



# Inquiry-Driven Grantmaking Resources



Introduction to Resources: From Aspiration to Implementation	1
Grantmaking Program Officers	2
MEA Staff	5
Senior Leadership	7
Communications Staff	9
Board Members	11
Grants Management and Operations Staff	13



# From Aspiration to Implementation: A Note to Fellow Practitioners

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**W**HEN WE STARTED sharing our inquiry-driven approach with colleagues across philanthropy, I expected questions about methodology or theory. Instead, the most common response was: “That makes sense, but how do I actually do it?”

That question stuck with me because it reflects something I’ve experienced throughout my career in grantmaking: the gap between aspiration and implementation. We attend conferences where speakers challenge us to “center community voice” or “embrace innovation,” and we nod along. Then we return to the everyday realities of the job: managing grant portfolios, maintaining evaluation frameworks, and writing reports.. The question isn’t *whether* inquiry matters. Rather, it’s *how* to practice inquiry within the constraints and structures we navigate daily.

The role-specific guides that appear in the following pages are our attempt to answer that “how” question. They’re neither perfect nor prescriptive, but offer insights from our journey that might inform yours. Our invitation: start where it makes most sense for you.

## What These Guides Are

The guides are written for five distinct roles within philanthropy because inquiry-driven work looks different depending on where you sit. What a program officer can control differs from what a communications director can influence, which differs from what a board member can shift. These guides acknowledge the specific leverage points, challenges, and opportunities inherent to each position.

You’ll also notice each guide is organized around three

levels of action: tactical steps you can take this quarter, strategic shifts you can pursue this year, and cultural changes that require longer-term investment. We hope that this approach will allow you to act where and how it makes sense for your context.

Finally, these guides reflect honest conversations with colleagues across the sector about what gets in the way. Time constraints. Board expectations. Legacy systems. The tension between flexibility and accountability. The discomfort of not having clear answers. We haven’t solved these tensions, but we’ve found that naming them explicitly helps us develop approaches to mitigate them.

## What These Guides Are Not

These guides are not prescriptive blueprints that must be followed sequentially. They’re not arguments that inquiry-driven work is the only valid approach. They’re not suggestions that you need to abandon everything you’re currently doing. Think of them instead as invitations to experiment, starting points for adaptation, and permission to begin wherever feels most relevant to your organization.

## Sharing and Learning

We’re sharing these guides because we believe the sector is hungry for practical tools that respect the complexity of institutional philanthropy while pushing toward more collaborative, learning-centered practice. If even one action item helps you ask a better question, create more space for grantee expertise, or shift how your organization defines success, these guides will have served their purpose.

We’re excited to learn alongside you.



# Inquiry-Driven Grantmaking: A Guide for Grantmaking Program Officers

## Overview

AS A PROGRAM OFFICER, you are the bridge between foundation strategy and the field. You meet potential partners, develop grant proposals, maintain relationships with grantees, and gather insights from the ground. An inquiry-driven approach repositions your role from evaluator of grantees to co-investigator and learning partner. Instead of assessing organizations against predetermined criteria, you work collaboratively to identify meaningful questions, design experiments to explore them, and generate insights that reshape both your foundation's strategy and the broader field.

## Why It Matters Now

The challenges you're funding—whether in education, health, economic mobility, or climate—are changing faster than traditional grantmaking cycles can accommodate. Communities are seeking more authentic partnership and voice in philanthropic decision-making. Meanwhile, you cannot rely on your expertise alone to respond to the full complexity of rapidly evolving systems.

### An inquiry-driven approach allows you to:

- Respond effectively to changing conditions rather than remaining locked into multi-year strategies that may become obsolete.
- Build genuine partnerships where grantees shape questions beyond responding to foundation priorities alone.
- Generate learning that informs not just individual grant renewal decisions but broader strategic pivots.

- Surface insights from proximate leaders that would be impossible to access through traditional due diligence.

The shift toward questions isn't about working harder—it's about working *differently* by focusing your time on relationships and learning instead of transactional processes.

## Possible Actions You Can Take

### Tactical (Start This Quarter)

- **Reframe your sourcing calls:** Begin meetings by asking potential partners, "What questions guide your work? What keeps you up at night?" before explaining your strategy.
- **Conduct question audits:** Review your last 5 RFPs or email outreach. Circle directive language (e.g., "We fund X") and rewrite as open questions (e.g., "What approaches to X are showing promise?").
- **Start check-ins with grantee questions:** Ask "What are you most

curious about right now?" before asking about grant progress.

