a habit with practice. To help staff become comfortable with a knowledge sharing practice, Daniela Pineda of First 5 LA offers a solution: start by sharing knowledge among colleagues within the organization. "I have an internal blog that we started here," she explains. "I make it my business to read the blog, to comment on the blog, and to acknowledge staff contributions. I'm having my staff build that muscle and model it for the rest of the organization." The first-hand experience of reflecting on and sharing a lesson learned with colleagues, as well as learning from blog posts that peers prepare, develops awareness and skills that transfer to external knowledge exchange. Moreover, once knowledge is developed for internal sharing, little stands in the way of sharing it publicly.

## A BOARD EXPECTS FAILURE AND LEARNING

The James Irvine Foundation's board supports risk taking to maximize the potential impact of grantmaking. With such risks come the expectation of wrong turns and course adjustments, which, as they see it, is an integral part of the job. As Kim Ammann Howard describes it:

*Board members have expressed that if everything goes as planned, then we're probably not risking enough. If we're not risking enough, we're probably being too careful and safe and, as a result, not going to have as great an impact as we could. Our board says they want to hear about what didn't go as expected or planned and how we are adjusting based on what we learned.*

**ACTION STEP**

Leverage knowledge shared internally. Identify at least one piece of internal knowledge that might help others outside the foundation and commit to sharing it externally.

**Use partnerships to strengthen knowledge sharing.** Like many, the Deaconess Foundation of St. Louis does not view itself as a seminal expert on improving health and well-being, yet recognizes valuable expertise emerging from the work it funds in this area. According to Rev. Starsky Wilson, the foundation is therefore "intentional about not putting out knowledge related to issues by ourselves." As an example, Wilson reported, "We supported, helped to commission, and then published work around college access with a group called St. Louis Graduates, which was a network we helped to lead. When the report came out, it was a report from the network, not from us. There's a degree of community and credibility that needs to be a part of the report, and that comes from that partnership in a way that it wouldn't from the foundation alone."

## CONCERN #5: THERE'S TOO MUCH INFORMATION OUT THERE ALREADY

With the 24-hour news cycle, constant social media updates, and push notifications buzzing through our smartphones and other devices, it is natural to ask whether adding information to the mix is a good thing. Haven't all the questions been answered? Even if not, how will people connect with what we share? As Dean-Coffey says, "There are so many words coming at us all the time, it's difficult to figure out the best modality to share knowledge." Below are a few suggestions funders can follow to alleviate this problem.

**Curate.** In this information age, there are plenty of knowledge consumers. Meet their needs by curating knowledge with target audiences in mind

so that it can be easily identified and absorbed. "That whole question of making things readily useful in ways that meet the needs of those that need it most is a step beyond sharing and creating open resources," explains Vera Michalchik of the Gordon and Betty Moore Foundation. For example, if a review of a new collaborative grantmaking strategy reveals lessons for foundations, public sector partners, and nonprofit grantees, a foundation can create and disseminate summary documents tailored to each of those audiences that highlight the information relevant to them.

**Make the knowledge easily searchable.** At the William and Flora Hewlett Foundation, Kramer holds the view that users know best what they are looking for. "It makes more sense to let the people who want the knowledge decide, rather than deciding for them," he suggests. "This is why it's crucial to have materials organized in a way that is easily searchable, so it's possible for someone to find what they need without too much effort and to sort through what they find for the subset that really is helpful." One way to assist knowledge seekers is to make a conscious effort to avoid foundation jargon and use keywords and search terms where possible. By organizing, labeling, and tagging knowledge on a searchable website, people not only can find what they need, but may organically discover a useful resource to revisit in the future. Furthermore, searchable sites and repositories enable people to find and integrate multiple related information sources, taking advantage of metadata and benefiting from a broader range of perspectives.

**ACTION STEP**

Use **Schema.org** to make the knowledge on your foundation's website more discoverable by machines and knowledge seekers. Learn more **here**.

**Meet knowledge seekers where they are.** From the standpoint of those seeking knowledge, finding answers across thousands of foundation websites can be cumbersome and fragmented. Even if the knowledge is posted somewhere, it may be hard to locate. As Barmann asserts, "I don't think we're being strategic enough in making sure others are seeing it." Enter open repositories, which are searchable and browsable collections of information that are widely accessible. Kramer describes such repositories as "the best thing I can imagine to enhance transparency—a way to make it easy to help find information." Open and collective knowledge bases like IssueLab, which aggregates knowledge products across a wide range of sources, provide a solution for knowledge seekers and at the same time allow foundations to more easily reach a broader audience: a win-win.

## DISCUSSION QUESTIONS

- Do these five concerns ring true to your experience? Which of the remedies have you tried?
- To what extent do you prioritize knowledge sharing as part of your job?
- What do you see as potential benefits for you and your organization from sharing knowledge?
- What concerns, if any, are holding you back from sharing (more) knowledge?
- How can you address your concerns about sharing knowledge?
- Who could you partner with to share specific knowledge more effectively, for example by lending research credibility or by reaching a broader audience?
- Are you adding your published evaluations to free, open repositories like IssueLab? Why or why not? If not, discuss how you might experiment with your next publication.

# Putting It Together: The Mechanics

Sharing knowledge is a process that requires coordination and commitment. But foundations both large and small have successfully built knowledge sharing into their practices—and reaped the benefits.

How? An inventory of knowledge sharing into these fundamental elements takes the mystery out of the process:

- What kinds of knowledge to share
- Why share each knowledge product
- Where to share knowledge and connect with desired audiences
- When to implement the steps of knowledge sharing
- Who at the foundation will carry out the process and how

## WHAT

What kinds of knowledge can foundations share? There are many. Each foundation holds a unique vantage point that positions it to gather and make sense of information across a community or field. Foundations can also use their connections to a broader network to raise the profile of grantee-generated knowledge. Further, foundations have much to offer their peers in philanthropy regarding their philosophies and practices. When in doubt, share! Specific ideas include:

### THERE'S A LOT YOU CAN SHARE

When you think about what to share, you might also think about who would be interested in that specific information.

| WHAT TO SHARE | PRIMARY AUDIENCE |
|---|---|
| **Rationale & Guiding Principles**<br>• Rationale for philanthropic activities and grantmaking practices | All |
| **Program & Strategy Knowledge**<br>• Program implementation strategy and reflections on successes and adjustments<br>• Experiences and lessons of partnerships and grantee relationships<br>• Insights on how to adapt, replicate, or scale proven practices<br>• Approaches to evaluation that balance cost/burden with a desire for information<br>• Recommended internal operational processes and why they work well | Other Funders & Nonprofit and Program Executives |
| **Knowledge From & About Grantees**<br>• Grantee-generated knowledge, including from scientific research and community experience<br>• Foundation perspectives across grantees or across the field that can improve practice on the ground<br>• Evaluation findings<br>• Experiences and lessons of grantee relationships | Nonprofits (Including Grantees) & Practitioners Within an Issue-Specific Field |
| **Policy & Movement-building Knowledge**<br>• Evidence-based policy recommendations or implications<br>• Findings and strategies to broaden public will on key issues | Policymakers & Advocates |

**ACTION STEP**

To learn to improve your capacity for evaluation and learning, review this **curated collection** of reports and how-to guides.

