

# Innovation 2.0

## Grantmaking to Transform America's Education Systems

June 2011, Detroit, MI

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Learning in America is undergoing a sea change. As social and technological forces reshape the environment, the educational landscape is being similarly transfigured as parents, employers, policymakers and students grow impatient with incremental efforts to reform a broken system. Too often such efforts have proven both slow and inadequate to the evolving needs of learners: Innovations have been inequitably distributed, promising solutions have been difficult to implement at scale. Yet the signs of widespread change are real, and there is little doubt that transformation has begun.

During the last 18 months, and with deep engagement by more than one dozen education grantmakers, GFE has partnered with Collective Invention to produce a series of grantmaker convenings focused on transformative education innovation. More than 60 funders participated in one or more of the three meetings that took place in San Francisco, Chicago and Detroit.

GFE launched this series with a clear purpose in mind: Recognizing that America's current approaches to education are failing to serve many students well, and that our systems are not geared to cultivate the kind of learning students will need to succeed in our rapidly changing global economy, we sought to unite funders both to envision new directions for our education systems and to apply design techniques to their work to identify innovative solutions to intractable problems. In short, we designed the Innovation Series as a process both to explore new approaches to learning and new models for education as well as a means to expose grantmakers to new techniques and approaches for engaging in their own grantmaking practice.

Through this work we have developed an emerging vision for a new world of learning for students, and corresponding implications for how grantmakers can invest to realize this vision. We've also explored the implications for grantmaking to realize this vision, and have developed ten core pathways for transforming our education systems to meet current and future challenges. Similarly fundamental is the presentation of different models for funder engagement that mirror the changed learning practices for students.

This report begins with a quick overview of the key insights and strategies that emerged from our first two briefings in San Francisco and Chicago, captured more fully in their respective reports, *Innovation in Education: Redesigning the Delivery System of Education in America* (April 2010) and *Learning2025: A Working Paper From a Grantmaker Convening* (Fall 2010). The majority of this report, however, describes what happened when we gathered again, in June 2011 in Detroit, for our third briefing in the series. While our collective work at *Innovation 2.0: Grantmaking to Transform America's Education Systems* built on our earlier learnings, it more specifically addressed a new and different process for how grantmakers can develop their future-oriented investment strategies.

In April 2010, GFE convened 50 education grantmakers from around the country for a two-day design session and seminar, *Innovation in Education: Redesigning the Delivery System of Education in America*. This convening capitalized on a 2009 survey that found that 66 percent of GFE's member organizations were supporting education innovation or the development of new models of learning, and 33 percent planned to increase these investments. Yet despite the growing attention paid to innovation in education, we found it to be a loosely defined concept that was in need of greater articulation and structure.

## America needs to move toward a new system of learning...

What was clear: America needs to move toward a new system of learning that is calibrated to meet today's and tomorrow's challenges and is, at its core, focused on the differential needs of learners. But what might—and should—a student-centered system look like? What role can funders play in helping to fast-forward our nation's thinking and approach to education? What investments can we make to seed "next generation" designs and accelerate systemic transformation?

### **A New Approach: Experiential, Learner-centered Work Session**

The convening was designed to look and feel very different from traditional funder gatherings. With guidance from our design partners, Collective Invention and the KnowledgeWorks Foundation, we conceived this gathering as an experiential, learner-centered work session designed to generate fresh thinking about what a 21st-century educational system might look like.

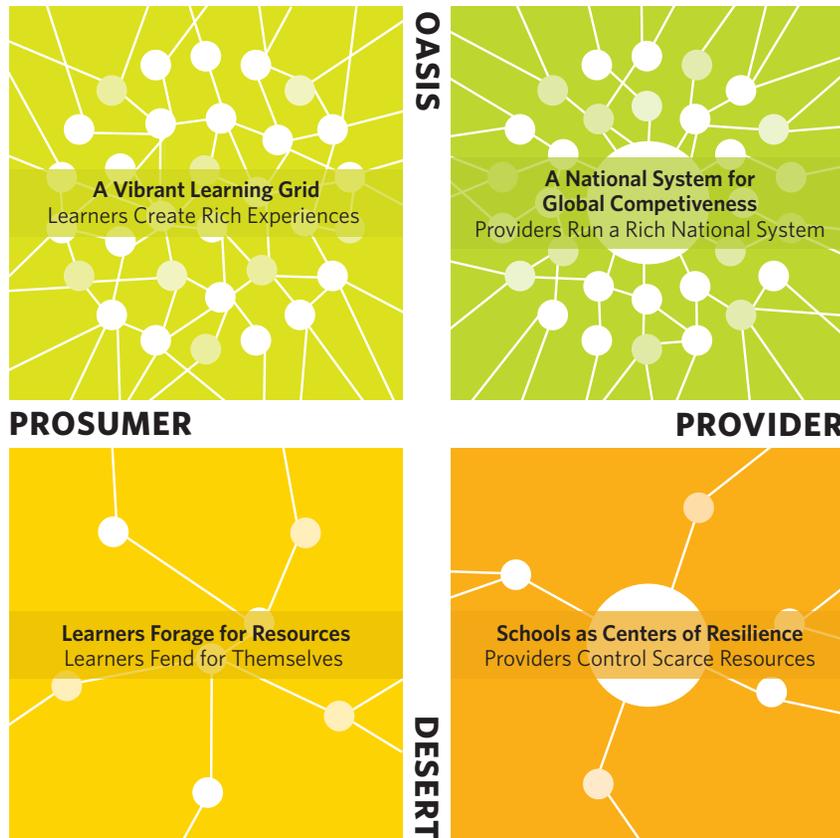
- **Prior to the gathering, participants were invited to assume the identities of one of eight high-school-age learners in the year 2025.**

Each learner's "dossier"—shared through an online simulation—included demographic details (age, location, socioeconomic status), information about their personal learning style, and first-person accounts of their aspirations and dilemmas. Grantmakers were then invited to arrive to the meeting in character, working in discussion groups with other future learners to identify from a firsthand perspective what education systems would need to look like to enable their persona to succeed.