- **Model "I don't know":** In meetings with grantees and colleagues, practice saying "I don't know" or "I'm uncertain about..." when true. Notice what new directions it unlocks.
- **Debrief by asking "What surprised you?":** After every sourcing call or check-in, jot down one thing that challenged your assumptions. Share with colleagues monthly.
- **Celebrate failure:** In your next team meeting, share one grant that generated valuable insight despite not working as planned.

### Strategic (This Year)

- **Co-design grant hypotheses:** For your next three grants, hold working sessions with prospective grantees in which you collaboratively design an inquiry question and evidence plan for the grant in lieu of a traditional proposal.
- **Build in assumption-testing:** Before

finalizing proposals, explicitly list 3-5 assumptions embedded in the work and what evidence would validate them or prove them wrong.

- **Create learning circles:** Organize three to five grantees working on related questions into a peer learning cohort that meets quarterly to share emerging insights around a shared set of questions.
- **Track question evolution:** For active grants, document how core questions change over six months. What caused shifts? Present findings to your team.
- **Develop a proximate leader advisory group:** Identify five to seven people closest to problems you're funding (i.e., not traditional experts) who can help identify knowledge gaps and suggest who you should be talking to.

### Cultural (Long-term Investment)

- **Advocate for different success metrics:** Propose that your team track "quality of questions asked" alongside dollars deployed or programs funded.
- **Shift check-in purpose:** Explicitly tell grantees that renewal isn't contingent on hitting metrics but on quality of learning. Ask: "What surprised you? What would you do differently? What new questions emerged?"
- **Create space for reflection:** Block two hours monthly on your calendar for synthesis in which you read reports, connect insights, and identify patterns. Keep a journal of what you are learning and questions that you still have. Review these reflections every quarter, and adjust practice based on learnings.
- **Encourage peer learning:** Start a monthly lunch with other program officers where each person brings one confounding question from their work for collective problem-solving. Document how actions taken as a result of these discussions differed from traditional practice.

### Next Steps

**This week:** Choose one tactical action and try it in your next grantee interaction. Notice what changes.

**This month:** Schedule 30 minutes with your supervisor to discuss what inquiry-driven approach might mean for your portfolio. Share one insight from this guide.

**This quarter:** Identify one upcoming grant where you can pilot co-designed questions and custom metrics (working with MEA staff as appropriate). Document what you learn.

**Remember:** Organizational culture change takes time. You don't need to transform your entire portfolio overnight. Start with one question, one grant, one relationship. Pay attention to what shifts. Share what you learn. The cumulative effect of many small experiments creates the foundation for larger transformation.





# Inquiry-Driven Grantmaking: A Guide for Measurement, Evaluation & Learning Staff

## Overview

AS EVALUATION and learning staff, you design systems for assessing grant effectiveness, synthesizing insights across portfolios, and demonstrating impact to boards and stakeholders. An inquiry-driven approach fundamentally reframes your work; instead of measuring predetermined outcomes, you assess the quality of learning. Instead of proving success or failure, you track how questions evolve, what insights emerge, and how findings reshape strategy. Your role shifts from compliance monitor to knowledge architect. You design systems that help the foundation learn faster, adapt more nimbly, and share insights more generously.

### Why It Matters Now

Traditional evaluation frameworks do not always capture meaningful data. For their part, grantees spend enormous time reporting metrics that rarely inform decisions. Foundations chase “proof of impact” in contexts too complex for clean attribution. Meanwhile, valuable learning goes undocumented because it doesn’t fit standard reporting templates. Those templates do not prioritize reflections about what didn’t work, what was surprising, and what questions need deeper exploration.

### An inquiry-driven approach allows you to:

- Design evaluation systems that generate actionable insights rather than performative metrics.
- Create space to generate field knowledge from productive failures and negative results.
- Build learning loops where insights reshape strategy rather than sitting in reports.

- Redefine and demonstrate impact through quality of questions asked, rigor of investigation, and strategic adaptation.
- Position evaluation as partnership and learning rather than surveillance and judgment.

### Possible Actions You Can Take

#### Tactical (Start This Quarter)

- **Revise reporting templates:** Add these questions to standard reports: What surprised you? What would you do differently? What new questions emerged?
- **Track questions:** Create a simple spreadsheet documenting each grant’s core question. This spreadsheet can then be used to track how that question changes over time and what causes the shift.
- **Look for patterns across reports:** When reviewing reports from grantees and/or program officers, tag insights

that: (1) challenge assumptions, (2) generate new questions, (3) suggest strategic pivots, or (4) connect across portfolios.