## WHY

Because knowledge benefits the greater good, foundations can adopt a streamlined practice of broadly disseminating any written work that their grantmaking produces. Some are going so far as to adopt and champion open licensing to express this commitment. By making grant-funded and foundation-generated works free for others to use, open licenses improve access to research advances and further innovations. As Heath Wickline and Kristy Tsadick of the William and Flora Hewlett Foundation state, "our decision to extend our support for open licensing to require it on works created using grant funds, underlines our belief that if grants are made to support the public good then the knowledge they generate should also be considered a public good."

Even when a foundation shares knowledge as standard practice, it can help to articulate a specific rationale when developing a knowledge product in order to inform the content of the product, the target audience, and the mode of sharing it with them. With different types of information relevant to different audiences, foundations should think strategically about crafting knowledge communications for different people and purposes. Consultant Jara Dean-Coffey of the Luminare Group, asks, "What's your intention? Is it to advance the field? Are you trying to influence others to walk a similar path? Are you trying to leverage additional dollars from other foundations?" More generally, how do you hope your readers will use the knowledge and how can you make it easy for them to do so?

**PUTTING KNOWLEDGE SHARING INTO PRACTICE**

**Click here** to learn some practical tips to become better knowledge sharers.

The answers to these questions will inform how to best transfer knowledge and which aspects to emphasize. The process applies intuitively across fields and types of funding. Consider knowledge emerging from foundation-supported scientific research. A report detailing methods and results would interest scientists and grantmakers in related fields. It could inform them of the types of inquiries being made, specific needs for further research and funding, and opportunities for professional connection or collaboration. In addition, a brief document outlining three policy implications of the findings could increase the likelihood that findings will shift public policy. Providing lawmakers and advocates with prepared policy recommendations and a summary of supporting evidence, a policy brief would equip these audiences to act. The takeaway? Share the grant-funded report, to be sure, and consider crafting targeted communications to reach specific audiences or goals.

## A PORTAL FOR CONSERVATION KNOWLEDGE

Through its Great Apes program, the Arcus Foundation began a project in 2009 to compile data from the field in one searchable place as a resource for foundation peers, researchers, activists, and others with an interest in global conservation. Cindy Rizzo describes this knowledge repository:

*Along with some partners, our conservation folks addressed a gap in the field by creating an online portal for data around the great ape species. It compiles the numbers of apes in the wild, the different threats that great apes face, and the state of habitats. It isn't just the foundation's knowledge, although there is that, but there is also knowledge from throughout the field that hadn't been collected in one place.*

The knowledge proved valuable to the field. Now beyond the involvement of Arcus, the **APES portal and database** continues as a global collaborative resource, maintained and used by a wide range of scientists, conservation activists, governments, and others.

In another example, a set of community-based meetings representing innovative collaborations between public health and law enforcement could yield multiple knowledge products. A summary, for instance, of the meetings' purpose, agreements, and next steps would be of particular interest within the community, and could be presented publicly, giving community members a chance to engage and respond. A description of the approach that led to the collaborative effort could comprise a different product, serving as a model to funders and advocates more broadly and made accessible through an open repository. Remember, though: knowledge seekers use and build upon knowledge in unforeseen ways, so open and broad sharing remains an important tenet to allow for creative and surprising uses.

## WHERE

With each knowledge product, a foundation must decide where to share it. Knowledge can be disseminated through many venues and modalities. But don't worry, it's easy to streamline sharing by letting open repositories handle dissemination. Different modalities provide

### IMPROVE USABILITY WITH OPEN LICENSING

**Open licensing** platforms like Creative Commons establish public copyrighting for published materials, giving people a legal means to download, share, or translate it. When foundations adopt an open licensing policy for all grant-funded works, they lower barriers to access, giving researchers and practitioners worldwide the opportunity to put the knowledge to use. If knowledge can spur positive change, opening access to that knowledge unlocks the potential to make a greater difference.

### ACTION STEP

Join a growing movement of foundations that are encouraging others to use and build on their work by adopting an open licensing policy at your foundation.

## PLACES TO SHARE

There are a range of places that foundations are sharing their knowledge. While a strategy that blends several sharing venues is optimal, pick and choose those that might work best for you based on their reach and required depth, interaction levels, and general cost.

| WHERE TO SHARE | REACH | DEPTH | INTERACTION | COST |
|---|---|---|---|---|
| Open repositories | Broad | Flexible | Low | Low |
| Foundation's website | Broad | Flexible | Low | Low |
| Email blast | Customizable | Flexible | Low | Low |
| Conference presentation | Limited to attendees | Limited | Medium | Medium |
| Webinar presentation | Limited to attendees | Limited | Limited | Medium |
| External blog | Broad | Limited | Limited | Low |
| External discussion | Customizable | Flexible | High | High |
| Journal or magazine article | Broad | Limited | Low | High |

## ACTION STEP

Integrate communicating about what you are learning into your program planning. Identify natural points in your process during which you will have lessons learned to share, and plan how you will share them.

different opportunities in terms of how large an audience they reach, the depth of content that can be covered, the potential for interaction with participants, and the cost (in time and dollars) required. With regard to reach, it is important not only to consider the potential number of people reached, but also whether they include the foundation's desired audience.

Sharing knowledge via digital modes has become for many what Harvey Fineberg of the Gordon and Betty Moore Foundation describes as "a mainstay." The benefits, he says, are that "electronic reaches widely, it's very democratic and even-handed, it is available at the time that the recipient would find it most convenient to access, and it is searchable so that you can rapidly determine what's most relevant and useful for you." In particular, open access repositories increase searchability and accessibility, as well as provide opportunities for all foundations to communicate knowledge broadly.

In addition to the convenience and broad reach of digital modes, foundations can reap the complementary benefits of advancing existing knowledge through in-person communication. Allison Barmann of the Bush Foundation asserts that live meetings can be both cost-effective and extremely helpful. Recalling an experience of "setting up a few meetings with another foundation to learn from their work" related to a new initiative at the Bush Foundation, Barmann remarks, "Meetings like that are not that costly and give a really high return on investment." Fineberg adds,

## TIPS FOR SUCCESSFUL KNOWLEDGE SHARING AT STAFF MEETINGS

To bring a knowledge sharing practice into staff meetings, try these ideas. For large staff meetings, small-group breakouts help to spur active engagement.

