When, why and how do learning partnerships add value?

Exploratory study by Itad, in partnership with Porticus

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Executive summary

What are learning partnerships?

Learning partnerships are a collaboration that supports strategic learning, that is, reflection, adaptation, and continuous improvement. Partnerships are structured according to their purpose (what is the objective of learning?), participants (who is involved in learning and who is the learning for?), and set-up (how is the partnership structured?). Many learning partnerships are multi-functional, combining several purposes and participants.

Why the shift towards learning partnerships?

Learning partnerships represent a paradigm shift away from traditional monitoring and evaluation (M&E). They lead us toward the intention to more closely connect learning and decision-making, support complex and systemic change processes where learning and adaptation are key, and collaboratively bolster the skills and capacity of philanthropy staff and partners. Learning partnerships align better with the values, approaches to grant making, structures, and power dynamics of certain philanthropies.

What value can learning partnerships add?

Learning partnerships add value by bringing structure and flexibility to portfolio-level synthesis and learning, strengthening partners' monitoring, evaluation and learning (MEL) skills and processes, involving an external voice, and supporting adaptation in fluid and changing contexts.

What does a learning partnership need to succeed?

Learning partnerships need strategic enablers, including trust and collaborative relationships, a strong learning culture and buy-in, shared purpose and clear expectations, long-term engagement and a space for goals to emerge. They also require operational enablers like clear and empowered focal points within the philanthropy, time, and resources to collaborate and build trust, and the right mix of strategic, relational and technical skills.

What are some key learning partnerships types?

We identified four main archetypes of learning partnerships, which are not mutually exclusive and sometimes evolve from one to the other. Many learning partnerships combine elements of two or more of them. The Practice Partner archetype delivers practical, flexible learning support to partners, the Philanthropy Sense-maker synthesises learning to guide philanthropy strategy and direction, the Network Builder convenes diverse actors to reflect and connect across a system, and the Programme Navigator bridges partner learning and philanthropy big-picture learning across a programme.

How could philanthropies choose a type?

We suggest a set of steps and questions to spark a discussion on how to establish learning partnerships. In general, a Practice Partner archetype helps when you want to shift the power to partners and build a philanthropy's capacity. Philanthropy Sense-maker is preferable when you need a big picture overview to guide decisions. Network Builder forges connections that can support systems change down the road. You may choose Programme Navigator when you want to support both partners and a philanthropy to chart a course through complexity.

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About the research

Acknowledgements

Objectives of the research

1. Understand the **current state of play** of learning partnerships in philanthropy

2. Understand **when, why** and **how** learning partnerships add value or fail to add value

3. Provide **practical guidance** on how best to design and deliver learning partnerships

Approach, methods, data sources

Approach

We adopted a qualitative and case-based approach, drawing on participatory action research principles. We drew on the UN Partnership Accelerator framework and The MSP Guide to multi-stakeholder partnerships to articulate key 'building blocks' of learning partnerships, which informed our inquiry.

Data collection methods

Primary: 43 In-depth interviews with Porticus partners, external experts, and philanthropy staff, 1 focus group discussion, and 2 participatory sense-making workshops. More than half of the interviews focused on five Porticus learning partnership case studies (described on the next page).

Secondary: Review of publicly available literature and internal documents available via snowballing, and light-touch review of available programme documents.

Analysis and synthesis methods

Qualitative coding and three participatory workshops with the research team, philanthropies and Porticus staff, and five learning partners.

Five Porticus learning partnerships were particularly useful for this research:

	Building Future Generations	Ignite – Labour Pathways	Regenerative Agriculture	Enabling a More Synodal Church	A Revitalised and Synodal Church in Latin America
Challenge	Children in Displacement and Children on the Margin	People on the Move	Regenerative Agriculture (formerly Fair Transition)	Building a Vital Church	Building a Vital Church
Description	Brings together work on refugee education, seeking holistic learning beyond the traditional focus on access, literacy and numeracy	Participatory grant-making, focused on modern slavery and migration	Encouraging agricultural approaches that promote biodiversity, strengthen farming communities and sustain fair transitions	Fostering a more inclusive and participatory Church, following Pope Francis' call for greater communication and co-operation	Supporting the synodal process in the Catholic Church (2021–24), collaborating with major Catholic organisations in Latin America
Duration	2023–2029	2022–2027	2023–2026	2022–2027	2021–2027
# partners	Approx. 70 partners across eight countries and four regions	40–50 partners across multiple countries and regions	20+ partners	n/a	4 main partners
Facilitator	6-partner consortium led by Triple Line	Lighthouse Partnership	Dalberg	PPOL	ZIGLA
Activities	Co-creation of MEL strategy and tools; supporting partner, cross-country and global learning	Supporting MEL strategy and grantee capacity; synthesising global evidence; regional convening	Sector trend analysis; targeted data collection and analysis; team and regional learning workshops	Creating MEL tools; managing learning agenda; thought partnership	Co-creation of theory of change, MEL tools and evaluation rubrics; learning facilitation; yearly convenings