• **Participants then explored four scenarios that described America's possible educational and geopolitical futures based on two critical uncertainties.**

Will there be a profusion of new learning alternatives (a "learning oasis") or a highly standardized, narrower selection of models (a "learning desert")? And will learning be controlled by "prosumers" (consumers who also produce content) or central providers (such as the Federal Government)? Participants then applied what they had come to learn, through earlier exercises, about the needs of future learners as a filter for analyzing the four scenarios.



Walking through these alternative worlds of learning, participants became clearer about the diverse needs of learners. Through an accumulated understanding of the eight personas, combined with their own professional knowledge, participants investigated three questions:

- As a future learner, what do I need?
- What must be true of the future learning system to support me?
- What pathways for investment will be necessary to create the learning system to meet the needs of future learners?

Their answers to these questions laid the groundwork for the "10 Pathways" strategic framework that would be the centerpiece of the next Innovation Series briefing that took place in Chicago in September 2010.

**Key Learnings from San Francisco**

- **Funders must learn how to work differently to support transformative innovation.** We need to build on the field's knowledge and best practices and collaborate authentically with one another—and consider syndicating our resources. We need to think more systematically and longer term while also becoming more nimble and responsive to new patterns and new learnings. We need to become evangelists inside our organizations for funding a learner-centered future, helping trustees and others reach a shared commitment and vision.
- **We need a shared agenda for deepening our understanding of learners' needs and new models for learning.** We need a shared definition of "student-centered learning" that incorporates other perspectives and voices—including the voices of students. We also need appropriate metrics and measures. We need to produce and share case studies and foster a learning community committed to joint learning about what does and doesn't work.
- **We need to develop a better understanding of the innovation process.** We need to explore collaborative funding models and deepen our understanding of tools like rapid prototyping. We need to experiment in our grantmaking, take intelligent risks, and have the courage to "fail forward" and to invest where we see promising solutions. We should convene business, funders, systems engineers, product managers, students and designers in a research and development cycle. We need an innovation lab, accompanied by venture funds, for the field.

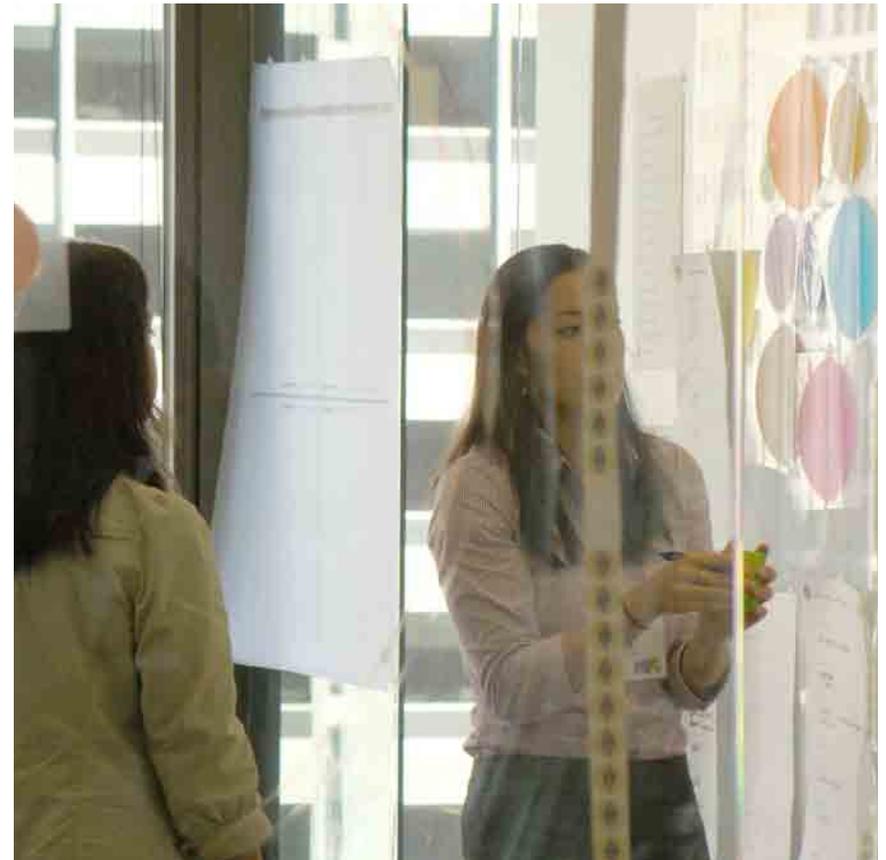
In late September 2010, representatives from 10 grantmaking organizations converged in Chicago for the second meeting in the series, *Learning2025: Forging Pathways to the Future*. Our goal in this session was to learn more about investment in this emerging field of work by exploring the theories of change held by various funders, paying particular attention to the ways they intersect and/or differ; learning about specific investment strategies for the next 24–36 months; and mirroring back what we are learning about grantmakers' efforts to transform education.