- Lead by sharing knowledge with staff regarding interests of the board, highlights and rationale of public messaging, and observations across foundation programs and functions.
- Invite staff to share knowledge at an upcoming meeting. For each meeting, designate a particular staff member (or team) to speak briefly about specific knowledge gained (e.g., a newly tested approach, a lesson learned that led to a course adjustment, or a practice that improved grantee relations). After the staff member shares, ask others to comment about similar experiences or applications to their own work.
- Designate part of the meeting as a brainstorming session to address a particular challenge that could benefit from the hive mind of the staff meeting. Examples include communicating sensitive evaluation findings, gaining partner buy-in, or advising a grantee on capacity building. Keep the problem description brief, then ask participants to draw upon their experience and professional knowledge to generate ideas and solutions.
- Encourage spontaneous knowledge sharing by asking at intervals if anyone has experience-based insights that bear on an existing agenda item. Build extra time into the agenda to allow discussions to bloom.
- Lead a year-end participatory exercise to document important learnings from the past year. This can serve as a bridge to transforming this internal learning to something that can be externally shared.

"The advantage of working in person is that you have a chance to engage with more people and perspectives in a way that is, for many of us, more satisfying, enjoyable, and memorable. Mutual learning and exchange can take place in a fluid and personal way that you have a hard time replicating in full any other way." And depending on the knowledge product and the foundation's rationale for sharing it, multiple venues and modalities may be appropriate to pursue at once and help set the stage for additional outreach.

## WHEN

At what points in the routine operations at a foundation do knowledge sharing activities take place? Critically, to integrate a sustained knowledge practice, knowledge sharing must not be an afterthought or add-on to projects, but planned from the start. As Mary Tangelder of MasterCard Foundation states, instead of being "seen as a post hoc activity, knowledge sharing has to have some real intentionality and planning." General awareness of knowledge helps to seamlessly integrate knowledge practice without requiring a substantial time commitment. For instance, in the planning stage of an evaluation, consider briefly how findings will be shared and incorporate outreach or promotion into the plan. At the outset, too, think about when during the project knowledge may start to emerge. Often, early learnings from an initiative are instructive for implementation success or development of new approaches. Integrate opportunities for reflection and sensemaking when the team will document initial insights or lessons learned. At these times, develop a specific plan to share: verbally with grantees, via e-mail to stakeholders, or through a blog post, for example.

More formal reporting by grantees, consultants, or program staff also deserves planning regarding their knowledge sharing potential. Thinking ahead about who would benefit from findings or insights can shape the format and content of an executive summary, infographic, or set of recommendations crafted with a target audience in mind. Planning for knowledge sharing in this way can avoid the need for extra staff time and effort to restructure a product for distribution.

## WHO AND HOW

Sharing knowledge for the greater good is clearly worthy, but how can foundations make it happen? Whether a foundation's knowledge practice is simple or more complex, it requires a process and staff roles to implement that process. At minimum, knowledge sharing requires a minor role of knowledge management to keep the cogs turning. Foundations ready for a deeper knowledge practice can more deliberately implement steps of knowledge identification, asset development, and dissemination. Bernadette Sangalang attests to the positive changes she has witnessed as The David and Lucile Packard Foundation has increased support of knowledge sharing over the last decade,

### LET THE MACHINES HANDLE IT

Using an open repository approach to sharing your knowledge assets simplifies this task as the machines do the sharing for you. Though open repository software may sound technical, examples like IssueLab are straightforward to use. Repositories sync with other systems on the internet so that knowledge seekers can more easily find your products where they are gathering. Learn more:

- "**Open Knowledge for the Social Sector**" framework on open repositories
- Brooks, Lisa and Fitz, Gabriela (2015) "**Grey Matter(s): Embracing the Publisher Within**," The Foundation Review: Vol. 7: Iss. 2, Article 6.

### ACTION STEP

For more on managing the vulnerability of transparency, check out our guide **Opening Up: Demystifying Funder Transparency**, especially the chapter "Is the Needle Moving? Sharing Performance Assessments."

saying, "There are processes in place now which have really helped to elevate how we're sharing our knowledge."

**Knowledge management.** Anyone can champion knowledge sharing, but to maintain a knowledge sharing practice, a knowledge management role is important. Cindy Rizzo of the Arcus Foundation notes that knowledge sharing "can suffer from its own inertia if someone's not pushing it." Often, overseeing knowledge sharing makes sense within the job description of a learning or knowledge officer, an increasingly common position at foundations. Other foundations may assign the management function to communications or grants management staff. When the knowledge sharing practice is a straightforward sharing of all written findings from the foundation's funded efforts, the management role is more simple: ensuring that reports are posted and fielding questions about potentially sensitive information. A deeper knowledge sharing practice calls for more involved knowledge management, such as supporting a planning process to develop knowledge assets and consulting with teams on strategic targeting of key audiences. Maureen Cozine of the New York State Health Foundation sums up the role as someone "who's visibly responsible for tracking and making sure that people are accountable and are thinking about how we capture and share our lessons."

**Knowledge identification.** Reflecting on lessons and new understandings is a responsibility of all staff. In many cases, such knowledge creation occurs individually through day-to-day work, but some funders recommend scheduling routine time for group sharing as an opportunity to uncover learnings that should be communicated beyond the foundation's walls. At The Kresge Foundation, for example, says Chera Reid, "Our weekly staff meeting is for everyone. We discuss just about every aspect of our foundation operations and practice. We all take turns sharing out and engaging." Similarly endorsing designated time for staff to share, Rev. Starsky Wilson of the Deaconess Foundation comments, "We structure our regular gatherings for knowledge sharing. Some of the most powerful moments we've had in our staff meetings have been things that have been

**ACTION STEP**

Use your regular staff meetings as a time to encourage staff to share what they are learning from their work. Log this to help identify lessons that might benefit from being more widely shared.

## CHECKLIST FOR FOUNDATIONS: INTERNAL ROLES AND PROCESSES

Make it real: This checklist is a tool for foundations to assess and plan internal roles and processes around knowledge sharing. Which of the items are in place at your foundation? Which could be established in the near term? If you have 1-5 of these in place, think about a way to start a conversation about the importance of knowledge sharing. If you get 6-8, think about ways to up your game. If you have 9 or more, you're a champ!

- ❑ Foundation leaders encourage and model knowledge sharing externally and internally.
- ❑ A designated staff member leads knowledge management by proactively assisting with knowledge preparation and serving as a resource.
- ❑ Staff are aware of a range of ways to share knowledge externally.
- ❑ Staff meetings routinely include opportunities to identify and share knowledge.
- ❑ Projects and work plans budget time for knowledge reflection, summarizing, and sharing.
- ❑ Requests for proposals for external evaluation include resources for knowledge sharing.
- ❑ Grantee reports are in a ready framework for sharing lessons learned, and grantees are made aware this knowledge will be shared.
- ❑ Communications are prepared with the needs of audiences in mind.
- ❑ Staff vet communications with grantees and other critical stakeholders before public release.
- ❑ Staff actively connect knowledge to target audiences in addition to using passive dissemination techniques.
- ❑ Knowledge shared internally is typically reviewed and shared with external audiences.

unscripted. When I create a space and put a topic on the table that generates discussion, that invites people to integrate what's happening in the field. Some knowledge sharing is not exactly natural but can be organic, if you will, based upon how we structure our time together." Sessions like these are helpful for uncovering knowledge that deserves to be shared publicly.