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What are learning partnerships?
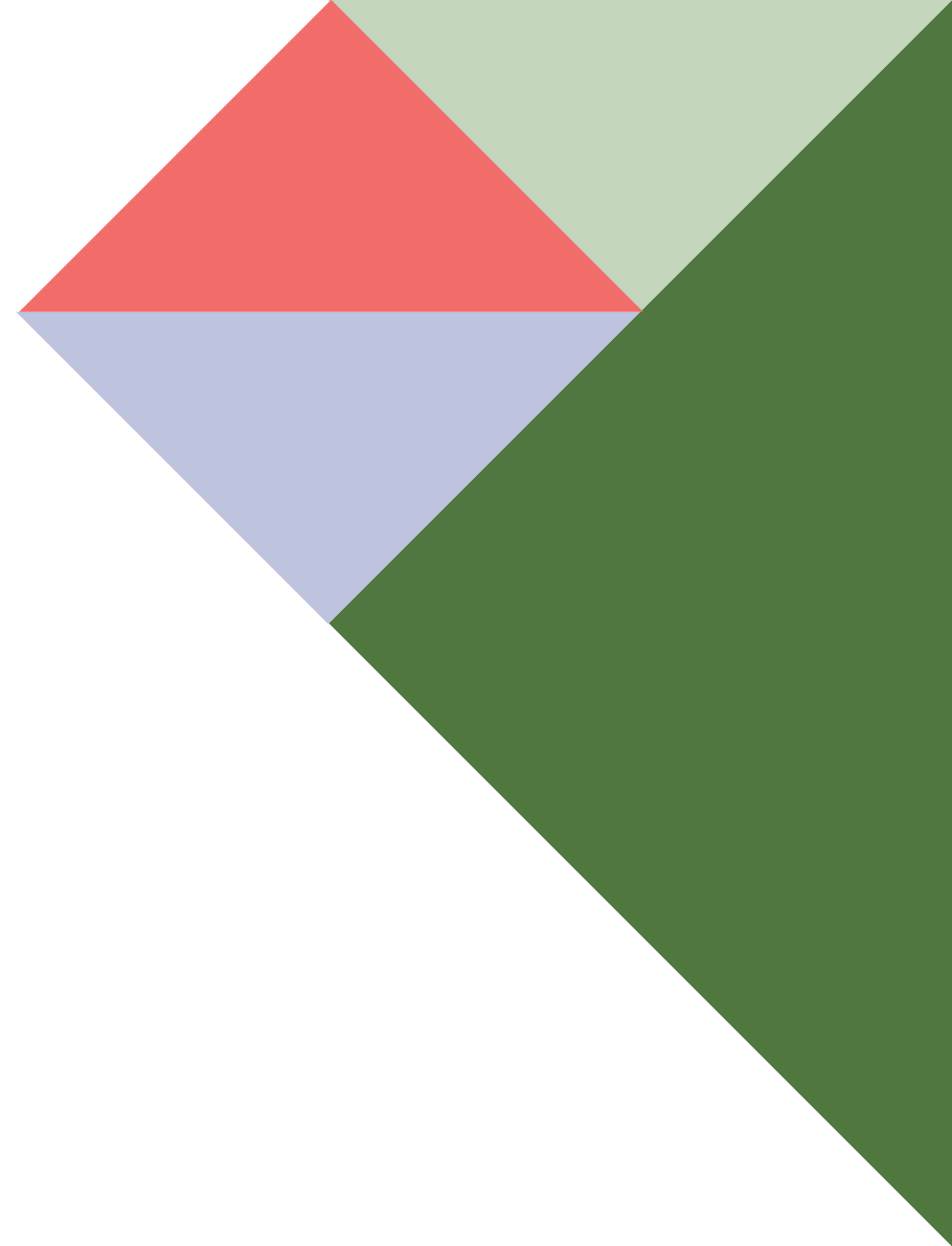
What is a 'learning partnership'? Our starting definition.

Our initial literature review found that 'learning partnership' refers to a wide variety of different models and relationships. We developed a starting definition to set clear boundaries for the research.

> " Collaborative partnerships between a foundation, its grantees and an external learning expert, where the learning expert supports the philanthropy and grantees to make sense of evidence through activities that support collective learning and adaptation"

Involve a three-way partnership between philanthropies, grantees and an external learning expert.

Are funded by philanthropy.

Have an explicit focus on drawing on evidence (including but not limited to monitoring and evaluation evidence) to inform learning.

Are focused on supporting internal learning to inform adaptation to programme activities.

Are relatively long-term.

Our definition didn't always resonate. Philanthropies have very different understandings of learning partnerships and are using them in different ways.

There is significant **uncertainty, ambiguity and lack of clarity** around how learning partnerships are understood and used by philanthropies.

There is broad consensus that **no single model works universally**, either within or across philanthropies.

Our starting definition is too narrow: for example, not all learning partnerships involve a three-way relationship with an external facilitator; or involve drawing on evidence for the purposes of adaptation.

A useful broader definition is:

A collaboration that supports strategic learning

Where strategic learning encompasses learning for the purposes of reflection, adaptation, and/or continuous improvement.

Philanthropies are grappling with an array of complex choices and internal realities when deciding how to build and manage a learning partnership

We have identified **three key dimensions** of learning partnerships that shine a light on some of the decisions that need to be made.

Each learning partnership is unique, structured along three key dimensions

1. Purpose
Why a learning partnership?

Supporting reflection

As a valuable goal in itself.

Supporting adaptation and decision-making

At different levels within a programme / philanthropy. A key rule of thumb is that learning needs to happen at the level where the decisions you want to influence are made.

Generating and synthesising evidence

Across a programme or portfolio. This often involves developing MEL frameworks and summarising MEL outputs.

Supporting community-building, network building or field-building

To break down silos, create and deepen relationships, encourage collaboration or establish a community of practice.

Strengthening partner capacity

In MEL, learning or cross-cutting concepts (e.g. systems change).

2. Participants
Who is involved and who is the learning for?

Partner organisations

Either within or across programmes / portfolios.

Philanthropy staff

At different levels: e.g. senior leadership, portfolio or programme managers, regional or country teams, and / or the evidence and learning team.

Sector stakeholders

Beyond the philanthropy: including communities, civil society, NGOs, other philanthropies, government, and / or academia.

3. Set-up
How is the partnership structured?

Internal vs external facilitator

May be facilitated by internal teams, or an external individual(s) / organisation / consortium, or 'self-managed' by participants.