The San Francisco briefing had yielded a draft set of design principles for a learner-centered future. These were then refined between briefings into a set of 10 strategic pathways. Participants at the Chicago gathering were greeted with an initial draft of these pathways, refining and revising them through discussion and reflection.

**10 Pathways to a New World of Learning in 2025:  
High-leverage Avenues for Investment**

(Revised June 2011)

1. Framing a research agenda for continued improvement of learning
2. Defining 21st-century critical skills and knowledge—and setting these as outcomes for education
3. Prototyping and scaling new models of learning
4. Fostering personalized learning in a community context that extends beyond traditional schools
5. Delivering on the promise of digital media
6. Reimagining assessments of—and for—learning
7. Defining new governance models tailored to the particular learning contexts where they operate
8. Innovating funding mechanisms to enable greater choice, equity and/or new learning models
9. Fostering public will for new kinds of learning and new learning outcomes
10. Advocating policy that enables new kinds of learning and new learning outcomes



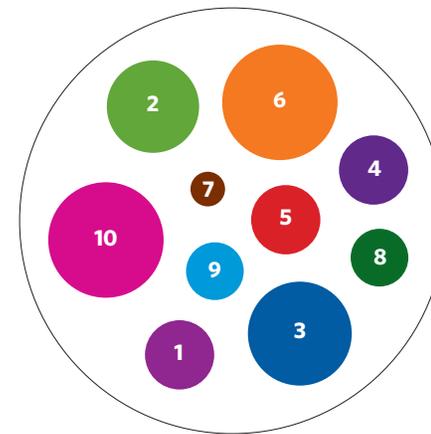
**By the Numbers**

Participants mapped how their grantmaking correlated with the 10 investment pathways. First they identified the percentage of their education portfolios that aligned with the pathways. Then they indicated the pathways in which they had current investments and estimated what percentage of their *Learning2025*-related funds they had invested in each pathway. The maps of current investments showed that grantmakers are currently paying uneven attention to the 10 investment pathways. (These graphics have been updated to reflect the June 2011 revision of pathway numbers.)

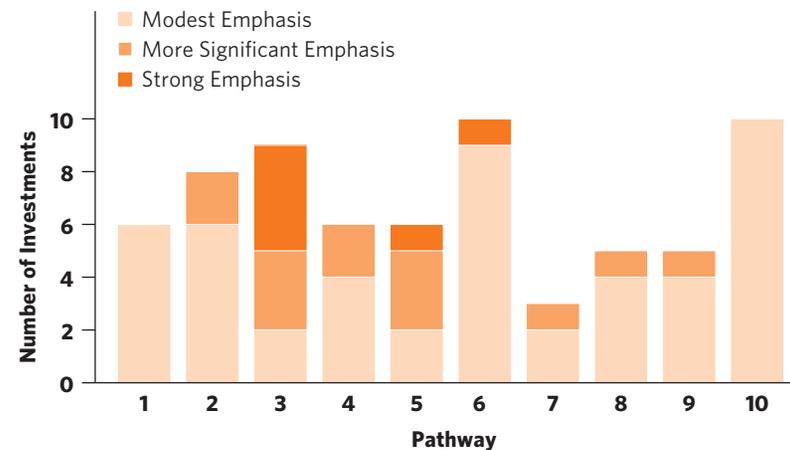
**Pathways**

- |                    |                          |                       |
|--------------------|--------------------------|-----------------------|
| 1. Research Agenda | 4. Personalized Learning | 8. Funding Mechanisms |
| 2. Critical Skills | 5. Digital Media         | 9. Public Will        |
| 3. New Models      | 6. Assessments           | 10. Advocating Policy |
|                    | 7. Governance            |                       |

**Number of Investments by Pathway**



**Concentration of Investments by Pathway**



## What Grantmakers Need

### ...designing the next generation of learning.

During the course of the convening, participants engaged in broad and deep thinking about the future of learning and their role in fostering it. During discussions, they articulated a range of needs, unknowns, and tensions affecting their work and the learning system as a whole; identified stressors and trends affecting education in the U.S.; reflected on their own roles as grantmakers working to improve the education system; raised questions about what transformative innovation would mean for the field of education philanthropy; and explored their possible roles in designing the next generation of learning.

Grantmakers also identified seven key needs that must be addressed in order for their efforts to support and foster transformative education to come to fruition—many of which echo earlier revelations from the first briefing.

- **Become more nimble.** We need to be more adaptive, flexible, and iterative in our grantmaking approaches. Rather than treat theories of change as facts and hold grantees to outcomes, we need to be willing to test hypotheses and develop a “versioning” way of working.
- **Engage others in this transformation.** We need to get our trustees and more philanthropists on board, and we need to engage the public—our ultimate source of demand for transformative innovation in education. We also need to greatly improve our message management, partnering with people who are good at it.
- **Create greater coherence around transformation.** Developing a shared language is key to enabling better communication and coordination. If we were more aligned, we might have a richer ecosystem of people working with us.

