



Inquiry-Driven Grantmaking: A Guide for Grants Management & Operations Staff

Overview

AN INQUIRY-DRIVEN approach makes grants management and operations functions even more important. Inquiry-driven practice positions you as a designer of learning-enabling systems, rather than an enforcer of procedures.

In this approach, your work helps create conditions that allow curiosity, flexibility, and reflection to coexist with accountability. The forms you design, the data you collect, the timelines you set, and the processes you maintain all shape what your foundation is able to learn. When you align operational systems with inquiry, you help the foundation capture insights that ultimately drive deeper impact.

Why It Matters Now

Philanthropy is operating in an increasingly complex and rapidly changing environment. At the same time as many foundations are placing greater emphasis on learning, equity, and responsiveness, operational systems in many institutions were designed for stability, predictability, and control.

As a grants management or operations team member, you sit at the intersection of these tensions. The tools, requirements, and workflows you maintain directly shape how flexible a foundation can be, how much burden is placed on grantees, and what kinds of knowledge can be captured and shared. You have the ability to help move your foundation toward more inquiry-driven approaches by aligning operational infrastructure with learning priorities.

Possible Actions You Can Take

Tactical (Start This Quarter)

- **Embed learning into existing processes:** Add reflective prompts

Strategic (This Year)

- **Redesign systems around questions:** Align grants management software

Cultural (Long-term Investment)

- **Position operations as a learning**

to reporting templates (e.g., “What surprised you?” or “What questions are emerging?”). Ensure reporting structures capture qualitative insights, not just quantitative metrics.

- **Streamline for flexibility:** Identify where rigid requirements may unintentionally limit grantee adaptation or learning. Create options for different reporting formats (e.g., written, verbal, or hybrid).
- **Improve data usability:** Organize grant records so that learning themes and questions can be tracked over time. Tag grants by inquiry areas or learning priorities.
- **Clarify expectations:** Communicate to grantees how learning and reflection will be used. Ensure internal teams understand what information is being collected and why.

fields with learning priorities and inquiry questions. Develop internal dashboards that surface patterns across grants, not just grant status.

- **Balance accountability and learning:** Work with program teams to identify reporting approaches that support both oversight and reflection. Create structures that allow for course corrections without triggering administrative burden.
- **Strengthen knowledge flows:** Build processes that ensure that insights captured through reporting are shared across teams. Support synthesis efforts by organizing data for pattern recognition and analysis.
- **Reframe operational success:** Shift internal metrics from speed and compliance alone toward measuring usefulness of information gathered.

partner: Foster shared understanding that operational systems shape what a foundation can know. Encourage cross-team collaboration between grants management, program staff, and learning teams.

- **Normalize flexibility within structure:** Help build organizational comfort with adaptive timelines, evolving goals, and iterative reporting. Advocate for processes that accommodate change while maintaining accountability.
- **Shift definitions of rigor :** Reinforce that rigor is not only about standardization and consistency, but also about reflection, synthesis, and meaningful insight.
- **Build inquiry into institutional memory:** Design systems that preserve how questions evolved, what was learned, and how decisions changed over time.