**Asset development.** Some knowledge—say, a findings brief from grantee research or a commissioned evaluation report—is ready for public consumption when a foundation receives it. In other cases, a knowledge product needs an outward-facing message to introduce it and guide a target audience to its content. And when a foundation internally develops a knowledge asset, for example a summary of early lessons from implementing a new grantmaking initiative, the product development is more involved. Knowledge management staff are the logical choice to help plan any development needed before sharing knowledge publicly. Barmann of the Bush Foundation suggests a process to keep development of a knowledge asset fairly simple and routine. "When we have an insight we think is worthy of sharing," she reports, "we go through the process of culling and developing insights internally and then crafting it into a brief document. It gives people an avenue and a mechanism to be sharing learnings." Some foundations are using blogs as a way to make this kind of succinct, on-the-go sharing routine.

**ACTION STEP**

Lead by example. Find opportunities to encourage others to open up about what they have learned by sharing your experiences on blogs, conference agendas, and webinars.

## WHAT TO THINK ABOUT

Use this to guide your next steps to knowledge sharing in ways that are both manageable and purposeful.

| | KEEP IT SIMPLE | TAKE IT UP A NOTCH |
|---|---|---|
| **WHAT** | Adopt a blanket practice of publicly sharing all written results of funded works (e.g., grantee research findings, evaluations). | In addition to sharing written products from grantmaking, document and share knowledge about the broader practice of philanthropy. |
| **WHY** | Share all written works for the greater good and don't worry about catering to different audiences. Instead of debating the merits of sharing an executive summary versus a long-form report, share both. | Design knowledge products and communications to strategically inform or influence target audiences. |
| **WHERE** | Use an open repository to contain all of the knowledge assets you create and fund. | In addition to open repositories, maximize knowledge engagement through in-person communication. |
| **WHEN** | Plan for knowledge development and sharing as a routine practice within grantmaking to streamline efforts. | Find opportunities to publicly share early findings that can inform and make transparent a thoughtful and engaged implementation process. |
| **WHO** | Assign a knowledge management role to keep a routine knowledge sharing practice moving along. | Implement processes to facilitate knowledge capture and development by foundation staff. |

## MIRROR, MIRROR ON THE WALL… WHO IS THE GREATEST KNOWLEDGE SHARING CHAMPION OF THEM ALL?

Could you be a knowledge sharing champion? See below to learn how different types of foundation staff can champion knowledge sharing.

- Foundation executives and board members are positioned to lift up knowledge sharing as a core organizational value, to cultivate a supportive internal culture, and to allocate resources to support this work.
- Program and strategy officers connect across people and organizations; their closeness to the work places them at the heart of knowledge and learning.
- Evaluation and learning officers are responsible for assessing impact and facilitating learning. As such, they are positioned to support knowledge transfer within and across foundations and beyond.
- Associate and junior staff often work closely with grantee data and information at the frontlines of knowledge development and as such, can highlight emerging lessons to their teams and suggest opportunities to share more widely.
- Communications staff have essential skills for helping foundations identify their key audiences for knowledge sharing and creatively packaging and disseminating knowledge.
- Grants managers are responsible for managing important knowledge assets and thus are positioned to identify how these can be of broad benefit to diverse stakeholders.
- Information technology teams are responsible for platforms that facilitate organizational learning and stakeholder engagement.

***"We see the value of sharing what we're learning, knowing that it's not everything, but it's a great starting point for folks."***

Bernadette Sangalang, David and Lucile Packard Foundation

Before a knowledge asset is finalized, an important step is to make sure that key stakeholders, especially those featured in the product, are aware of plans for distribution and have a chance to review the product, if appropriate. Making sure grantees and others feel they are being treated fairly and with respect helps to avoid negative consequences once the product has been made public. (See "Concern #2" on page 16 for further discussion on this point.)

**Dissemination.** When a knowledge product is ready for release, dissemination may take the form of posting to a website and ideally an open repository, and sharing a link via e-mail and social media. In addition, it may serve as an opportunity for hosting a grantee convening, a presentation at a conference, an affinity group meeting, or a webinar. It is a role of knowledge management staff to ensure that the product is posted and coordinate with any colleagues designated to share the knowledge in person. Dissemination includes sharing internally so that staff across the foundation learn from the knowledge and can participate in its distribution through social media and in-person mentions at external meetings.

## DISCUSSION QUESTIONS

- Which of the knowledge sharing elements (what, why, where, when, and who/how) seem like no-brainers, and which merit more thought?
- What kinds of knowledge do you value receiving from others?
- What have you learned recently—through your own work or from colleagues—that others might benefit from knowing?
- Which of your audiences (small or large) would benefit from learning from you?
- What other audiences might benefit from knowledge sharing other than what's listed? What might you share with them?
- Which modes of sharing knowledge have you engaged in during the past year? Which could you try over the next year?
- What roles do, or could, different staff members hold in the process of sharing knowledge?

## BRIGHT SPOTS

Foundation Center functions as a hub of information and resources to facilitate knowledge exchange. While a large number of foundations serve as models and pioneers in knowledge sharing, several shine brightly due to a visible commitment to knowledge sharing that provides insight and inspiration to those new to sharing knowledge as well as to veterans of the practice.

**William and Flora Hewlett Foundation**

The William and Flora Hewlett Foundation's bold transparency and attention to knowledge sharing has earned it a reputation as a leader in being open. Encoded in its guiding principles is a commitment to openness, transparency, and learning, and the Foundation's practices bear this out. "What's special about the Hewlett Foundation program in philanthropy," observes Harvey Fineberg of the Gordon and Betty Moore Foundation, "is that it's not only about sharing the work and knowledge gained at the foundation, but through its grantmaking it fosters sharing more widely as a program goal in addition to simply practicing it as an organization."

**#OpenForGood early adopters**

Three early adopter foundations have set a precedent by being the first to sign onto Foundation Center's #OpenForGood campaign that encourages foundations to learn from and share knowledge with their peers. As part of their commitment, these signee foundations have pledged to post all of their published evaluation reports on IssueLab, providing a valuable a resource for all.

The first to join #OpenForGood, The Rockefeller Foundation made its commitment official in September 2017. In an **announcement**, Rockefeller Foundation staff wrote, "While working in innovative spaces, the Foundation has always recognized that the full impact of its programs and investments can only be realized if it measures—and shares—what it is learning."