Time-bound vs open-ended

May be linked to a specific programme, strategy or decision-making process over a fixed time-period, or more open-ended and continuous.

Formal vs informal

Level of participation may be optional based on participant needs and interests, or a mandatory part of a programme or grant agreement.

Setting up a learning partnership involves a constellation of choices across these three dimensions.

Many learning partnerships are multi-functional, combining several purposes and participants. The Archetypes illustrate how these choices can play out in practice.

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Philanthropies are each guided by a unique set of values, approaches and structures. Learning partnerships align better with some than others.

Learning partnerships align best with particular values, mental models, approaches to grant- and decision-making, and organisational structures. Certain portfolios and programmes also lend themselves more readily to a learning partnership model.

Values, mindsets, mental models

- **Approach to partner reporting and accountability.** Where a philanthropy is embracing a trust-based approach, decolonisation and/or participatory grant-making, learning partnerships can help shift the focus away from accountability. Where there is a strong emphasis on centralised reporting and standard indicators, this may limit space for partner learning.

- **'Predictable' vs 'unpredictable' view of the world.** Where a philanthropy sees change as inherently unpredictable, learning partnerships can help support iterative decision-making. This is more challenging if the philanthropy sees strategy as highly predictable and favours top down-planning.

Approach to grant-making

- **Nature of funded initiatives.** Learning partnerships can help philanthropies and partners navigate complex systems, move into uncharted areas and pursue emergent outcomes. Network building partnerships can help build coalitions and support advocacy goals.

- **Level of flexibility, responsiveness and risk appetite.** Learning partnerships are well suited to flexible grant-making where appetite to risk and experimentation is high, or where goals evolve responsively at grassroots level. Learning partnerships may be less helpful where desired outcomes are more specific, tangible and time-bound.

Structure, power dynamics, approach to decision-making

- **Centralised vs decentralised decision making.** This influences how much autonomy teams have to set and shape strategies. Where decision-making is highly centralised, this may limit the impact a learning partnership can have.

- **Decision-making structures and timelines.** Where strategy is developed along set timeframes, learning partnerships need to be well-timed to influence strategic decisions.

- **Internal MEL structures, resources and hierarchies.** Where there is a well-resourced evidence / MEL team, learning partnerships may be managed internally. The management of larger-scale, more ambitious learning partnerships may be externally commissioned.

These dimensions draw from the Rockefeller Philanthropy Advisors' Philanthropy Framework and Operating Archetypes

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Why the shift towards learning partnerships?

Learning partnerships represent a paradigm shift away from 'traditional' M&E

Philanthropies often see **traditional monitoring** as:

> **time-consuming**

> focused on **centralised indicators and rigid reporting**

> **transactional and accountability-focused**, aimed at serving funders' interests and appetite for knowledge

> concerned with scrutinising **individual projects** and grantees rather than portfolios or systems

> **taking data at face value** without asking what it means, why, and what it implies

And **traditional evaluation** is associated with:

> one-off (or sporadic) **static** exercises

> carried out by **external** or independent providers

> whose findings **don't always support** decision-making

Learning partnerships emerge as an attempt to...

> build **a long-term, organic, collaborative, trust-based relationship** between funders and grantees

> support grantees to define their **own measures** of success

> look across **portfolios** of grantees and take a **systemic, often collective, approach to change**

> offer deeper **contextual awareness, equity, and responsiveness**

> prioritise **continuous learning**, by using information to adapt and take action to accelerate change

> position funders, grantees, and sometimes learning partners and communities as **collaborators towards a shared goal**

As part of this paradigm shift, learning partnerships are used in three main ways:

1 To help philanthropies and partners reflect deeply and use learning to inform action.

They can support learning at the level where decisions are made, e.g. at executive, portfolio or programme level. This helps evidence and insights directly inform strategy pivots, resourcing decisions and operational shifts.

This can reduce the gap between evidence production and actionable, timely insights.

2 **To grapple with and tackle complex, systemic issues.**

The journey towards systems change requires **drawing lessons from the evidence** and being open to learning and adapting.
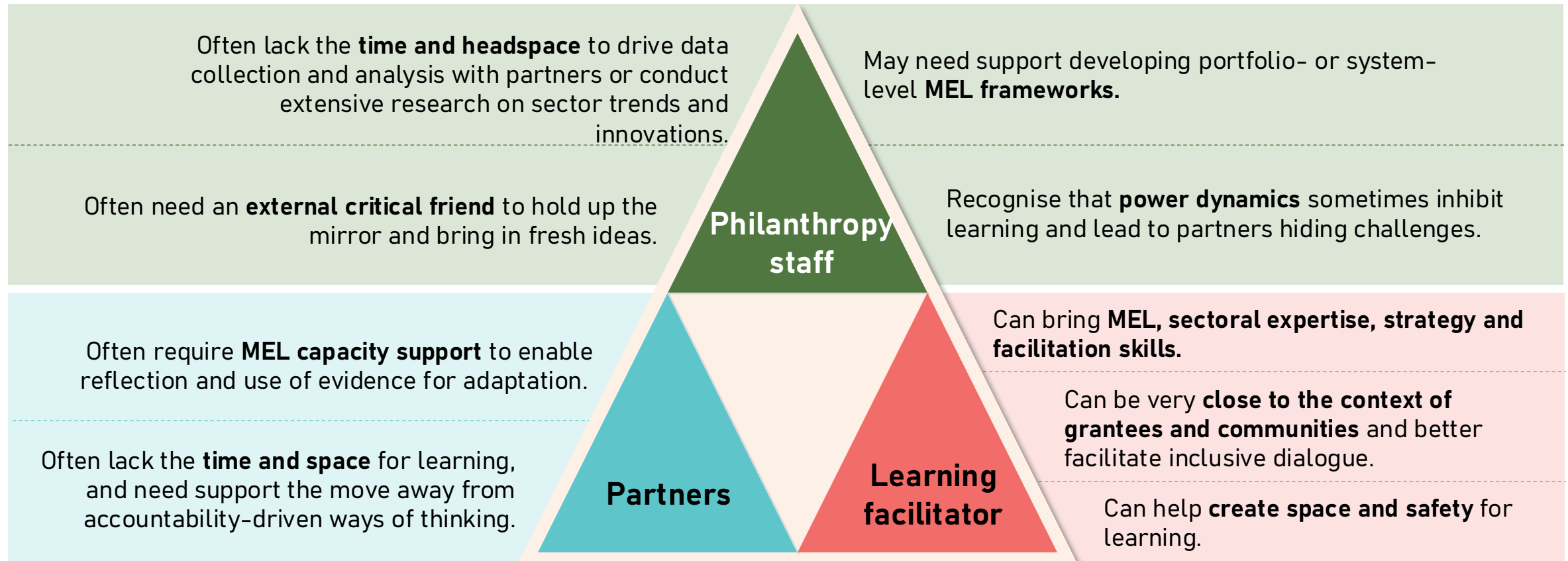
Learning partnerships are suited to **fields that involve non-linear results**, high uncertainty, and **qualitative, emergent and context-specific outcomes.**