- **Track innovative models that already exist.** We need a clearinghouse around innovation practices, so we can keep up with new pilots and experiments in next-generation learning. Program-related investments and new public-private funding models may be key.
- **Exchange ideas about how to work toward transformation.** We need to learn more about different approaches and models for funding and working together. Could there be a peer-to-peer engagement of how to work? We also need to keep in mind that transformative change often comes from outside the system—and talk about these investments as well.
- **Explore partnerships.** For grantmakers, the next stage is to build more strategic, aligned commitments. So we need more information about public/private partnerships and how to fund them. We also need accounting and metric systems that can account for this kind of collaborative engagement.
- **Share research within a shared infrastructure.** How do we co-develop research and infrastructure? Might it be possible for multiple funders to share the expense of building the infrastructure to support the proliferation of new models and digital media?

Finally, participants highlighted particular supports that would be helpful in meeting these needs:

- “Deep dives” on particular pathways
- Nimble, creatively developed conferences or webinars that move us from “innovation briefings” to “innovation studios”
- Inclusion of non-grantmakers in an “innovation studio” process or other conversations
- Shared research initiatives
- Meta-analysis and meaning-making from shared research

These seven needs—and the five related supports—became scaffolding for the next convening in Detroit.

## ...diving deeper into the funder's role in generating new solutions to problems of education practice.

The Detroit briefing built on the work and insights that emerged from the previous two gatherings by diving deeper into the funder's role in generating new solutions to problems of education practice. Roughly three-dozen funders from a cross-section of GFE member foundations attended, half of them Innovation Series newcomers. For participants who missed the first two briefings, we provided a web-based "onramp" that reprised essential elements of the earlier work and how it evolved. We also ran a half-day convening the day before the meeting's kickoff, giving new participants the opportunity to build on the previous findings and add their voices and perspectives to the collective work taking shape.

The Detroit briefing had three primary goals:

- To expose GFE members to a lively example of 21st century learning in action;
- To collaborate on concrete problems of grantmaking practice via innovative design methods; and
- To begin laying the groundwork for a more formal platform through which our collective work might continue.

### 21st Century Learning in Action

It was no accident that our third briefing took place in Detroit—a city designed for a different era that is now actively *redesigning* itself for a post-industrial, 21st-century world. Once the world's automotive capital and fifth largest city in America, Detroit's population has decreased 25 percent since 2000 and unemployment within city limits now stands at 20 percent. Despite this, the city is reinventing itself with the future in mind, investing in a creative corridor and establishing a foothold in the emerging maker economy.

The briefing took place at the A. Alfred Taubman Center for Design Education, an education complex located at the College for Creative Studies, a next-generation university for visual artists and designers. The Center is housed within a revamped



General Motors R&D facility, where students are preparing to "enter the new, global economy where creativity shapes better communities and societies." In doing so, this college and these students are modeling the very ways of working that GFE members seek to incent through innovative grantmaking.

The Taubman Center also houses the Henry Ford Academy: School for Creative Studies, a tuition-free public charter school that teaches students about problem solving and design from an early age. Founded in 2009, the school was "...built on the idea that learning needs to be hands-on, connected to the real world, and should develop not only students' academic knowledge and skills but also their potential as creative thinkers and innovative problem solvers." With a vibrant, future-oriented ambiance, the school's mission of "Engaging students and preparing them for the future through our college preparatory curriculum, career exploration, and real-world experiences that focus on innovation and creativity" resonated as a compelling example of our meeting's purpose.

A cornerstone of Detroit's emergent creative economy, the College for Creative Studies and the Henry Ford Academy represent a breakthrough model for 21st-century learning from sixth-grade through college. Set against the larger backdrop of Detroit, they also served as an ideal venue for our Innovation Series briefing—a 1.5-day convening in which participants explored new learning models not just for future students but for themselves as grantmakers.



### Innovation Studios

The briefing was organized to introduce participants to the innovation studio methodology, a peer-to-peer process designed to access the wisdom of people with usefully different perspectives, knowledge bases, skills, and processing styles. In the innovation studio, also known as the “charrette”, participants learn through doing real-world work: exploring concrete problems, prototyping and piloting new solutions, new programs and new operating models.

In Detroit, participants learned how to apply the innovation studio process to concrete problems of education grantmaking practice. The problems were drawn from grantmakers’ actual work; prior to the meeting, participants were asked to identify a strategic challenge they were wrestling with related to one or more of the 10 pathways, as well as the implications of that challenge for their grantmaking practice. The innovation studio process then engaged small groups of grantmakers in a design process that aimed to bring new insights and solutions to these problems, organized around six challenges identified by their peers.

In each Studio, the grantmaker who proposed the challenge served as the “client,” kicking off the work by describing the challenge and his or her organization’s approach to it. Then group members crowd-sourced the problem, quickly working through a series of steps designed to infuse new thinking into the issue by approaching it collaboratively and from new angles. In every case, the process generated rich new insights, perspectives, and strategies that the “clients” could then carry back with them to their organizations.

Below we walk through one of the six innovation studios in depth, articulating how the process worked, and illustrating the “worksheets” used to guide participants through this process. Following that, we provide brief summaries of the challenges addressed in the other five Innovation Studios.