The Rockefeller Brothers Fund joined #OpenForGood in December 2017, **writing**, "We feel strongly that we have a responsibility to our grantees, trustees, partners, and the wider public to periodically evaluate our grantmaking, to use the findings to inform our strategy and practice, and to be transparent about what we are learning."

The third to sign onto #OpenForGood, The John D. and Catherine T. MacArthur Foundation **reports** that its "desire to be transparent is not new," as reflected by a longstanding policy to share information, a dedication to learning from evaluation, and a practice of sharing its strategy development process. The foundation "recognizes that social problems and conditions are not static and thus our response to these problems needs to be iterative and evolve with the context to be most impactful. Moreover, we aim to be transparent as we design and build strategies over time."

**New York State Health Foundation**

An example of a smaller foundation with a statewide scope, New York State Health Foundation champions an ethos of knowledge sharing. "It's such a central part of our values and our guiding principles," explains Maureen Cozine. "Every single staff member knows we have that responsibility to share what we're learning. When you come to work here, on your desk are our guiding principles. The second one is 'Be open and transparent about our activities, successes, and failures.' On the other side are our four values, which include learning. Underneath that it says, 'We capture and share our lessons learned and use them to shape our future grantmaking and to inform the fields of health care and philanthropy.' It's pretty in-your-face."

**Glasspockets participants**

Glasspockets is a Foundation Center website and initiative to champion greater philanthropic transparency, which offers a free foundation transparency self-assessment tool. "**Who Has Glass Pockets?**" is a 26-point self-assessment that includes knowledge sharing indicators, trend data, and helpful links displaying how other foundations are sharing the knowledge that they are learning. Nearly 100 foundations have so far taken and publicly shared their transparency assessment, demonstrating a commitment to working transparently. According to Glasspockets data, only about half of foundations that have used the assessment are currently using their websites to collect and share the knowledge they are learning.

# How to Share Knowledge More Successfully

All foundations, whether new to sharing or considerably experienced, have room to grow and refresh their practice to facilitate knowledge exchange. In a dynamic world where global politics can quickly shift social needs and opportunities, and where organizations must keep pace with expansions in technology, knowledge sharing itself benefits from openness to reflection and adaptation.

Grantmakers who have reflected on the transfer and use of knowledge offer ideas to deepen knowledge practice and explore new directions.

## ALIGN KNOWLEDGE DEVELOPMENT WITH OTHERS' NEEDS

Foundations that embrace knowledge sharing tend to view it as a mission-building strategy, and indeed, one purpose of sharing knowledge is to advance a foundation's goals. "We can help to enhance impact beyond our grantmaking dollars, whether it's talking about what didn't work, lessons learned, best practices, or models," comments Allison Barmann of the Bush Foundation. Taking this idea a step further, the knowledge a foundation produces can, from the start, be designed with the intent of meeting specific needs for information, engagement, and learning. In other words, using the demand for knowledge, rather than the supply, to drive what a foundation produces and shares may be more likely to lead to impact.

Considering what an audience sees as a knowledge gap is part of the strategic process of developing a knowledge product. "We should try to think harder around the knowledge that is needed in the sector rather than the knowledge that we keep generating with an assumption that it's needed and used," counsels Tom Kelly of the Hawaii Community Foundation. For example, foundations can ask grantees what knowledge would serve them in their work and respond to any overlap between the grantees' interests and what the foundation can provide. In addition, grantmakers frequently request information on how peer foundations operate and evaluate their work, calling for knowledge sharing on these topics. From the knowledge seeker's point of view, a foundation filling a need for knowledge becomes a more valuable resource. From the foundation's standpoint, strategically focusing knowledge development on meeting known demands is a smart and efficient way to spread influence.

***"The current state of knowledge sharing is benefiting tremendously from thinking about diversity of perspective and whose perspective is being shared."***

Hanh Cao Yu, The California Endowment

The Deaconess Foundation's journey to recognize knowledge sharing as an untapped opportunity for community engagement speaks to the importance of rationale when making decisions about

knowledge practice. Until a few years ago, Rev. Starsky Wilson says, foundation staff dismissed the need to invest in communications. "We would say, 'We're not trying to get credit, so we don't need the best website and we don't need to send out press releases. We just need to do our work and really it's the grantees who should have all the shine.' We thought of communications as publicity for ourselves." However, after taking time to deliberate how the foundation could improve its work, Wilson continues, "We began to say, 'No actually, it's a community engagement vehicle. It's a way we should be advocating for and on behalf of kids and this is a way for us to share some of the stuff that we know about these issues.' As you talk about means for knowledge sharing from a community standpoint, we actually do have to invest in our communications capacity to be able to do this effectively."

Wilson further points out that mindful knowledge sharing can pave a path for future partnerships. "What was most powerful was when we shared with a group of prospective grantees who were interested in working with us to build their institutional capacity," he relates. "We were not only transparent about how we thought we could work together, but we shared with them an approach that they could use even if they weren't a grantee. I found that to be valuable in building trust between us and those prospective partners."

***"If grants are made to support the public good then the knowledge they generate should also be considered a public good."***

Heath Wickline and Kristy Tsadick, William and Flora Hewlett Foundation

## CURATING REPORTS FOR PRIORITY AUDIENCES

The Hawaii Community Foundation is committed to tailoring its knowledge to key audiences to make it as useful as possible. Tom Kelly talks about the process and managing its cost by setting clear priorities:

*When we use an external evaluator, there's an evaluation report. We curate that data in shorter forms with a couple of audiences in mind. One is the grantees themselves about progress and lessons. Second is the sector, whether it be to influence public or sector policy or other nonprofits practicing in that sector. Then because we're a community foundation with living donors, the third audience is donors. We often curate information specifically for them to educate them about an issue, to help them understand the importance of their gift, and to inspire other donors. We do use the media when we want to reach broader public policy audiences, but given limited resources and time, we prioritize our Hawaii policymakers, foundations, and nonprofits as an audience.*

## MAKE KNOWLEDGE EASY TO USE

Foundations can create and disseminate knowledge, but to increase its value, it is worth considering how to make it easy for knowledge seekers to use. Barmann calls for funders to "make that final investment of really thinking about who would benefit from this, how do we make sure they get it, and how do we make sure they get the most out of it?" Strategies for making sure the knowledge is put to use include:

- Soliciting input from the target audience about the design and content of the product to be shared,
- Tailoring the product to meet the needs of the audience,
- Ensuring the product is easily accessible through commonly used communication channels and open repositories,
- Sparking curiosity and engagement by conducting an in-person "warm hand-off" of the knowledge to key audiences to the extent possible, and
- Holding meetings or workshops to facilitate use or plan action steps.