They support funders to position themselves as **long-term partners and actors in the system**, pursuing a shared vision of change alongside partners and communities.

To bring in additional expertise to support and make space for learning.

Often lack the **time and headspace** to drive data collection and analysis with partners or conduct extensive research on sector trends and innovations.

May need support developing portfolio- or system-level **MEL frameworks.**

Often need an **external critical friend** to hold up the mirror and bring in fresh ideas.

Recognise that **power dynamics** sometimes inhibit learning and lead to partners hiding challenges.

Philanthropy staff

Can bring **MEL, sectoral expertise, strategy and facilitation skills.**

Often require **MEL capacity support** to enable reflection and use of evidence for adaptation.

Can be very **close to the context of grantees and communities** and better facilitate inclusive dialogue.

Often lack the **time and space** for learning, and need support the move away from accountability-driven ways of thinking.

Partners

Learning facilitator

Can help **create space and safety** for learning.

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## What value can learning partnerships add?

According to the **UN Partnership Accelerator**, successful partnerships create value for each partner while delivering more impact than any single actor could alone.

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It has been an amazing learning experience: the benefits hugely outweigh the costs. We couldn't have done this in a traditional partnership.

Philanthropy informant

Learning partnerships can add value by:
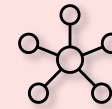
Bringing structure and flexibility to portfolio-level synthesis and learning

Strengthening partners' MEL skills and processes

Involving an external voice

Supporting adaptation in fluid and changing contexts

Bringing both structure and flexibility to portfolio-level synthesis and learning

Learning partnerships often involve collaborative exercises to frame goals and activities and build a shared vision of change. This might involve co-creating theories of change, learning questions and/or MEL frameworks and tools. Co-creation and bespoke tools can help ensure MEL serves the context-specific learning needs of partners and avoid burdening them with top-down standardised reporting, while still ensuring a level of consistency that supports synthesis across a portfolio.

This adds value for the philanthropy, which often requires a high-level overview of evidence across a portfolio to guide strategy and decisions. Carefully designed tools and frameworks can generate strategic, portfolio-level insights while retaining flexibility for partners.

Learning partnerships can also help bring structure and unity to a portfolio. Theory of change processes can help partners clarify their role in the system and portfolio. Facilitated convenings can surface commonalities, differences, and opportunities across partners, sparking discussions on what should be prioritised, building connections between partners, and informing strategic decisions at all levels.

Co-creating

One of the learning partnership cases explored in this research **started with a theory of change co-creation exercise**, which brought together the philanthropy and many local and regional organisations. Partners found this process useful to achieve a shared view of the system and shared priorities, clarifying what was within and outside the scope of the programme's strategy.

In another of our case studies, the learning supplier facilitated an **extensive co-creation process of MEL tools**, which opened more opportunities for grassroots organisations, including refugee organisations, to make their voices heard.

Distilling

Minimising reporting from implementing partners in the context of an open portfolio with emergent results was the focus for another partnership case study. The learning facilitator collaborated with the philanthropy to co-design a one-page reporting tool to capture key outcomes and learnings, designed to be as useful and rapid as possible for partners. This generated an overview of the context and a starting point for strategic discussions.

Strengthening partners' MEL skills and processes

Learning partnerships often involve demand-driven MEL capacity strengthening with partners.

Enhanced or refined MEL skills at the partner level

Allows partners to more meaningfully participate in the **co-creation of portfolio-level tools and approaches.**
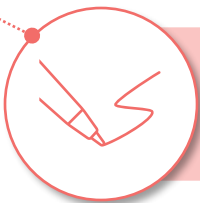
Products created by the learning partner better reflect the **realities and context** of partners.

Brings **community voices and lived experience** to programme decision-making.

Fosters the adoption of a **learning mindset.**

Helps inform **more effective decisions on the ground.**

Results in new tools and confidence that **support reporting to other funders and funding applications.**

Helps **strengthen and sustain** partner organisations beyond the lifetime of the grant.

Bespoke tools and contextualised support

In one of our case studies, the learning facilitator **developed bespoke reporting tools and provided context-specific support to partners** as part of the philanthropy's shift away from centralised reporting.

Involving an external voice

External learning facilitators can add value for both the philanthropy and its partners.