### Charrette

“Charrette” is a French term used by architects and designers to mean an intensive, round-the-clock collaborative teamwork session. A central characteristic of the charrette is visual idea generation. All thinking is done in rapid visual iterations, proceeding from the roughest early concepts to successively more refined versions. All working materials, including all reference material, data, and creative stimuli, as well as work products are put on the walls. This gives everybody the same shared view of the content as it emerges and the same shared history trail of the collaborative body of thought as it grows. Everybody feels free to annotate, rearrange, cluster and reorganize the material constantly.

The effect is like viewing a visual, neural-network map of the collective mind of the project team. This stimulates the spontaneous cross-linking of previously unrelated ideas and the pattern-recognition of larger gestalts—the “Aha!” imaginative leaps uniquely characteristic of the higher mental functions we call “creativity.”

## Innovation Studio Spotlight

### The Rodel Foundation of Delaware

Dorothy Jacobson

#### Primary Pathway

Identifying new forms of governance (No. 7)

#### Question

How might we ensure that elected (or appointed) school governors are better prepared to take on this responsibility and to exercise their authority even as we explore entirely new structures for the future system?

#### Overview

The goal of this Innovation Studio session was to explore, propose, assess, and frame potential new approaches to school governance. As Jacobson explained in her Innovation Studio proposal, some 14,000 school districts nationwide are governed by boards that exercise considerable control over schools including: being responsible for hiring and evaluating superintendents; evaluating and adopting school policies; monitoring and adjusting millions of dollars in district finances; negotiating collective bargaining agreements; proposing local school tax rates; and serving as a judicial body for unresolved conflicts.

Yet more often than not school board members are elected or appointed as individuals rather than as members of a team selected for their complementary skills. They often earn their positions from a very small number of voters in elections that are scheduled off-cycle to “remove the politics” from local school governance. And a considerable amount of formal board action is focused on maintenance and micromanagement of building-level issues rather than policy development and oversight.

The task, then, for Jacobson’s group was to examine the power of school boards and the feasibility of redesigning local governing structures that would support the new modes of instruction and learning envisioned in other GFE innovation pathway work. The group would take apart what’s possible, what’s not, and explore new ways to create, support, and advance a school/district governing structure that supports innovation. How might grantmaking organizations—not just the Rodel Foundation—help ensure school governors are better prepared to take on this responsibility and to exercise their authority even as they explore entirely new structures for the future system?



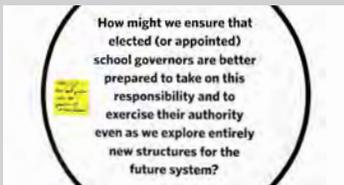
“Nationally, the grantmaking community has been largely reluctant to engage in school board governance, other than through modest investments in public information about the role of boards and training of board members once in office.”

#### Step 1:

##### Understanding the Challenge

While this Studio topic touched on several of the 10 pathways, its central focus—school boards—has long been under explored territory for foundations. “Nationally, the grantmaking community has been largely reluctant to engage in school board governance, other than through modest investments in public information about the role of boards and training of board members once in office,” Jacobson explained. And because foundations are legally restricted from directly participating in the electoral process, taking action to help improve and influence school governance has seemed tricky at best.

Yet a recent controversy in Delaware—pitting a local board against the state’s Race to the Top agreements, its governor, and both state and national secretaries of education—prompted the Rodel Foundation to start exploring grantmakers could might play a role in improving, or even reinventing, the way schools are governed. “My goal with this session was to figure out how to make school board quality an issue relevant to everyone in that room,” Jacobson explained.



**The “How Might We” Question: Possibilities Before Practicalities**

As professionals we are generally very skilled at analytic and evaluative thinking. Under certain circumstances we can be very good at expansive, big-picture thinking. Few of us, as it turns out, are consistently adept at the metacognitive skill of knowing when to deploy these different thinking styles, and find ourselves inadvertently working at cross-purposes with our colleagues. Some of us busily generate many ideas and feel thwarted by others’ unwillingness to defer judgment. Others lose patience with creative enthusiasts’ lack of discrimination.

One function of the Innovation Studio is to demonstrate when and how to use divergent thinking (for the generation of as many ideas as possible) versus convergent thinking (for the purposes of deciding between multiple options). Convergence is stimulated by evaluative questions like, “Is this consistent with our strategy?” or “Do we have resources to do this now?” On the other hand, open-ended “How might we” questions enable what cognitive scientists call the more generative “construction zone” of thinking. Having generated a large set of options together, we can then collaboratively exercise judgment to choose between them.

**Template: Forces Driving Change**



The process began with Jacobson, the “client,” providing a brief overview of her foundation and its relationship to the issue: what was their organizational strategy, and how did decisions get made? Jacobson then presented a “how might we” question designed to capture the essence of the challenge. The group helped refine the question by interviewing Jacobson and teasing out the assumptions embedded within it. Using pre-designed templates, the group then graphically depicted the challenge in the context of the organization and the system in which it operates—creating a “map” of the

issue. Jacobson also briefed the group on what was known or not known about the problem and what was “in bounds” or “out-of-bounds” in terms of viable innovative solutions.

The latter turned out to be an important detail for this group because of the nature of the challenge they were addressing. “Whatever we recorded on our worksheet had to be things that qualified as legally permissible for a foundation to implement,” said Jacobson. “We couldn’t say, ‘Getting better school board candidates elected’ because that is squarely out of bounds.” So they noted “C3-eligible activities” as a reminder of a project boundary.