- **Use “So what, now what” synthesis:** For your next round of grant reports, don’t just summarize findings. Rather, ask the following questions: (1) What patterns emerged? (2) What does this mean?, and (3) What actions should we take?
- **Make learning visible:** Create a one-page “insight of the month” that synthesizes one surprising finding across grants. Share it with program staff.

#### Strategic (This Year)

- **Co-design metrics with grantees:** For new grants, involve grantees in identifying how to measure learning as an indicator of success (working with program officers as appropriate). Offer menu of evidence options, including qualitative, quantitative, and participatory evidence..

- **Rethink evaluation frameworks:** Develop criteria for assessing quality of learning. Criteria should relate to the sharpness of questions, the rigor of inquiry, the grantee’s willingness to pivot, and the grant’s contribution to field knowledge. Pilot the criteria with three to five grants.
- **Build qualitative data infrastructure:** Implement qualitative data analysis tools (like [Atlas.TI](#)) or AI powered research tools (like [NotebookLM](#)) to systematically code and analyze narrative data from reports and check-ins.
- **Create visual learning maps:** Use tools like [Miro](#) to map connections between portfolio questions, grant hypotheses, and emerging insights. Share with program teams quarterly.
- **Establish a negative results repository:** Create a system for documenting and sharing with relevant stakeholders what didn’t work and why, treating failures as valuable as successes.

### Cultural (Long-term Investment)

- **Shift evaluation language:** Replace “Did you achieve outcomes?” with “What did you learn?” in all communications with grantees. Replace “success metrics” with “learning indicators.”
- **Build evaluation literacy:** Create resources that help program staff and grantees understand the difference between compliance reporting and action-oriented evaluation.
- **Advocate for learning budgets:** Propose that 10-15% of grant budgets explicitly fund learning activities such as convenings, documentation, reflection time, and peer exchanges.
- **Model uncertainty:** In board reports, explicitly name what you don’t yet know, what assumptions might be wrong, and what questions need deeper investigation.
- **Create feedback loops:** Make learning actionable by designing mechanisms for evaluation insights to trigger strategy discussions.

### Next Steps

**This week:** Review your most recent evaluation reports. Circle findings that generated new questions or challenged assumptions. How many findings are there? How were those findings used?

**This month:** Schedule conversations with three program officers to learn what insights they need to make better decisions. What questions are they asking that current evaluation doesn’t answer?

**This quarter:** Pilot one learning-focused evaluation with a willing grantee (working with program officers as appropriate). Co-design the questions together. Document what changes.

**This year:** Propose to leadership that the annual evaluation report be replaced by a learning agenda progress report that tracks question evolution, insight generation, and strategic adaptation.

**Remember:** You’re not abandoning rigor; you’re applying it to different questions. Measuring learning is methodologically challenging, but offers tremendous opportunities for deeper impact. Start small, document what you learn, and build the case for broader transformation. Organizational culture change takes time, but your work designing new systems and metrics creates the infrastructure that makes inquiry-driven grantmaking sustainable.



# 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.





# Inquiry-Driven Grantmaking: A Guide for Communications Staff

## Overview

AS COMMUNICATIONS STAFF, you shape how the field understands and approaches complex challenges. Your work goes beyond simply promoting your grantees or foundation; you have the power to shift narratives, surface new frameworks, and build collective knowledge across the sector. An inquiry-driven approach positions you as a field-builder and narrative architect, sharing the questions you're exploring, the insights you're generating, and the evolving understanding that's reshaping how communities and funders approach problems. Your role is to make learning public, invite diverse voices into question formation, and help build new narratives that change how entire fields think and act.

## Why It Matters Now

Narratives around philanthropy often position funders as experts, communities as recipients, success as linear, and solutions as replicable. Meanwhile, transformative insights about how questions evolve, what assumptions proved wrong, and which communities hold crucial knowledge remain locked in internal reports - or are not captured at all.

### An inquiry-driven approach allows you to:

- Build new field narratives that center questions, learning, and community expertise over predetermined solutions.
- Create collective knowledge infrastructure where insights from foundations' work inform others' strategies.
- Shift power dynamics by amplifying community voices in defining problems and solutions.
- Model transparency and intellectual humility that transforms sector norms.
- Generate thought leadership that

changes how the field approaches entire issue areas.

You're not just communicating about your foundation; you're helping build a learning ecosystem for the entire sector.