External learning facilitators can bring in fresh ideas and help partners overcome the risk of group-think. If the learning facilitator is empowered and trusted to ask hard questions, challenge assumptions, and help make sense of complexity, their role is described as "holding up the mirror", providing an "objective thought partnership" or "sounding board", and "playing devil's advocate".

An external learning facilitator can help navigate the power dynamics that are often involved in funder-partner interactions. These dynamics can prevent partners from participating in genuine learning discussions that require reflecting on challenges and failures. Learning facilitator teams often involve local focal points who bring contextual expertise, experience working with communities, and shared values.

Frequent, evidence-based dialogue

In one of our partnership case studies, the learning facilitator has frequent dialogue and **exchanges with the funder to facilitate sense-making based on data shared by partners**. This dialogue is grounded in the MEL expertise of the partner alongside their understanding of the sector and the values they share with grantees and the funder.

In another case explored by this research, the learning partnership focuses on a learning agenda defined by the philanthropy. The learning facilitator collects **targeted primary data with partners** (thus removing top-down MEL requirements for implementing partners) and performs **sector trend analysis**, providing the philanthropy team with the knowledge required to make adaptive funding decisions. The learning facilitator also brings in fresh ideas from the wider sector in targeted areas of the portfolio.

In many of the partnerships explored in this research, partners described the importance of the learning facilitator **understanding the sectoral, geographic and linguistic context of partners**. In one case, grassroots organisation receiving funding from the philanthropy perceived the learning facilitators as **part of the same background**, which helped collaboration and open learning.

> [The external learning facilitator] is outside the power dynamics of the foundation and can say: "we saw this, you said you held this value, but it didn't happen here." They hold up that mirror and hold you accountable for the things you aspire to do.
>
> *Philanthropy informant*

Supporting adaptation in fluid and changing contexts

A learning partnership can help philanthropies and partners respond flexibly and adaptively when working to promote systems change, as well as deal with contextual challenges and disruption.

Programmes or portfolios that tackle complex systems are particularly suitable for learning partnerships because they involve non-linear results, high levels of uncertainty, and constantly shifting contexts. The ability to respond flexibly is especially important when working in challenging environments.

> The biggest support was the [philanthropy] and the [learning facilitator] understanding the context of what we went through last year. We had a report due two months later, but we received an email saying, "We know the context is difficult, there is an ongoing conflict, you don't have to submit a report". That was a massive relief in two ways: the real material aspect of not having to use time to do it at that point and feeling understood and supported.
> – *Partner informant*

> We know all the characteristics of systems means you have to be adaptive. One-off evaluations won't necessarily help, as there is lots of sense-making required. The way change happens is emergent… and understanding dynamics is hard with evaluation alone. So, [philanthropies] need a set of learning and sense-making that comes along with it.
> – *MEL Partner*