**ACTION STEP**

Assign all of your published evaluations a Digital Object Identifier code to better track its use. **Learn more** about the other components of the open knowledge framework.

Other strategies are critical for increasing and maintaining accessibility of a foundation's knowledge to the general public. To that end, use open repositories to improve access to your knowledge and tracking of its use. Open repositories facilitate broad sharing, even communicating with each other so that knowledge seekers can find what they are looking for in one place. Because of this interoperability, content on open access platforms can be found through third-party search engines more reliably than content limited to an organization's website.

In addition, ensure that your published reports include a Digital Object Identifier, or DOI, which provides a permanent record and link to a knowledge product (or other digital object). Use of DOIs is standard practice for academic and scientific journal articles—and should be in the social sector as well—to keep knowledge available indefinitely. DOIs also allow stronger tracking of the interest in and use of a product across the internet, including citations and social media metrics. Keep in mind, though, that metrics of digital use are a flawed measure of the value of a knowledge asset: knowledge reaching a small audience who acts on it could be a better outcome than reaching a broad audience that doesn't.

Especially when foundations consider knowledge use, knowledge sharing can lead to learning by both the audience and the foundation in a mutually beneficial connection. Bernadette Sangalang of The David and Lucile Packard Foundation gives an example of how a report on the foundation's early thinking on informal caregivers led to multiple useful outcomes: "People have come up to us and told us they've used it. Then we talk about it because there's so much more underneath that report. It has facilitated additional sharing of knowledge and resources and connections back to the researchers themselves. And it's not just us sharing with them, but we also learn. It's a nice way to begin building that relationship."

## INVITE DIVERSE PERSPECTIVES ON EMERGING WORK

Increasingly, foundations are realizing they can more effectively address issues related to equity and community needs by helping to cultivate community champions. Some are using their platforms to lift community voices and broaden the diversity of perspectives in social change efforts. Hanh Cao Yu of The California Endowment observes

## KNOWLEDGE ENGAGEMENT FOR CHANGE

Social change is a marathon, not a sprint, but knowledge sharing can represent an important step toward a goal. When Mary Tangelder of MasterCard Foundation thinks about how to generate long-term change, she recognizes that sparking incremental shifts requires intentionality in sharing knowledge. She makes the point that—just as with grantmaking—for knowledge to have an impact, foundations must prepare and disseminate it with care and attention to its goals. She explains:

*When we look at how change evolves, it's often through sparking conversations or seeking information from a trusted peer or colleague. It's looking at how that information has a practical application to your own scope of work, or how it can affect key decisions within institutions and larger policy frameworks. It takes a long time for those changes to happen. If we want to be able to influence with the information that we have, we have to be very intentional about how we target our information. It's not just about posting endless evaluation reports about best practices, but instead identifying key insights and targeting information to people who are in a position to be able to pick it up and make a change.*

that "the current state of knowledge sharing is benefiting tremendously from thinking about diversity of perspective and whose perspective is being shared. It's getting much more community-rooted and grounded." The Arcus Foundation exemplifies that view. According to Ericka Novotny, "Arcus invests in communications support to grantee partners. Some of that is supporting them to tell their own story. These really amazing grantee stories and the real lived experience is what moves people to find out more about our work."

A related opportunity to continue this trend lies in foundations sharing their emerging work, revealing the sometimes uncertain early thinking that takes place within the ostensible ivory tower. Instead of the typical practice of sharing only polished outcomes, foundations can open the doors to their learning process to show what is involved and to invite input. Debra Joy Pérez of the Gordon and Betty Moore Foundation points to "these unique opportunities in the development of new strategies and concepts to share early with, for example, the use of developmental evaluation. We tend to share after the fact as opposed to really sharing some of the messiness of implementation." Presenting the foundation as a workshop in this way facilitates a diverse community of learning and engages a broader range of stakeholders that may positively influence the strategies.

One example of successful knowledge exchange and development with an eye toward equity is the Bush Foundation's use of learning cohorts. Jennifer Ford Reedy describes the Foundation's approach: "To ensure we are being shaped by more people and more perspectives, we create learning cohorts to shape our strategies. In the early stages of learning about a new area, we invite others to learn with us and shape our thinking. For example,… as we develop our strategy to support individualizing education, we have an advisory group of regional experts in Native education to help us understand how our strategy can be most relevant in Native communities." Building knowledge with the inclusion of community stakeholders puts into practice a commitment to openness that promises to advance a foundation's effectiveness.

## SHARE MORE FAILURES

Although foundations possess many types of knowledge, the idea of sharing knowledge about failures and subsequent learning garners extra attention across the field. As Mary Tangelder of MasterCard Foundation describes it, "There are a lot of best practice reports. Do people learn from best practices? Not as much as they do from a failure report, which sparks curiosity and interest." But though many see clear value in learning from mistakes, foundation insiders say there is not enough sharing. Kim Ammann Howard of The James Irvine Foundation laments that there is "too much talk about the need to share failures but not enough action in actually doing so." Pérez at the Gordon and Betty Moore Foundation adds that when failures are shared, they tend to be watered down. "There's been a particular emphasis in the last four to five years on sharing lessons from failure," she says. "What I've seen is that what gets defined as failure is more and more innocuous." What kinds of failure are useful to share? Tom Kelly posits that when programs or strategies

### FINDING CLARITY FROM SHARING FAILURE

Larry Kramer knows from experience that sharing failure can yield positive benefits. He tells of a time when the William and Flora Hewlett Foundation went public with its reflections on a failed program:

*When I got here early on we ended a strategy, the Nonprofit Marketplace Initiative. I thought we should share what we learned about why it went badly, so we put a little effort in and wrote about it and put it out. It triggered a whole lot of reactions that led to a pretty good debate that allowed us to clarify what went wrong and to clarify that it was the fault of the strategy and not the grantees. The grantees had done exactly what we asked them to do and it was our theory of change that was wrong. We didn't know that until we tried it and saw it. That was a good thing.*

don't work, foundations have an obligation to keep others from going down the same path. For example, he says, "If I'm working on middle school dropout prevention here in Hawaii and we have an evaluation, we learn things, including what didn't work. Our responsibility should be to share important findings with the Department of Education on what is actionable for them." In other words, both successes and failures are useful to inform programs.

***"Making use of technology to push out succinct messages is critical to connecting with a broad audience"***

Debra Joy Pérez, Gordon and Betty Moore Foundation

When foundations share true failures and how they have learned from them, the results can be highly rewarding. Yu cites an example of reactions to a California Endowment study. "In that report," she explains, "we took a deep look at the first five years of the program, presenting five major accomplishments that we thought were pivotal within our work. At the same time, we presented six mistakes that we made. Reactions to that have been astounding in terms of how open and transparent and honest we were in the mistakes that we made, and how we're learning from that to improve. That's a continuing journey. It's okay to make mistakes; it's okay to fail."