**Step 2:**

**Discovery and Concept Generation**

With the focal question firmly established (How might we ensure that we have highly competent school boards that support new models of learning?), the group moved on to a series of “divergent thinking” exercises designed to broaden and deepen their collective understanding of what was possible. First, they gathered outside perspectives on the question by looking at examples, comparators, and provocations from other domains such as business, health-care, or community development. Next the group rapidly brainstormed new approaches to the challenge by interviewing one another in pairs using this question as their guide: If you had six months and decision-making authority, how would you bring your own experience to bear on this problem?

According to Jacobson, this stage of the process “stretched all of our brains into new places.” The group brainstormed more than 50 ideas, many of which nobody in the group had ever thought about before—including Jacobson. “In the space of an hour,” she said, “the traditional concept of a school board itself was blown apart.”

### A Sampling of the 50+ Ideas

- A virtual school board
- A school board whose members are not elected but selected based on their individual, complementary talents
- A school board with a different purpose: what if every school board operated according to a guiding principle? If a school board took increasing equity as its guiding principle, a lot of what a school board does today would fall away.
- Tying school boards to demonstrated results (e.g., Henry Ford Academy, whose building lease is tied to whether it meets its 90/90/90 objectives)
- A school board not for every district—but for every single school
- A statewide academy to train school board members—and possibly potential school board members



“The conversation started during the Innovation Studio is already playing out with our partner organizations. And school boards are now something we’re going to be looking at as an area of potential focus.”

For Jacobson, this novel brainstorming process—and the new perspectives it elicited—proved extremely valuable. “To have people from all over the country, unconstrained in their ability to be open-minded, working on the question together? That was a huge benefit for me, and it enabled me to be unconstrained as well,” she said. “I think we all found it energizing.”

### Step 3: Story Building

Next, the group annotated, rearranged, clustered, and reorganized its ideas into an affinity map, finding new patterns through that process. Then they used a forced ranking system to establish the two or three concepts that seemed most promising to explore further given three criteria: advancing the client’s mission, moving everyone collectively closer to *Learning2025* goals, and working effectively at multiple scales. The group then spent an hour adding detail and color to its selected ideas using a “story builder” template.

### Story Builder Chart: Strengthening Local School Boards

Topic 1: Define Criteria	Topic 2: Engage with the Public	Topic 3: Tools for Candidates & Incumbents
Add accountability	Messaging	Education governance institute
Add functional skill set	Community co-creation	High-potential leadership institute
Define metrics (e.g., 90/90)	Community leader engagement	Mentoring
Rename board (e.g., to “school accountability council”)	Integrated communications	Board certification
	Nonpartisan, nonpolitical voter guide	
	Citizens’ board watch program	
<b>Result: Raises the bar</b>	<b>Result: Builds ownership</b>	<b>Result: Provides support</b>

**Goal:** To ensure we have highly competent school boards that support new models of learning

**Main Point:** Requires highly competent school board members who support new models of learning

**Outcome:** Excellent education for all students

By the close of the studio session, Jacobson was struck by how much the process had both revolutionized and reorganized her thinking about how foundations could help transform school governance. “In three hours, I came out with three big ideas for transforming school boards, each tied to a major outcome,” said Jacobson. “We now have the possibility of addressing these issues. I have a very persuasive ordering of what we could do.”

Jacobson said she left the meeting “totally wired.” Back in Delaware, she put the sticky notes from the Innovation Studio session on the wall for a staff meeting. “The conversation started during the Innovation Studio is already playing out with our partner organizations,” said Jacobson. “And school boards are now something we’re going to be looking at as an area of potential focus.”

**Other GFE Member ‘Clients’  
for the Innovation Studios**

“How might we” questions lead us to “...a magic place where minds meet, where things are not the same to all who see them, where meanings are fluid.”

Dr. Sheldon H. White  
Developmental Psychologist



**William and Flora Hewlett Foundation**  
Christopher Shearer

**Question**

How might grantmakers fund direct-to-student technology-based learning activities at scale (thousands of classrooms, tens of thousands of students) in light of current issues related to school infrastructure, governance, etc.?

**Primary Pathway**

Delivering on the promise of digital media (No. 5)

The Hewlett Foundation believes that a major issue in grantmaking practice is how to focus innovation investing on direct-to-student solutions—requiring only a light interface with teachers and limited demands on school IT infrastructure—rather than expecting new models to have to transform teachers as well. Given this belief, what specific strategies might foundations pursue to fund development of direct-to-student technology-based learning activities? How should new designs take into account the role of teachers? How should they take into account demands on school infrastructure capability?

**Panasonic Foundation**  
Scott Thompson

**Question**

How might our partnerships with school systems develop to increase the likelihood that *all* students are prepared to reinvent a rapidly globalizing world?

**Primary Pathway**

Delivering on the promise of digital media (No. 5)

Just as the content and practice of K-12 education must be transformed, so must the Panasonic Partnership Program if it is to achieve its mission.