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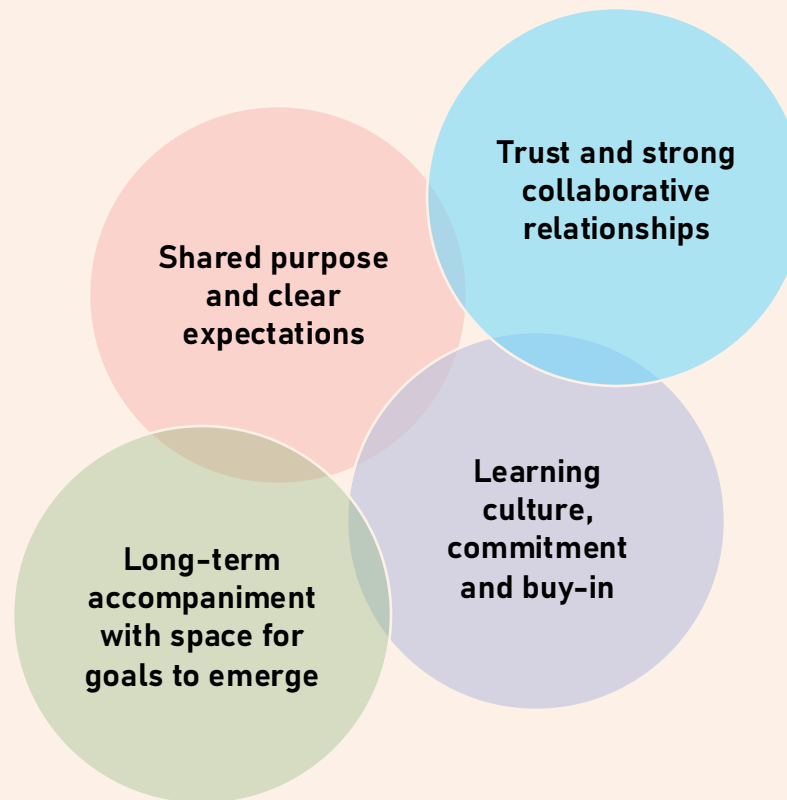## What does a learning partnership need to succeed?
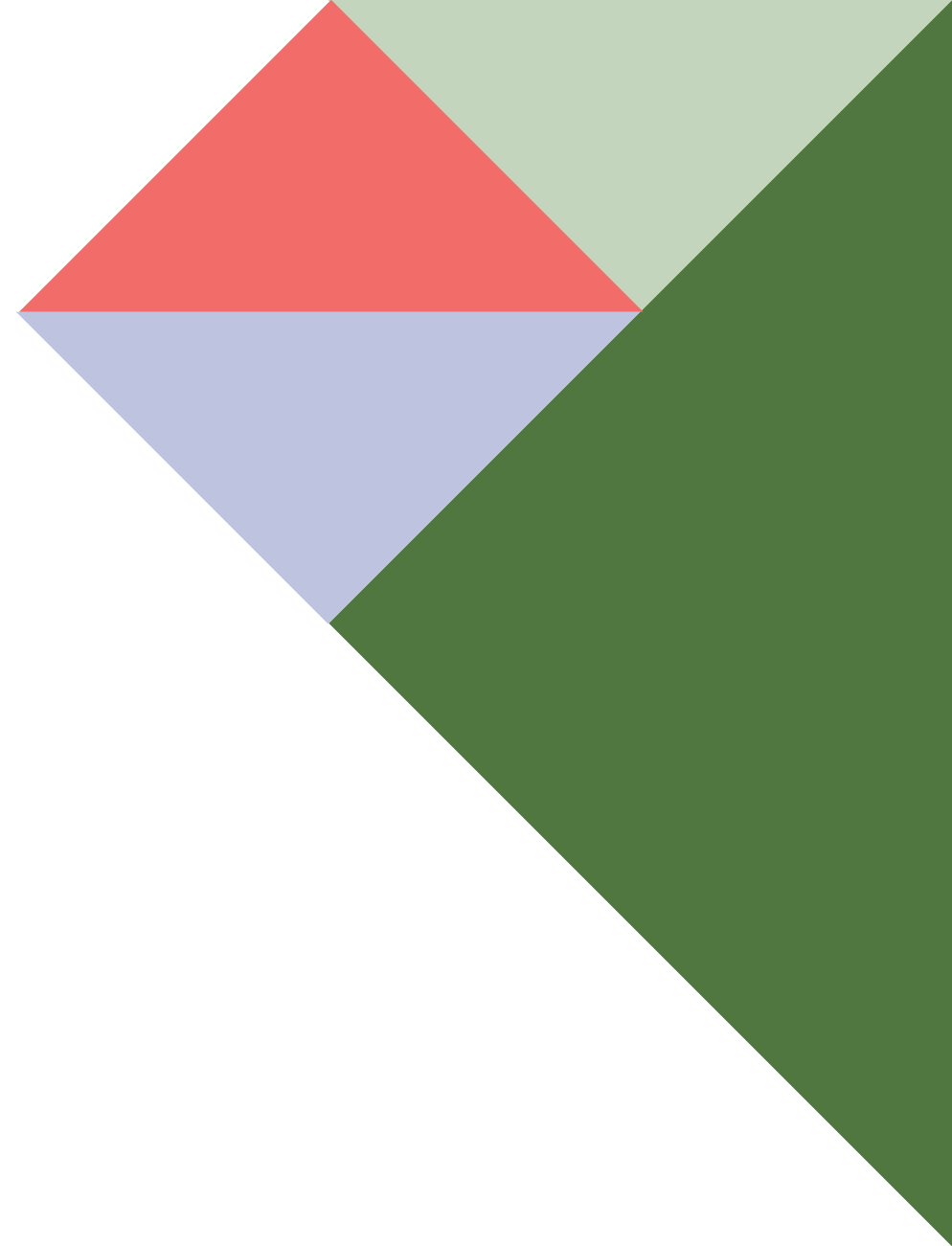
Learning partnerships need the right strategic and operational conditions to set them up for success

Our key informants reinforced messages from the literature around what makes a learning partnership successful. We found four 'strategic enablers' and three 'operational enablers' that are important in virtually all cases. The Archetypes contextualise these enablers to specific types of learning partnership.

Strategic enablers

The strategic scaffolding that supports a learning partnership to be credible, useful and adaptive.

- Trust and strong collaborative relationships
- Shared purpose and clear expectations
- Learning culture, commitment and buy-in
- Long-term accompaniment with space for goals to emerge

Operational enablers

The practical resources, processes and capacities required to implement and sustain a learning partnership.

- Clear, empowered focal point(s) within the philanthropy
- The right mix of relational, strategic and technical skills
- Time and resources to collaborate and build trust

*These enablers draw from the UN Partnership Accelerator Building Blocks of effective partnerships*

Strategic enablers

The strategic scaffolding that supports a learning partnership to be credible, useful and adaptive

Clarity of purpose. This **is** the key starting point for a successful learning partnership. Clarity isn't always easy to achieve and can require time to emerge, as there are often a myriad of priorities that aren't immediately explicit. Many learning partnerships combine several of the purposes outlined earlier, but without always being clear on which are most important.

Recognition that philanthropy and partner learning interests, priorities and needs will fundamentally differ. Even when philanthropies and partners have the same goals, they will use learning in different ways at different levels. Trying to prioritise both within a single partnership is challenging (although not impossible: see Programme Navigator archetype) and can stretch resources too thin.

All participants seeing value in the partnership. Learning is time-consuming and needs to feel worth it to busy partners, to avoid disengagement and extractive relationships. To avoid confusion and tensions, philanthropies need to lay the groundwork with partners, ensuring they understand the purpose of the partnership and the learning facilitator's role. This can take time, especially when partners are used to accountability-focussed MEL.