## BE SMART ABOUT COMMUNICATION MODES

Keeping up with changes in how people gather knowledge and interact with technology is key to staying relevant and ensuring the transfer of knowledge to new audiences. Jara Dean-Coffey of the Luminare Group finds that in her experience "younger people have a different relationship to data and information and knowledge than older generations do because they've had so much more access to it and theoretically it's democratized." Tangelder of MasterCard Foundation adds the perception that foundations' typical communication practices are losing relevance as new technology practices emerge, such as the use of Medium as opposed to traditional PDF reports. "The way we are using technology to share information has fundamentally changed," she maintains. "We haven't really caught up as a sector. We're still in this world of attaching reports and bulky information, throwing it up, and hoping somebody is going to engage." To refresh that engagement, foundations must consider the populations they wish to reach and adjust accordingly.

At the same time, foundations must find a balance of communication modes that are accessible to all audiences. Many foundations support communities that have less technological capacity, or that require considerations of language, literacy level, or accessibility for people with disabilities, while

## CHECKLIST FOR FOUNDATIONS: KNOWLEDGE EXCHANGE

Make it real: Use the items below to take your knowledge exchange practices to the next level. This checklist is a tool for foundations to assess and grow their knowledge exchange. Which of the items are in place at your foundation? Which could be established in the near term? Which over the longer term?

- ❑ Knowledge development begins with an identification of external needs and how the knowledge can meet them.
- ❑ Knowledge is actively communicated to key audiences, not just passively disseminated.
- ❑ Foundation staff engage with audiences to learn from responses to the knowledge.
- ❑ Partnerships and collaboratives serve as opportunities to jointly prepare and communicate knowledge.
- ❑ Foundation staff actively seek knowledge from each other and from external sources.
- ❑ Foundation leaders and boards encourage learning from failure, including underscoring benefits to individuals as well as the whole organization.
- ❑ Foundation staff adopt an open knowledge approach to knowledge sharing.

others have audiences that include academics and think tanks that need long-form PDF documents. With a range of audience needs and interests, foundations are well advised to think broadly and communicate through multiple modalities. Yu reports that The California Endowment does just that. "We're sponsoring a lot of convenings and our learning and evaluation department regularly sponsors statewide meetings and convenings among our partners. We do webinars and blogs and our website is constantly full."

Pay attention, instructs Pérez, to the opportunities and limitations of each communication mode. For instance, "both the opportunity and the challenge in this current gestalt of social media," she asserts, "is that you have to be on point, pithy, attractive, enticing and yet not lose the science and the research." As she points out, detailed reports of empirical findings still hold value for some readers, but making use of technology to push out succinct messages is critical to connecting with a broad audience.

## DISCUSSION QUESTIONS

- Which of the ideas in this chapter are a good fit for you?
- What external needs for information are met by the knowledge you share, and what might be some gaps?
- How do you make sure your knowledge reaches those who may benefit most?
- Whose perspectives are represented in the knowledge you share? What perspectives could be included in future knowledge sharing?
- Do you agree that sharing failures is helpful?
- What kinds of professional failures have you or your organization experienced, and how did those failures inform learning and next steps?
- Who do you hope to influence, and how do they likely gather knowledge?

## ADDITIONAL RESOURCES: EXAMPLES OF WHERE FOUNDATIONS CAN SHARE KNOWLEDGE BEYOND THEIR OWN WEBSITES

- Open repositories such as IssueLab, an accessible, searchable, browsable collection of more than 23,000 case studies, evaluations, white papers, and briefs from social sector organizations around the world. Other subject-focused examples include the Education Resources Information Center, or ERIC, run by the U.S. Department of Education; the nonprofit Public Library of Science(PLOS); and the open access scientific knowledge sharing platform ResearchGate.
- Newsletters, blogs, and events hosted by grantmaker affinity groups and regional associations (e.g., Philanthropy News Digest's PhilanTopic, Grantmakers in Health Views from the Field, etc.)
- Conferences and webinars hosted by organizations that focus on philanthropy (e.g., PEAK Grantmaking, Grantmakers for Effective Organizations, etc.), evaluation (e.g., American Evaluation Association, Center for Culturally Responsive Evaluation, etc.), or specific content fields.
- Explore the resources and tools available from the Open Research Funders Group, which is dedicated to the open sharing of research outputs.
- Journals and magazines focused on philanthropy, the social sector, or a content area of interest (e.g., The Foundation Review, Stanford Social Innovation Review, etc.)

# The Long View: Creating a Culture of Learning Through Knowledge Exchange

Knowledge exchange helps foundations sharpen thinking both through the reflection required to prepare the knowledge and in receiving intelligence from others. To continue benefiting from sharing and consuming knowledge over the long term, foundations must build the practice into their culture.

When a foundation's knowledge exchange grows from reliance on a single champion to becoming part and parcel of a knowledge culture generated by staff, leadership, formal policy, and routine practices, it is bound to persist into the future. As Daniela Pineda of First 5 LA asks, "What is the organizational culture that we need to have to incentivize knowledge sharing as a way we work?"

***"Sharing information is part of doing good philanthropy."***

Larry Kramer, William and Flora Hewlett Foundation

## MAKE LEARNING AND KNOWLEDGE SHARING CORE VALUES

For learning and knowledge sharing to be sustained as part of an organization's culture, they must be understood as core values, not just trendy processes. Explicitly naming learning and knowledge sharing in a foundation's statement of values sends a strong message of their centrality and lasting importance. Foundation leaders can also raise the profile of knowledge exchange among staff by framing it as integral to the work. "It's important that it's seen as a priority and part of grantmaking rather than something that's extra," explains Kim Ammann Howard of The James Irvine Foundation. Larry Kramer of the William and Flora Hewlett Foundation agrees. "Sharing information is part of doing good philanthropy—as much as doing due diligence on a grantee before you give them a grant or working collaboratively with other partners," he stresses. "The key is to frame information sharing so that it's not seen as taking away from the time they have to do their job, but rather understood as part of the job."

## LEAD BY INTERNAL EXAMPLE

Beyond speaking favorably of sharing knowledge, foundation leaders build a knowledge culture by demonstrating the practice with staff. "A foundation can model sharing by how it treats internal information within the staff of the

**ACTION STEP**

Develop a values statement for your foundation that includes the importance of learning and sharing knowledge. Post these values to your website.

**ACTION STEP**

Take the mystery out of your board meetings. After your next board meeting, dedicate a staff meeting to sharing out what you learned from the board discussions.

foundation," remarks Harvey Fineberg of the Gordon and Betty Moore Foundation. Specifically, he continues, "How well and fully does it share information about the board in discussions and afterwards? How well does it keep everyone attuned and seek input from everyone about important questions and policies that are being considered? These practices that you have about your own internal communication also become a standard for how you would communicate with the outside world. It's important to be consistent about the idea of open sharing of knowledge. It's not only with the outside; it's also with the inside."

