



LEARNPHILANTHROPY

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FALLING INTO PHILANTHROPY, WANDERING INTO LEARNING

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It's well established that there's no established pathway into grantmaking, in the way that doctors have medical school or teachers a credentialing system. And once you get into a grantmaking job, while your own employer may have a set of expectations for what you know and are able to do (and may even have an efficient way of conveying them to you), the "field" doesn't seem to. Or if it does, it's got a funny way of making you search high and low for them.

As Jan Jaffe observed, some grantmakers don't even see learning as a part of the job.



During LearnPhilanthropy's original development, I conducted more than 30 interviews with experienced grantmakers about their learning pathways.

I asked:

“When you first started in philanthropy, what did you need to learn?”

The most common answer:

“When I first started my job, I didn't even know what questions to ask.”

I heard this poignant line—almost word for word—from executive directors of family foundations and program officers at medium-sized and large ones. I heard it from people who came into philanthropy as seasoned veterans from other fields. They described casting about for answers, and sometimes realizing years later that they'd somehow skipped over critical knowledge. “I spent a lot of time Googling to learn the nuts and bolts of grantmaking,” said one family foundation executive director. A program officer at a large foundation described “...asking everyone I could think of: ‘where do you get your resources? How do you do your job?’” Another interviewee reported, “I was uncomfortable in my job for about three years. And I made unbelievable mistakes during those three years.”

The people I spoke with went on to describe how, over a period of years, they ultimately patched together what they needed to feel competent and confident in their work. Some found context and background in programs that specifically give an introduction to the nuts and bolts of grantmaking, or further refining of it. Some pointed to philanthropy support organizations or resources, including GrantCraft, Exponent Philanthropy (formerly the Association of Small Foundations), Grantmakers for Effective Organizations, the Council on Foundations, and various regional associations of grantmakers and affinity groups.

Yet most also talked about the continued challenge of navigating the territory without a map. This was the second piece of consistent feedback:

There is no good system to help sort through the array of learning resources.

“It would be nice to find exactly what you're looking for without going through five thousand websites,” lamented one program officer. “I kind of suspect I'm just stumbling across the good stuff I find,” said another. “That makes me really aware of how many other good things I'm probably missing.”



LEARNING IN FOUNDATIONS

Whose job is it to think about learning in your organization? Most of the time—let’s be honest—this isn’t part of anyone’s job description, though CEOs, program directors, and others can do it well. However, some larger foundations devote part of someone’s job, all of someone’s job, or even multiple jobs to this function. These “learning officers” may be human resources, organization development, or evaluation professionals. Despite the variety of titles and tasks, they share the challenge of determining and meeting learning needs in their organizations. “No one wants to admit that they don’t know how to make grants. That’s supposed to be the easy stuff,” said one. Another described the “blank stare and panicked look,” he’d encountered from recently hired program officers in response to a question about whether they felt prepared for their grantmaking work.

LearnPhilanthropy wants to help funders establish effective internal learning processes. So during these development conversations we also explored what works within a foundation to get grantmakers up to speed, keep them learning, and make sure that learning is happening across the foundation.

Five basic elements seemed to be common across organizations.

- 1 Define what grantmakers need to know and to be able to do at your foundation.** It’s easier to know what’s needed if your organization has already defined what people *should* know and *should* be able to do for their job. Some foundations develop an actual “competency” or “success” model, but many haven’t codified the knowledge and skills needed to be a

good grantmaker. Some of this is role-specific—obviously a program officer and a grants manager need different skills and knowledge. Some may be foundation or even program-area specific.

Some of the field’s existing learning frameworks propose different takes on what is essential to the well-rounded grantmaker’s knowledge and skills:

- [GrantCraft’s Map of the Craft](#)
- [The Forum of Regional Associations’ Framework for Grantmaker Education](#)
- [Categories of learning from the Essential Skills and Strategies course](#)
- [The Grantmaking School at Grand Valley State University’s grantmaking workshops and customized training](#)

- 2 Assess learning needs.** While some of this comes out in the interview and hiring process, it’s still useful to have a dedicated process for sitting down new staff to figure out what they need to know. As individuals progress in their jobs, their needs can be revisited and reassessed during annual performance reviews or other reflection periods.

It can be more challenging to assess the learning needs of teams or of the organization as a whole. Some funders use results from organizational effectiveness assessments, such as the Center for Effective Philanthropy’s Grantee Perception Survey, to set a learning agenda for the year. Others focus an annual learning agenda on honing staff knowledge and skills in relation to specific strategic goals set by leadership.

ASSESSING YOUR OWN LEARNING NEEDS

What if you need to assess your own learning needs, either because you're the only person at your organization or the only one focused on your learning? You can do this assessment, and create a learning agenda for yourself, by drawing from the frameworks mentioned above. You might also check out:

- GrantCraft's [Roles at Work cards](#) are a playful way to consider the many hats that philanthropy professionals play and determine where you might want more support.
- Learn Philanthropy's [Real Simple Taxonomy](#) describes categories of learning that might help you decide where you want to hone in for your own professional development.
- If you're in a leadership position, the Council on Foundation's [Competencies for CEOs of Private Foundations](#) might be a good guide to the many skills and competencies needed in your job.