Shared purpose and clear expectations

Learning culture, commitment and buy-in
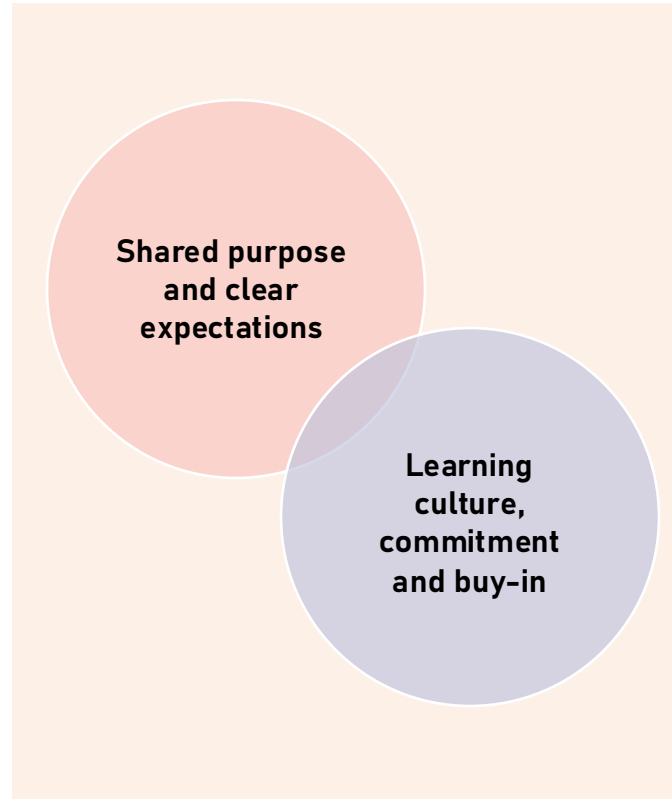
Senior engagement and buy-in within the philanthropy. This includes leadership mindsets that value learning over compliance. It's important to be mindful of incentives: programme teams may not naturally prioritise learning unless supported by senior leaders and/or a committed evidence and learning team.

Flexibility and safety of participants to engage in authentic learning. This requires actively managing power asymmetries (external facilitators can help with this) and creating spaces where open engagement is possible (e.g. ensuring funding decisions don't hinge on the outcomes of learning discussions). If learning is intended to lead to adaptation, this needs to be enabled by flexible management processes.

> ❝ The things we are interested [in] as a foundation are not the things that excite a refugee-led organisation"
>
> *– Philanthropy informant*

> ❝ [It is important to have the attitude of] "we are all learners, we all have expertise to offer, this is a complex environment, we are learning our way through this together."
>
> *– Philanthropy informant*

Strategic enablers

The strategic scaffolding that supports a learning partnership to be credible, useful and adaptive

Trust between the learning facilitator and participants. Trust is built through time—a long-term engagement, with time to clarify goals and build relationships—as well as through the facilitator having the right mix of skills and running activities that bring people together (in person where possible).

Strong, integrated relationships. Where facilitators are external this requires striking a balance between them being embedded enough to understand the team, their needs and how decisions are made, without being so integrated they risk losing objectivity.

Bringing the learning facilitator in early. This allows them to be part of shaping activities and avoids the risk that participants see them as an outsider imposing new expectations and processes once work has already begun.

Long-term accompaniment with space for goals to emerge

Trust and strong collaborative relationships
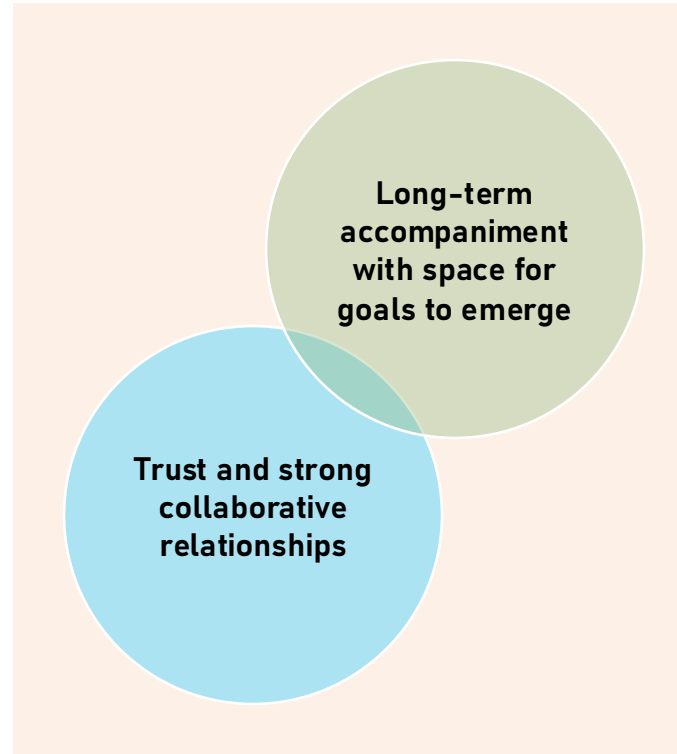
Learning facilitator playing an 'accompaniment' role. Often described as a 'critical friend', the facilitator provides flexible support that goes beyond clearly defined deliverables and is viewed as a core part of the team. This arrangement is usually long-term (e.g. multi-year) which supports deeper engagement and understanding. It helps when external learning facilitators have a genuine commitment to the cause and view themselves as part of the mission rather than purely an external contractor.

Emergent goals within a clear overarching vision. Successful learning facilitators work with participants to chart a path and find a way through complexity together, achieving clarity along the way while managing turbulence and challenges. However, it's important to have a clear overarching vision and boundaries around what is and isn't included—otherwise facilitators can suffer from a lack of clear direction and risk underdelivering.

❝ Part of the work involves investing in the relationship and regularly assessing it"

– Philanthropy informant

❝ [The learning partnership] brought intentionality, structure and a flexibility in thinking about this emerging process which didn't have a clear structure"

– Philanthropy informant

Operational enablers

The practical resources, processes and capacities required to implement and sustain a learning partnership

A clear focal point with a strong vision and sufficient political capital: to drive strategic direction, broker priorities, manage expectations and surface needs. This is especially essential for external facilitators, where the focal point acts as a 'broker' who connects the facilitator to relevant people within philanthropy and partner networks. Without this, it can be challenging for the facilitator to deliver value. Clear and regular mechanisms for collaboration (e.g. platforms, meetings) are essential.