The foundation wants to put laptops in the hands of all students and teachers in five schools in each of four districts, transforming the system at all levels—from boardroom to classroom—to engage students through personalized learning. But with an annual budget of \$1.4 million, the Panasonic Foundation cannot infuse technology into school systems on its own. Given the imperative for changing the content practices of K-12 education, and given the foundation’s limited resources, what changes in the Panasonic Partnership Program’s focus, content, and approach would increase its leverage and have the likelihood of better preparing *all* students for the rapidly globalizing world they will be reinventing?

**Lumina Foundation**  
Susan Johnson

**Question**

How might we deeply understand the needs of students seeking to bring about significant change in higher education as we seek to increase the number of Americans with a credential or degree to 60 percent by 2025?

**Primary Pathway**

Prototyping and/or scaling new models of learning (No. 3)

The Lumina Foundation’s “Big Goal” is to increase the proportion of Americans with high-quality degrees and credentials to 60 percent by the year 2025. At the time of the Detroit meeting, Lumina was gearing up to begin a new exploratory grantmaking initiative called “Student Voice.” The initiative aims to develop, support, and nurture the ability of post-secondary students to advocate for their own educational needs. How might Lumina gain traction around its efforts to empower post-secondary students to evaluate the quality and value of their own post-secondary education? What tools do students need to ask the right questions about their education? And what funding approaches might have the greatest impact?



**Nellie Mae Education Foundation**  
Nicholas Donohue

**Question**

How do we adopt flexible, adaptive practices as an organization in order to promote publicly supported systems change in education (e.g., school district innovation, messaging to build public will)?

**Primary Pathway**

Fostering public will for new kinds of learning and new learning outcomes (No. 9)

The Nellie Mae Education Foundation recently launched a multi-year, multifaceted agenda to stimulate transformative change in public education systems across New England. How will Nellie Mae support the appropriate transformation of school districts as it seeks to transform the schools that define them? Specifically, how can the foundation support and/or provoke rapid prototyping of practice development processes as well as the redevelopment of district management and governance structures to transform the system into one aligned with SCL? What are the implications for the foundation in terms of how it uses its resources—money, time, staff, etc.—if it is to promote and model the flexibility and “innovation” that it is asking its candidate schools and districts to achieve?

**Jaquelin Hume Foundation**  
Gisèle Huff

**Question**

How might we leverage the strengths of grantees to ensure the integration of technology into the learning experience for all America’s children?

**Primary Pathway**

Delivering on the promise of digital media (No. 5)

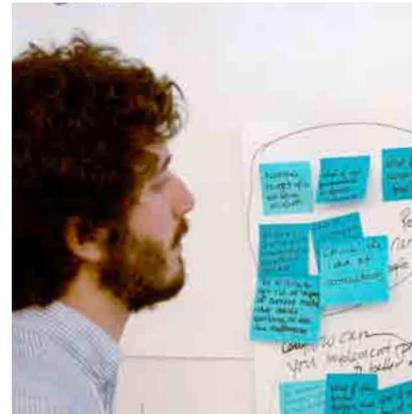
Jaquelin Hume Foundation believes that we must maximize grantmakers’ potential—and that of our grantees—to help schools become digitally enabled in order to transform education to meet 21st-century challenges. In doing so, foundations will need to make vital changes to their grantmaking practices, including funding public policy and PR organizations in addition to direct service providers and encouraging greater collaboration and networking among their grantees. This will likely take many foundations into territory that is not normally their focus. How might grantmakers think more expansively—and collectively—about their strategies for bringing the vision of digital learning to life? How do we achieve our purposes to make digital learning a part of the solution?

## Reflections

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Dorothy Jacobson from the Rodel Foundation of Delaware was not the only “client” who found greater-than-expected value in the Innovation Studio work. For nearly everyone, the experience of opening up their own strategic challenges to a small group of peers was refreshing and deeply constructive. “We have hired consultants to give us advice and support. But this peer-to-peer process was a reminder of how important it is to be surrounded by people with good, relevant experience” said Nicholas Donohue of the Nellie Mae Education Foundation. “People helping each other is definitely an underplayed resource.” Donohue plans to use his Studio output in his foundation’s work, also saying that the experience “impacted me as a CEO in ways that are showing up informally.”

“Going in, I was thinking much smaller than the suggestions people gave to me,” said Lumina Foundation’s Susan Johnson. During the group brainstorm, one participant suggested that funding groups of grantees that are fostering student advocacy rather than one grantee at a time might give her better traction, and someone else threw out the idea of guerrilla marketing at the student level. Johnson hadn’t yet thought of either of these ideas. “The exercise provided me with some exciting options,” Johnson said. “I don’t think the conversation would have gone the same way if it had taken place within my organization.”



While Gisèle Huff has been part of joint funding collaborations among foundations and has created collaborations on her own, “I’ve never been involved in an exercise where my colleagues actually took on the function of consultants and helped me work through my problems,” she said. “It forced me to enunciate what my aims and my challenges were to people who understand the business. And I walked away with something valuable: a model that I could use in order to achieve my ends.”

For Huff, insights from her Innovation Studio session have now prompted her to steer her work to transform digital learning in an entirely different direction. “It became clear during the exercise that you can’t transform digital learning just by working with charter schools, which operate as standalones,” said Huff. Her group’s idea? Try driving that transformation at the district level. “It’s a total departure for us,” said Huff. “We’re in the school choice space and most of our grantmaking is around policy. We’ve never put toes into public schools. But [our Studio work] made me receptive to the idea. It became clear to me that this is something I should pursue further.” In fact, Huff is currently reviewing proposals in this area.