3 Provide orientation to nuts and bolts as well as systems and culture. Some learning officers we talked to described detailed orientations that include a series of modules walking a new staff person through everything from the locations of the bathrooms to the basics of operations to the foundation-specific philosophy of grantmaking. Generally, orientation falls into several categories:

- **Nuts and bolts on-boarding** – This is the basic “here’s where the bathrooms are... here’s where we keep our files...” type of orientation that most new hires receive early in their tenure. For some foundations, this is a distinct process, with presentations and handbooks. For others, orientation happens on the job.
- **Learning about grantmaking** – This involves learning to improve the work itself, from the basics of how to conduct a site visit to community leadership, effective grants management, understanding the implications of evaluation results, and other knowledge specifically related to the immediate work of the foundation. Some funders send staff to workshops or courses; others expect staff to learn on the job by shadowing more experienced peers or jumping right in.
- **Acculturating** – This is the explicit or implicit introduction to values, norms, and foundation-specific practices. It is often seen as part of orientation, but extends much further into any foundation-specific professional development that is offered.

4 **Prioritize ongoing instruction, mentoring, and coaching.**

Ongoing learning can be formal and informal, and can happen in-person or online. Some professional skills-building includes skills not specific to philanthropy, like public speaking or using Excel. Program officers often also require continual learning in a topic-specific area, such as environment, education, or immigrants' rights. While foundations often hire program officers who are already experts in their field and who bring topic-specific knowledge to their new role, their ongoing learning requires extensive reading to stay on top of trends and field-specific information. They often benefit from participation in affinity groups such as [Grantmakers for Education](#) or [Grantmakers Concerned with Immigrants and Refugees](#).

Experienced staff are an excellent teaching resource, and many of the foundations I've talked with had formal ways to connect experienced grantmakers with newer hires, including:

- Mini-courses or modules taught by experienced grantmakers
- Formal mentoring programs
- Informal sharing and mentoring expectations

5 **Bake learning, reflection, and analysis into daily, weekly, and monthly work.**

A culture of continual learning requires that learning be built into the day-to-day and week-to-week expectations of the organization. Without an ongoing expectation for this type of learning and reflection, learning is all too likely to slip to the bottom of the to-do list of busy philanthropy professionals. Staff and departmental meetings can include formal processes to review data, analyze tricky situations, and get in-the-moment feedback and discussion about a grantmaking program or process. Workplans can incorporate learning objectives and activities in addition to work goals. And senior leadership can set the right tone by modeling and welcoming inquiry and learning in their own work and interactions.





RESOURCES FOR FURTHER LEARNING

Want to read more about how grantmakers can build a learning culture and agenda? Want to identify areas where you might want to pursue more skills and knowledge? Check out these resources, available through LearnPhilanthropy:

- Bridgespan: [Getting Better Over Time](#)
- Bridgespan: [What Are the Five Most Common Traps I Should Avoid in My Philanthropy?](#)
- Council on Foundations: [The Complete Guide to Grantmaking Basics: A Field Guide for Funders](#)
- Grantcraft: [Reflection on Practice Video: Starting as a New Grantmaker](#)
- Grants Managers Network's Project Streamline: [Grantmaker Assessment Tool](#)

QUESTIONS TO GUIDE LEARNING:

Newcomers to grantmaking who are figuring out their learning needs should ask:

1. What are the key components of your job, both issue- and role-specific? What skills does your role require? Map your job description and daily tasks to these skills. Clearly understanding your role as a grantmaker is a crucial first step to figuring out where you might need to grow and how to focus your learning path.
2. How does your organization support your learning and the learning of those who are more experienced? Do you see areas for improvement? Do others? How other grantmakers in your organization have learned and evolved their skills can teach you a lot.
3. Who can you learn from in your organization, or elsewhere in the field? Can you access their knowledge and expertise regularly? Mentors are a great asset to a new grantmaker.

Philanthropic organizations building a culture of learning should ask:

1. Why does it matter that learning is a priority in philanthropic organizations? How will a culture of learning help the organization achieve its mission? Knowing why learning is important for achieving your core purpose will help build support for what you need to do to improve learning.
2. Who should decide what a foundation professional should know—their specific grantmaking organization or the “field” of philanthropy?
3. What are the key competencies for grantmakers in your organization? How is building or improving those competencies fostered, evaluated, and rewarded internally?



ABOUT THE AUTHOR

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Jessica Bearman works with foundations and other mission-based organizations, focusing on organization development, facilitation, planning, and project R&D to help them become more intentional, effective, and responsive to the communities that they serve.

Jessica's current and recent clients include the Talent Philanthropy Project, Exponent Philanthropy, Grantmakers for Effective Organizations, [Project Streamline](#), [LearnPhilanthropy](#) and individual foundations, including the Baptist Community Ministries, the Annie E. Casey Foundation, the Oak Foundation, and the Hogg Foundation for Mental Health. As a consultant and in her prior role as deputy director of New Ventures in Philanthropy, Jessica has written and spoken widely about new and established philanthropy. She is the author of several studies of giving circles and collective giving. Her most recent publication: *Practices That Matter*, investigates the impact of grantmakers' application and reporting practices. She [blogs](#) regularly on the topic of funder practices and values.

Prior to her work in philanthropy, Jessica spent nine years at the Chesapeake Bay Foundation, an environmental nonprofit based in Maryland. She has an undergraduate degree from Brown University and a Masters in Organization Development from American University/National Training Laboratory. Jessica loves living in the wilds of Idaho with her husband and two sons.

