

A Tool for Systems Change that Supports Learning in Foundations

Our ability to learn is strongly affected by the systems in which we work. We have to think about the personal, social, and structural dynamics that get in the way of (or reinforce) our effective collection and use of information.

Foundations are systems.

They have their own cultures and related assumptions, norms, standards, and practices.

In his book *Decolonizing Wealth*, author Edgar Villanueva makes the point that many foundations started with and have sustained white-dominant cultures. For example, they can discourage debate and alternative points of view, and reinforce characteristics like perfectionism, defensiveness, and fear of open conflict. In addition, foundation norms tend to keep staff busy, allowing little time to reflect.

They especially get in the way of equitable learning, which requires being accountable to the perspectives of grantees and the groups and communities with whom they work.

All of these characteristics get in the way of learning.

We encourage foundations to take stock of their learning needs with a dispassionate (evaluative) look at themselves as systems and how people work within them.

We invite them to examine their cultures and how those cultures impact learning, intentionally or unintentionally. We also encourage foundations to look carefully at their existing mental models and paradigms about how information gets shared and received, and to unlearn what is no longer useful – or worse, harmful.

To help us think about what to look for and how to change it in ways that support learning, we've used the work of systems theorist Donella Meadows.

Her work resonates because it recognizes both systemic constraints and possible leverage points for addressing them.

Meadows identifies a series of leverage points for changing a system, ordered from least to most powerful. We adapted her work to show how each lever can reinforce learning in an organization or system.

Meadows says that we often are disappointed in the results of systems change efforts because we tend to tweak the least powerful levers in the system — such as skill building or the flow of resources or information. We find this can be true with learning in philanthropy, where many foundations support learning with tools and training alone.

How to Change a System

A list of leverage points, in ascending order from weakest (1) to strongest (12). Higher leverage points produce stronger, broader, more durable change. At what level are you working? Could you intervene higher?

1. Skills: Use training, modeling or experiential learning to support learning habits.

2. Resources: Provide funding or expertise (consultants) to support people's learning.

3. Buffers: Provide unstructured time or funds to create space for learning.

4. Infrastructure: Build/modify products, processes, practices to lower the cost of learning.

5. Feedback loops: Provide feedback on the quality of learning habits in practice.

6. Inclusion: Help less powerful actors (grantees, communities) to practice in learning.

7. Community: Convene or support a community of practice (e.g., learning champions).

8. Accountability: Collect data on who is practicing quality learning and spread it.

9. Level playing field: Redistribute privileged access to information.

10. Rules: Adopt policies that support or make people accountable for learning.

11. Purpose: Leaders speak and act as if quality learning was already a fact.

12. Paradigm: Leaders know the value of learning, prioritize it, back it.

INDIVIDUAL
CAPACITY

DESIGN

INFO
FLOWS

STRUCTURE

LEADERSHIP

ADAPTED FROM SYSTEMS THEORIST DONELLA MEADOWS

High-quality and more equitable learning cannot be achieved through lower-level systemic interventions alone.

More powerfully impacting a system to support learning requires pulling multiple levers at once or tapping into higher-impact levers.

Levers should include information flows (who is included in learning) and structures (who has access to information), as well as leadership levers that create incentives and rewards for people to learn and adapt.

We developed concrete examples of how to push each lever in the systems hierarchy so that learning is supported.

1. SKILLS

- Learning and Evaluation (L&E) staff **train program teams on theory of change** development and the [articulation of assumptions](#).
- L&E staff **model how to ask [powerful questions](#)**.

2. RESOURCES

- Foundation funds **capacity building for learning** activities such as [emergent learning](#) or [systems mapping](#).
- Foundation funds **facilitators for learning** activities.

3. BUFFERS

- Foundation schedules **one day per month for dedicated learning** activities.
- Foundation maintains a set of **learning facilitators on retainer**.

4. INFRASTRUCTURE

- Foundation develops **guidelines for gathering grantee feedback**.
- Foundation requires the development of **learning agendas in strategy plans**.
- L&E staff are **embedded in program teams** and lead learning processes.

5. FEEDBACK LOOPS

- Leaders give **immediate positive feedback to staff and grantees** who demonstrate they are grappling with issues or comfortable talking about what doesn't work.
- Learning activities focus on **questions staff need to answer now** so they experience it as immediately helpful.
- Leaders are **alerted to ways they inadvertently disincentivize** admissions of uncertainty.

6. INCLUSION

- Program staff seek **feedback from grantees** on the [extent to which the foundation is living into its values](#).
- Program staff include **diverse stakeholders in interpreting** data and exploring the implications.
- Senior staff **invite junior staff to engage in learning activities**.

7. COMMUNITY

- L&E staff **convene communities of practice around crosscutting issues**.
- L&E staff identify **learning champions across program areas** who model high quality learning practices and identify crosscutting learning opportunities.

8. ACCOUNTABILITY

- Foundations **reward program teams** for developing and testing hypotheses, and sharing the results.
- Program performance measures **reinforce the link between past learning and future actions**.

9. LEVEL PLAYING FIELD

- Foundation shares **evaluation results and other products** with grantees and the public that make its thinking and its learning visible.

10. RULES

- Foundations require **inclusion of learning about what has worked elsewhere in strategy** development and review processes, and the role of risk (both taking and mitigating).
- L&E staff **require evaluation products to include strategic lessons and implications** for the work.

11. PURPOSE

- **CEO/President routinely refers to evaluation findings** or feedback processes in presentations.
- Program staff **incorporate hypotheses and assumptions into all strategy** development discussions.
- Foundation staff **make “What? So What? And Now What?” a mantra.**

12. PARADIGM

- **Boards reorient meetings around the “so what/now what”** conversation rather than “proof of impact.”
- Leaders **re-imagine/reward the program staff role** as explorer, experimenter, and change navigator.
- Leaders **consider how feedback processes and evaluations (generated by the foundation or the evidence base at-large) affect strategy** design and approval.
- CEO/President or board **asks evaluators to reflect on the impact of their exit** on the field or on the problem.

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