## Possible Actions You Can Take

### Tactical (Start This Quarter)

- **Produce questions-first content:** For your next major publication, lead with the questions driving your work, not the answers you've found. Frame the foundation as one explorer among many.
- **Consider new formats that center curiosity:** For example, you might create a "What we got wrong" series in which staff share assumptions that proved incorrect and explain how their thinking changed as a result. Or you might create a "What surprised us" series in which staff share one finding that challenged their assumptions.
- **Reframe "impact" stories:** In case studies, take a "warts-and-

all" approach, dedicating space to examining what was learned and what changed. Include descriptions of how those findings shifted the foundation's thinking.

- **Share insights in real-time:** Share emerging insights as they develop. Blog about confounding data, tensions between findings, and questions that need broader exploration. Offer periodic reappraisals of those insights as new evidence emerges.
- **Share questions on social media:** Post one compelling question from your grantmaking work to social media each month. Invite responses. Engage with different perspectives.

### Strategic (This Year)

- **Build "questions commons":** Create a public repository for foundation professionals to post questions, insights, and calls for collaboration.
- **Document question evolution:** Create public-facing "question genealogies" showing how your strategic questions changed over

time, what evidence caused shifts, and what you learned from abandoned directions.

- **Launch a cross-foundation learning series:** Partner with three to five peer foundations exploring related questions. Co-publish insights that synthesize learning across organizations, demonstrating collective knowledge-building.
- **Reframe thought leadership:** Instead of positioning foundation leaders as experts with answers, create platforms where diverse voices (including grantees, community members, practitioners, and others) wrestle publicly with shared questions.
- **Document productive tensions:** Publish pieces that surface important dilemmas, trade-offs, or competing values that the field needs to navigate.

### Cultural (Long-term Investment)

- **Shift from promotion to pedagogy:** Redefine your communications mission from “raising foundation profile” to “advancing field learning.” Measure success by how often others cite, build on, or challenge your insights.
- **Build narrative infrastructure for questions:** Create templates, formats, and platforms designed for sharing evolving understanding rather than finished products. Make works-in-progress visible.

- **Center community voice in narrative:** Systematically shift who tells stories. Support grantees and community members to publish under their own names, sharing their questions and insights without foundation filter.
- **Normalize uncertainty:** Make “we don’t know yet” and “our thinking is evolving” standard elements of foundation communications. Build cultural comfort with public learning.
- **Create accountability for narrative impact:** Track narrative shifts across the field. Are field conversations changing? Are different questions being asked? Are new voices being heard? What accounts for these shifts?

### Next Steps

**This week:** How could you reframe an upcoming communications piece so that it focuses on field learning rather than announcing foundation work? Develop a list of questions that the communications piece could help the sector explore.

**This month:** Map the dominant narratives in one issue area you work in. What stories get told repeatedly? Whose voices are centered? What questions aren’t being asked? What would it take to develop a counter-narrative?

**This quarter:** Convene three to give grantees working on related questions. Co-design a publication in which they share their questions, tensions, and emerging insights. Use your foundation’s megaphone

to curate and amplify, while allowing the grantees to lead the narrative.

**This year:** Develop a comprehensive “learning in public” strategy. What insights from your grantmaking could help to reshape field understanding? What kinds of publishing and communications infrastructure would allow you to share those insights in real-time?

**Multi-year:** Partner with evaluators and researchers on longitudinal studies tracking narrative change. How are field conversations evolving? What role did shared questions and public learning play? Document and share methodology so that others can learn from and replicate these investigations.

**Remember:** You’re not abandoning strategic communications; you’re recognizing that your foundation’s greatest contribution may not be the programs you fund but the questions you surface, the insights you share, and the narratives you help transform. Inquiry-driven communications creates public goods that outlive individual grants and give permission for others in the field to engage in similar work. When you publish a question that 20 other foundations start exploring, that’s multiplicative impact. When you shift a dominant narrative from “communities need fixing” to “communities hold crucial knowledge,” you’ve changed the conditions for everyone’s work.



# Inquiry-Driven Grantmaking: A Guide for Senior Leadership

## Overview

AS SENIOR LEADERSHIP - presidents, vice presidents, chief program officers - you set strategic direction, make final funding decisions, represent the foundation externally, and shape organizational culture. An inquiry-driven approach asks you to embrace leading with uncertainty, with questions rather than answers. This means committing resources to exploration without predetermined outcomes, valuing learning as much as impact, and modeling intellectual humility publicly. Your role shifts from chief decision-maker to chief learning officer, creating conditions where staff, grantees, and the broader field can pursue bold questions that reshape how we understand and address complex challenges.