## EMBRACE REFLECTION

Making sure that both knowledge sharing and knowledge consumption continue to serve the needs of the foundation and its staff requires ongoing thought and planning. Allison Barmann of the Bush Foundation encourages foundation leaders and knowledge champions to schedule time to reflect on a series of big-picture questions: "What are you trying to accomplish? What have you learned? What else do you need to learn? What are we going to change because of it?" She points out that this effort toward maintenance of a knowledge culture does not require a hefty time commitment. As she notes, the Bush Foundation's agreement by leadership to take twice-annual "dedicated time to encourage that reflection has been really helpful. That's just a meeting twice a year; that's pretty easy."

In addition, foundations can incorporate internal knowledge reflection in more informal ways. Similar to including knowledge exchange as a standing item on staff meeting agendas, Barmann endorses "lunch-and-learn" sessions for program staff to share and interact with colleagues. "Those are good ways of encouraging reflection and sharing internally," she remarks. "All these little things add up to a culture of people wanting to reflect and share internally—and hopefully externally." Casual lunchtime sessions can be expanded to include a broad set of foundation staff and even board members as well, fostering exchange and reflection across boundaries that sometimes act as siloes. Even more informally, learning practices include seemingly minor behaviors that respect and enhance learning and knowledge. Ericka Novotny of the Arcus Foundation, for instance, encourages staff "to stop what you're doing when someone walks into your office and actually engage and have a conversation instead of multitasking. Multitasking is a killer of learning."

## BUILD A COMMITTED STAFF AND BOARD

Gaining staff buy-in about sharing knowledge and creating a learning culture is not simply a matter of top-down encouragement; the jobs that staff are hired to do must explicitly incorporate the practice. Rev. Starsky Wilson of Deaconess Foundation advises writing it into job descriptions.

### DEVELOPING A CULTURE OF LEARNING

At The California Endowment, executive and board leadership take explicit steps to model and encourage a learning culture. Hanh Cao Yu describes it this way:

*There's an aspect of promoting a culture of learning that goes hand in hand with knowledge sharing… In terms of transparency, it starts at the top. President and CEO Dr. Ross, even when the news is not great, says, 'We've got to share it with the board. We have to share it with staff. We have to share it with our community.' He's very committed to that and really takes the lead. We value promoting that culture of learning and sharing with each other and with our community. In addition, the questions asked from the board, in terms of how we make an impact and how we can do better, serve to create a culture of learning.*

"We actually do have to revisit job descriptions to invite people in their job to find opportunities to share," he comments. "We may need to define the constituencies with whom they are accountable to share their knowledge." Similarly, board responsibilities that include knowledge exchange help to codify board practices that lead to an expected knowledge sharing practice among trustees.

Furthermore, over time, a foundation can help ensure that staff feel a professional commitment to learning through its hiring and professional development practices. Barmann suggests emphasizing knowledge sharing in professional development opportunities, for example learning how to craft effective knowledge communications or expanding networks for richer knowledge exchange. Also, she says, "We look for that a lot in the people we hire. We want people who are really learners, who are reflective." Emphasizing a knowledge culture from the point of hiring makes a difference in staff-wide attitudes toward learning. As Barmann explains, in contrast to what she observes at the Bush Foundation, "Colleagues at other foundations talk about evaluation being such a drag. They have to talk their program people into doing it and face resistance." Hiring staff who are committed to learning saves effort in trying to gain buy-in on learning and knowledge practices.

## SPREAD KNOWLEDGE SHARING BEYOND YOUR WALLS

A belief that knowledge sharing is important in philanthropy opens the door to advocating for foundations to adopt the practice across the field. As Maureen Cozine of the New York State Health Foundation puts forward, "The leaders who are doing this type of knowledge sharing should be proud of it. They should tout it. They should be at conferences talking about it and writing about it and doing webinars. The more it gets out there, the harder it is to justify not doing it." Sharing knowledge, she adds, should be "an expectation of the field—not something nice to do, but a requirement. We need to lead by example and be really in-your-face about it more than we've been."

### CHECKLIST FOR FOUNDATIONS: BUILDING A KNOWLEDGE SHARING CULTURE

Make it real: Use the items below to cultivate a thriving knowledge sharing culture at your organization. Which of the items are in place at your foundation? Which could be established in the near term or in the longer term?

- ❑ Our foundation explicitly values knowledge sharing.
- ❑ Foundation leaders model and discuss with staff the integral role of knowledge sharing in conducting the foundation's work.
- ❑ Knowledge sharing is understood across the foundation as a key part of the job, not secondary to grantmaking.
- ❑ Knowledge sharing practices are integrated throughout our work, not reliant on a staff member to enforce them.
- ❑ We share many different types of knowledge.
- ❑ Position descriptions and performance reviews emphasize knowledge sharing.
- ❑ Our culture is one of experimentation; failure—and learning from that failure—is expected.
- ❑ We promote knowledge sharing across the philanthropic sector.

## DISCUSSION QUESTIONS

- Do these ideas line up with how you envision leadership, board members, and staff contributing to a culture of learning?
- To what extent is knowledge sharing incorporated into the way your organization works?
- How can you take a leadership role in promoting a knowledge sharing culture?
- What are your knowledge sharing and learning goals for the year?
- How are staff introduced to knowledge sharing and supported in their knowledge practice?
- Is your foundation ready to become #OpenForGood?

# Looking Ahead: Knowledge Sharing as a Norm

Knowledge sharing is poised to become the norm. Philanthropy, which is essentially a field based on the promise of good ideas, needs to learn from shared knowledge to make those ideas as effective as possible.

Foundations, through programs of all sizes and scopes, tackle complex issues like civic engagement, public health, and environmental stewardship—issues that no single organization can solve on its own. For the sake of doing the most good with these limited resources, effective knowledge exchange is a necessity for the future of philanthropy. More foundations should take steps to broaden their knowledge practice, reflecting on the needs for information they observe among grantees, partners, and peers; identifying the broader value and application of what they are learning; and embedding knowledge sharing into their routines and culture.

Momentum is already growing. "There's some healthy competition. The more people who share knowledge, the more of us will pile on, and that's a good thing," declares Maureen Cozine of the New York State Health Foundation. "It becomes the norm rather than the exception."

**KNOWLEDGE SHARING AS A NORM**

**Click here** to hear from funders who are making knowledge sharing a norm, rather than an exception.

## ENDNOTES

1. As reported by **Recode**, people across the world consumed media for over 7.5 hours per day on average in 2016.
2. Foundation Center data tells us that foundations make an average of $5.4 billion in grants each year for knowledge production activities, yet only a small fraction of foundations actively share knowledge assets that result from those grants. Accessed on March 30, 2018.

## CREDITS

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