

“ The knowledge management system is much more than a technology initiative; it is an initiative to shape the culture of a field. ”

Seeking, managing and disseminating knowledge in
education philanthropy:
Information audit of grantmakers

Executive Summary

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Introduction and Key Findings

Grantmakers for Education (GFE) sought to conduct an information audit for the purpose of developing a better understanding of its members' information needs prior to the design and implementation of a knowledge management system. Specifically, GFE's objectives for the study were to:

- Identify what information people most desired in their work;
- Refine the various outcomes and objectives for such a system;
- Assess the potential need for a system and the extent to which GFE's members would use it;
- Determine how these needs might differ by segments; and
- Identify existing or emerging communities of practice that could be used to build support for and use of the system.

This required an examination of the existing patterns of information flow throughout GFE's member communities as well as gaining a better understanding of the specific cultural issues that foundations face as they seek to collect, analyze, and disseminate information. The overall aim of this report is to assist GFE in developing a fuller understanding of its members' information needs and their patterns of information use as it considers options for establishing a knowledge management system for education grantmakers.

The findings in this report are based on two focus groups and 31 individual interviews with grantmakers from small and large foundations (both in terms of number of employees and size of endowments), including national, regional, community, family, corporate and operating foundations, as well as individual donors. The first focus group, held in San Francisco, California, on August 11, 2003, helped to refine the questions used to conduct the interviews. The second focus group, held in New York City on September 5, 2003, helped to explore some of the preliminary findings from the interviews. All interviews were conducted in August and September, 2003, and each interview lasted about an hour.¹ Participants in the interviews and focus groups included foundation presidents, vice presidents, executive directors, program officers and other foundation leaders working in the field of education. Participants included individuals new to the field of grantmaking, new to the field of education grantmaking, as well as those with a great deal of expertise in both grantmaking and the field of education.

Although foundations differed in the types of populations and programs that they served, participants shared several common patterns of information gathering and use. They reported that they were most active in gathering information when they needed (1)

¹ A few quotations in this report have been edited slightly to improve clarity, but not to revise content.

to inform their boards of new developments in the field, (2) to develop projects or programs in new content areas that the foundation had not yet funded, or (3) to justify new directions or areas that they felt the foundation should consider funding.

The most commonly-reported first step in seeking new information on a particular topic began with Web-based searches. Google was most frequently cited as their method of Web-based searching, and all but a few of the participants regularly queried Google as an initial step in the search process. The second most common method of gathering information was via the phone. Face-to-face meetings, which included formal conferences and workshops as well as informal networking opportunities, were the third most cited way of gathering new information.

When asked about their unmet needs for information, participants most frequently cited the need for better synthesis and analysis of the information that was already out there, as opposed to the desire to acquire new information. This was motivated by the overarching sentiment that information overload was a very real impediment to meeting their information needs. Additionally, participants reported that they wanted to learn more from analyses of failures in the field, to avoid reinventing the wheel. As one participant explained, “We need to learn from mistakes. We want reports and accounts of failure that could serve as lessons for learning and improvement.”

Second, participants desired just-in-time information—meaning that they wanted access to specific information when they needed it, as opposed to having more general information “pushed” to them on a regular basis. They wanted to be able to search for information about a specific education issue through an interface that provided a “slice” into many different dimensions of the issue. Such an interface might include information on who else funded programs that address the issue, literature and other resources on the issue, multiple sides or perspectives on the issue, federal and state legislation on the issue, information about issue experts, and information about conferences related to the particular issue.

Third, participants are seeking information on more effective ways to measure the impact of their investments on educational outcomes, particularly a more effective use of evaluations to improve grantmaking capacity and the impact of grantees’ programs. Fourth, many participants said that they are interested in gaining better access to up-to-date information about other foundations’ grantmaking interests, and to practical information related to the craft of grantmaking (such as designing basic metrics and working more effectively with boards). Fifth, participants are seeking improved professional networking opportunities that would allow them to identify and connect with peers that could provide information and resources, which was reported to be one of the most productive means of sharing and collecting information. Based on these participant comments, this information audit sought to identify and explore these information needs in the following areas:

- Better synthesis and analysis of existing information, rather than simply more information;
- Just-in-time information and analysis with robust search capabilities;

- Information that could better measure the impact of funding on educational outcomes;
- Information on the craft of grantmaking; and
- Expanding professional networking opportunities.

This study paid particular attention to various segments within GFE’s membership as participants also had some significantly different as well as common needs for information. For example, those newer to grantmaking were particularly interested in learning about practical issues related to the craft of grantmaking. Those newer to the field of education emphasized a need for better resources concerning the background, history, and context of the specific issues with which they were grappling. Experienced grantmakers were more likely to discuss the challenges they faced in trying to stay current with developments in the field, including best practices and assessment.

The culture within grantmaking organizations will also influence the ways that a knowledge management system is used. For example, participants described a high demand for information, part of which can be attributed to their on-going appreciation for learning. Many of the participants, to be sure, portrayed information gathering as time consuming and difficult, yet they also spoke about its key benefits in keeping them interested and engaged in their field. At the same time, many participants described their own frustrations as they sought to enhance opportunities for sharing, partnering, and collaboration, all of which they described as needed within their own foundations and for the professional development of the field at large. While those in corporate philanthropy more often reported the need to “scrub” internal research and evaluation materials for external distribution, overall, participants indicated that norms within the field of philanthropy concerning a reticence to share information are changing—but more slowly than many would like. Most participants indicated that they would welcome efforts that would assist in this process.

Grantmakers overwhelmingly described GFE, with its reputation for being neutral, proactive, and effective, as the appropriate organization to advance the field of grantmaking by developing a knowledge management system. They emphasized, however, that this is a significant and new responsibility, and encouraged the organization to make conscious and strategic decisions about how much staff time and resources would be necessary to ensure that the endeavor would be successful, as opposed to starting the project full speed ahead and realizing that their resources were not sufficient to keep the system up-to-date, relevant, etc.

Based on these findings, the final section of this study identifies several conditions under which a knowledge management system might be most successful in tapping into the high demand for information in the field of educational grantmaking. These conditions not only offer opportunities for success, but also can help in identifying some of the key challenges that emerge in developing and maintaining a knowledge management system. These conditions for success represent important areas of reflection concerning GFE’s appropriate level of involvement and commitment of its own resources. The conditions for success include the following:

- Remaining current and flexible;
- Offering a system that is easily queried by a wide range of factors (such as education issue, funding support, geographic location, etc.);
- Establishing key functional areas;
- Promoting communities of practice and a culture of information sharing; and
- Measuring and assessing ongoing impact.

Based on this information audit, it appears that the current information climate within and among foundations is conducive to the development of a knowledge management system for educational grantmakers. At the same time, it is clear that developing such a system is a significant undertaking that brings with it many challenges as well as opportunities. The success of the system will depend, in part, on the extent to which GFE can provide and sustain the resources needed to offer a high-quality knowledge management system that not only offers up-to-date information and analysis, but also a space for the kinds of conversations that can move the field forward.