## Why It Matters Now

Philanthropy is facing a legitimacy crisis. Communities demand authentic partnership, not paternalistic “solutions.” Climate, inequality, democratic fragility, technological disruption, and other challenges are changing faster than strategic plans can accommodate. Meanwhile, staff and grantees must navigate the gap between philanthropy’s public commitments to trust and learning and internal systems that still reward certainty and control.

## An inquiry-driven approach allows you to:

- Maintain strategic coherence while adapting to rapidly changing conditions
- Demonstrate genuine partnership and power-sharing with communities
- Attract and retain exceptional staff who want to learn, evolve, and effect real change
- Generate insights that can fundamentally reshape entire fields

- Model for the sector what responsive, humble, effective philanthropy looks like

## Possible Actions You Can Take

### Tactical (Start This Quarter)

- **Model “I don’t know”:** In your next three public speaking opportunities or board meetings, explicitly name what you don’t yet know or where you’re uncertain. Notice what new directions this framing unlocks.
- **Lead with questions:** Restructure one board presentation to lead with questions you’re exploring rather than strategies you’re executing. Reframe decisions as hypotheses to test.
- **Celebrate productive failures:** In all-staff meetings, dedicate time to sharing grants that didn’t work as planned but that generated valuable learning.
- **Ask staff about their questions:** In your next round of one-on-ones, ask program officers: “What question about your work keeps you up at night?” Listen for and document patterns.

- **Reframe budget presentations:** Present next year’s budget as investments in exploring specific strategic questions rather than as program allocations.

### Strategic (This Year)

- **Commission a question audit:** Have an external facilitator review your strategic plan, RFPs, board materials, and public communications. What percentage is directive vs. interrogative? Where do you assert answers vs. invite inquiry?
- **Reallocate resources toward learning:** Dedicate 10-15% of program budget to learning activities explicitly fund learning activities such as: convenings, documentation, reflection time, and peer exchanges.
- **Build learning infrastructure:** Invest in dedicated knowledge and impact staff, qualitative analysis tools, and time for synthesis. Make learning a core organizational function, not an afterthought.

- **Create board learning sessions:** Engage board members in exploring one strategic question each quarter. Invite diverse voices to challenge assumptions.
- **Launch shared question initiative:** Identify one question relevant across multiple foundations. Invite five to seven peer organizations to co-investigate these questions, sharing insights openly.

### Cultural (Long-term Investment)

- **Redefine success:** Shift what you celebrate and reward by including “quality of questions asked” in performance reviews.
  - **Restructure funding around questions:** Consider organizing portfolios around strategic questions rather than issue areas. Allow program officers to fund across traditional silos.
  - **Invest in question literacy:** Bring in question science experts (e.g., from Right Question Institute, GovLab, or Q-Lab) for staff development. Build capacity for rigorous inquiry.
- **Model long-term commitment:** Pick one or two major questions to explore over the next five years. Accept that you won’t have clear answers quickly. Communicate this publicly.

### Next Steps

**This week:** Block two hours for reflection. What questions does your foundation genuinely not know the answer to? If answered, which of those questions would most reshape your work?

**This month:** Convene the senior leadership team to discuss this question: What would need to change in our organization to make inquiry-driven grantmaking sustainable? Document barriers and enablers.

**This quarter:** Pilot an inquiry-driven approach in one portfolio or initiative. Give program officers explicit permission to experiment. Protect them from failure stigma.

**This year:** Commission the development of a “learning agenda” alongside your strategic plan. What do you need to learn to achieve your goals? Who needs to be asking questions alongside you?

**Multiyear:** Track question evolution by



creating a spreadsheet documenting how each grant’s core question has changed over time and what caused the shift. Commit to tracking how your strategic questions evolve over time. Publish question genealogies showing what you learned, what caused shifts, what you retired and why. Model intellectual humility for the field.

**Remember:** Your leadership creates permission for others to embrace uncertainty, ask hard questions, and pursue unexpected directions. This culture change takes years, not months. But your visible commitment to questions over answers, learning over certainty, and intellectual humility over expertise is what makes transformation possible.