# Looking Forward: Collective Action for Collective Impact

## A Call for an Education Philanthropy Innovation Lab

### The Idea Marketplace

The convening ended with a final collective exercise, dubbed the Idea Marketplace, specifically designed to elicit creative ideas about how to continue this work going forward. What would it look like if grantmakers committed to funding and working together—not episodically but in a concerted way? How might education funders formalize their shared determination to work differently in service of radically different outcomes, and what would that require? To seed the conversation we asked participants the following questions we believe are foundational to continuing this critical effort.

- What kind of physical and/or virtual space will we need?
- How will we work?
- What will our rhythm of engagement be?
- How will we assess progress?
- How will we fund this work?
- What roles are critical?
- What will we work on together?

Using these questions as their guide, participants broke into groups, each brainstorming a design concept and tagging its key features. Through a weighted individual voting process, participants then indicated their support for the various ideas taking shape. Looking across that idea landscape, many commonalities jumped out:

### Both Physical and Virtual Spaces

There was nearly unanimous support for the development of a physical and virtual “home” for the continuation of this work—a place for grantmakers to continue learning about the process of collaborative innovation, put that process to work in support of the 10 pathways, and identify high-potential new models. Participants agreed that this new space must offer:

- Staffing to support continued work on and in the “10 Pathways” framework
- Process design, facilitation, and logistical support
- Regular group gatherings and peer-to-peer workshops
- Rapid documentation and communication
- Learning journeys/site visits to imaginative learning models
- A venue for the pitching and development of new models
- Access to experience and expertise outside grantmaking and outside education

### Online Features Should Include

- Webinars
- Newsfeeds and/or listservs that cultivate and support idea sharing
- A web-based innovation toolkit
- Access to the Monitor Institute strategy landscape tool
- A virtual helpdesk like the one offered by Grantmakers for Effective Organizations

### A Communications Plan

Participants emphasized the need to communicate—and measure progress toward—a shared vision of a transformed learning system. This will require:

- Pooled funds to support communication of the shared vision
- Venues for communicating that vision, e.g., TED conference
- An integrated public awareness campaign
- Visible champions or “ambassadors” for the changes we envision
- State-by-state indicators of innovation and a means by which to track progress across states

### Commitment to the 10 Pathways

Many in the group advocated for deepened commitment to the 10 pathways investment framework as an infrastructure for cooperation, asking for the following:

- A physical and virtual innovation incubator for the pathways work
- Public champions for each pathway
- Illustrations that bring the pathways—and the goals for each—vividly to life
- A public accord and call to action around the 10 pathways
- Milestones and metrics for each
- A public commitment by all education grantmakers to include at least one of the pathways in their investment strategies

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- A regular reporting schedule on progress toward milestones
- An annual conference (like the Aspen Ideas Festival) based on the framework that highlights exemplars and proof points and enables grantmakers to share stories
- A map of investments and progress toward goals
- Definitions of “Education Innovation 3.0,” informed by both funders and experts from other fields

#### An Innovation Clearinghouse

Participants also emphasized the need for transparency about investments along the 10 pathways in order to speed knowledge sharing and breakthrough innovation, suggesting that we launch a virtual innovation data “clearinghouse” at the 2012 GFE national conference. The clearinghouse could:

- Publicize logic models behind our investments and share results to date
- Allow grantmakers to reach one another with questions and ideas
- Include a typology of partners and networking access for different levels of engagement
- Organize joint funding and a mechanism for hosting “pitches” for innovative models. It was suggested that GFE members pool funds to support the unfunded but promising i3 applicants, possibly via a public request for proposal or via a tie to the i3 Foundation Registry.

#### The “Future of Learning” Lab: Funding and implementation

Participants generally agreed that the field needs a future-oriented innovation lab in which innovation studios are used as the means to address problems of education grantmaking practice. Potential funding models for the Innovation Lab include:

- A small pool of major sponsors
- Sliding scale and/or inexpensive membership fees
- Fees for services or for attendance at individual convenings

#### Next Steps

GFE now has three Innovation Series member briefings under its belt. As the series has progressed, participants have expressed a growing sense that incremental solutions—and lone pursuits—will be insufficient to meet the evolving needs of future learners. Through the process of “learning by doing,” we have demonstrated to ourselves that cooperation and collective action among our grantmaking peers creates new strategies and opportunities that would otherwise not have arisen (or would have taken far longer to arrive at). All seem to agree that creating greater alignment and coordination among funders working to advance the next generation of learning will dramatically increase philanthropy’s collective impact.

Beyond field-building and deeper cooperation, however, the innovation series has consistently stimulated introspection for individual grantmakers. Keen to build their own capacities to lead, stimulate and practice the core skills of innovation, these grantmakers are passionate about getting further—faster—to improve outcomes for all students, particularly those who are often last in line to experience transformative new technologies and learning environments. Success will depend in great part on the commitment foundations make to evolving the practice of grantmaking itself to model (and, indeed, to incent) systemic, student-centered innovation.

GFE looks forward to continuing this series and, broadly speaking, to holding up the strategies and practices that will help ensure America’s learners are prepared for college and career today, and tomorrow. For more information about how to become engaged in next steps, please contact GFE’s program staff.

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