# Inquiry-Driven Grantmaking: A Guide for Board Members

## Overview

AS A BOARD MEMBER, you provide governance, fiduciary oversight, and strategic guidance. You approve grants, monitor foundation performance, and ensure effective use of resources. An inquiry-driven approach asks you to embrace different questions in your oversight role. Instead of “Did we achieve planned outcomes?”, ask “What did we learn?” Instead of “How many grants did we make?”, ask “What questions are we pursuing and how are they evolving?” Your role shifts from judge of success or failure to steward of learning. You are responsible for creating governance structures that reward intellectual honesty, strategic adaptation, and genuine partnership with communities.

## Why It Matters Now

Unintentionally, traditional board oversight often incentivizes staff to overpromise and underreport challenges. You receive polished presentations most often showing successes while productive failures, surprising discoveries, and uncertainties stay behind the scenes. Meanwhile, the challenges your foundation addresses are changing faster than multi-year strategies can accommodate. Boards that demand predetermined outcomes and clear metrics may inadvertently prevent the adaptive learning that complex challenges require.

### An inquiry-driven approach allows you to:

- Enable foundation strategies to adapt, while maintaining accountability.
- Access honest insights about what’s workings.
- Demonstrate genuine commitment to community voice and power-sharing.
- Model intellectual humility and a

learning orientation to your foundation and for the larger philanthropic sector.

- Ensure foundation resources generate knowledge and insights that will be valuable for the entire field.

## Possible Actions You Can Take

### Tactical (Start This Quarter)

- **Ask different questions:** In grant reviews, ask, “What question does this grant explore?” and “What would we learn if this doesn’t work as planned?” alongside traditional due diligence questions.
- **Request learning updates:** Ask staff the following questions: What surprised you this quarter? What assumption did evidence challenge?
- **Create space for uncertainty:** When staff present proposed strategy changes, ask the following questions: What don’t you know yet? Where are you uncertain? What could make you change direction?

- **Celebrate pivots:** Publicly recognize strategic shifts based on learning
- **Diversify expertise:** Invite people with lived experience of issues you fund to present to the board and value their expertise in funding and strategy decisions.

### Strategic (This Year)

- **Revise oversight metrics:** Track the following metrics alongside your existing metrics: quality of questions asked, strategy adaptation based on learning, and insights shared with the field.
- **Create board learning sessions:** Dedicate 60-90 minutes each quarter to exploring one strategic question as a board.
- **Restructure grant reviews:** Review grants as hypotheses. Ask the following questions: What are we testing? What evidence would prove us wrong? How will we know when to pivot?
- **Commission a question audit:**

Request an external review of the foundation's strategic questions (also mentioned in the Senior Leadership Guide). Are the questions generative? Inclusive? Evolving appropriately? What voices are missing?

- **Invest in learning infrastructure:** Approve budgets that dedicate 10-15% of resources to learning activities such as convenings, documentation, reflection time, and peer exchanges.

### Cultural (Long-term Investment)

- **Model intellectual humility:** Publicly share what you're learning and where your thinking has changed.
- **Redefine accountability:** Evaluate grants based on the quality of inquiry along with progress toward predetermined outcomes. Shift your evaluation question from "Did staff execute the plan?" to "Did staff learn and adapt intelligently?"
- **Extend time horizons:** Approve multi-year commitments to exploring

major questions, accepting that clear answers won't come quickly. Resist pressure for premature conclusions.

- **Change incentive structures:** Support compensation and performance systems that reward learning and strategic adaptation.
- **Build flexible governance systems:** Create board structures flexible enough to respond to unexpected insights, including mechanisms for rapid pivots, mid-cycle strategy updates, and opportunistic investments.

### Next Steps

**Next meeting:** Ask executive leadership the following: What's one question our foundation genuinely doesn't know the answer to? If that question were answered, what would change about our work?

**This quarter:** Request that one staff presentation focus entirely on learning with no pressure to show success. Encourage staff to reflect on what surprised them, what they'd do differently, and what new questions emerged.

**This year:** Propose that the governance committee review the foundation's approach to failure. Do current structures create space for productive risk-taking? What would need to change?

**Multi-year:** Champion development of a public learning agenda alongside your strategic plan (also mentioned in the Senior Leadership Guide). What does foundation need to learn? Who should help answer these questions? How will insights be shared?

**Remember:** Your oversight creates the culture where staff feel safe to admit uncertainty, report challenges honestly, and pivot based on evidence. Organizational culture change often takes years. But as a board member, you can powerfully shape culture through what you ask, what you reward, and what you celebrate. The questions you pose in board meetings signal what you truly value. You give the foundation permission to embrace inquiry-driven work when you ask about learning, evolution, and insight generation. This shift may feel uncomfortable initially, but it's the governance model the moment demands.