Support from multiple individuals or a broader team. The focal point(s) may sit within the programme team or the evidence and learning team, or both. However, relying on a single focal point can be risky—it can destabilise the learning partnership if they leave or if the scope of work changes. Ideally any single focal point will be supported by a wider team who are bought into the learning goals.

Clear, empowered focal point(s) within the philanthropy

Time and resources to collaborate and build trust
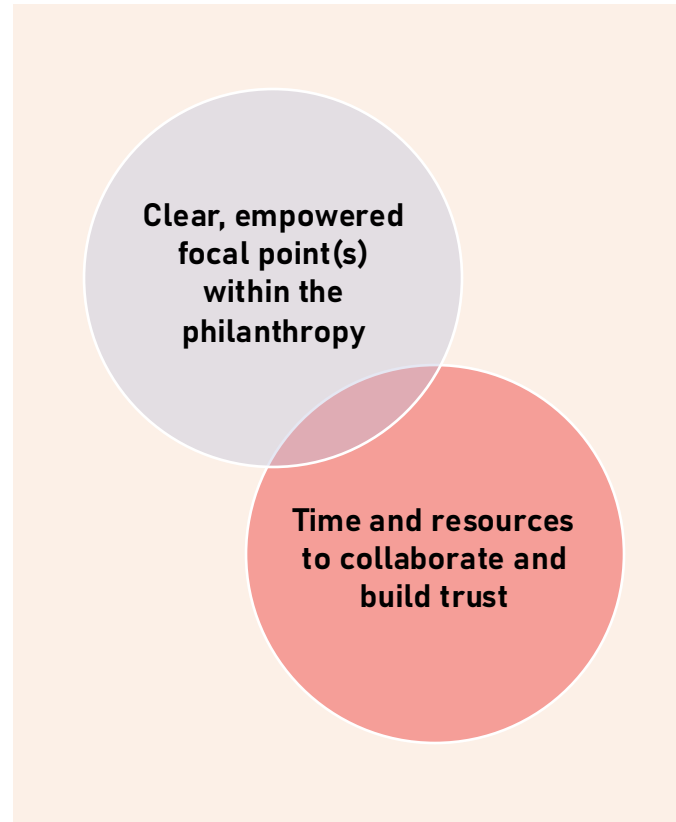
Sufficient set-up time for the partnership, enabling trust and relationships to form, the facilitator to develop a strong understanding of context, and clear goals to emerge. It can take time to understand needs and what participants can absorb at a given moment. Where partnerships are formed too quickly without fully developed strategies, this can undermine meaningful collaboration down the line.

Balancing set-up time with the need to generate immediate, tangible benefits to participants so they see the value, e.g. through working together on something tangible like a theory of change or focussing on network building initially before moving onto more strategic goals.

Acknowledgement that learning takes time. Rushed processes and light touch engagement can lead to the contortion of findings. If partners are engaged, they need sufficient time and bandwidth to participate in workshops and sense-making activities—ideally paid, or this risks placing an additional burden on them.

Sufficient resources to achieve the purpose(s), and to support meaningful engagement. Budgets should reflect the scale of the partnership: where there are multiple purposes and participants, this needs to be resourced. A common challenge is insufficient budget for the facilitator to invest in one-to-one relationships with partners which is essential to establishing trust.

> " You might have an amazing learning partnership, but if you don't quickly show how it can be used…[partners] lose interest quickly"
>
> *– MEL partner*

Operational enablers

The practical resources, processes and capacities required to implement and sustain a learning partnership

Learning facilitators need a broad range of skills and capabilities. Finding all of them in one person or organisation is unrealistic (like 'finding a unicorn') so the key is to identify what skills are most needed in a given context, and will be most valued by participants. Getting the mix of skills and experience wrong can risk undermining participant trust and willingness to engage.

Foundational soft skills are required by virtually all learning facilitator teams:

- **Resilience and adaptability**, allowing the facilitator to effectively steer the partnership as it evolves.
- Strong **emotional intelligence and people skills**, in order to build rapport among diverse participants. Vulnerability and openness help foster trust.
- **Communication skills** are also essential to success.

The right mix of relational, strategic and technical skills
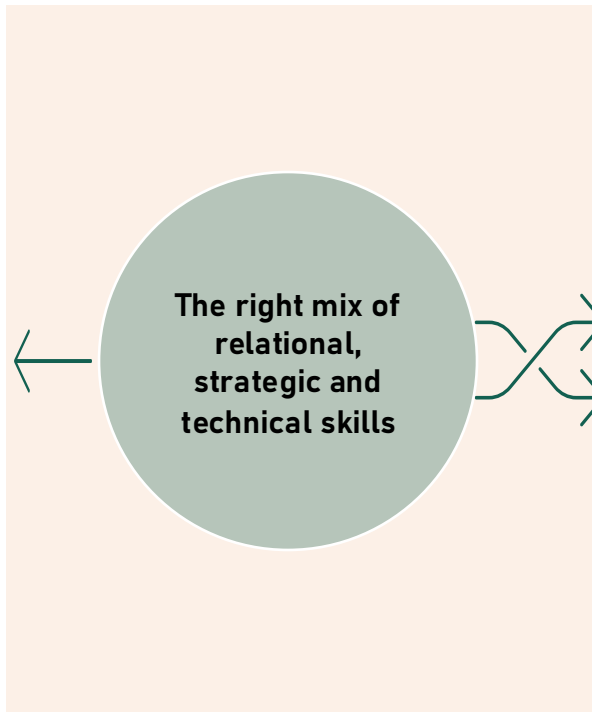
On top of these soft skills, learning facilitator teams need some combination of five technical skillsets. The 'right' mix depends on the context and purpose. This is often achieved through a consortium, with gaps plugged through bringing in ad hoc consultancy support or drawing on philanthropy staff.

1. **Facilitation skills:** to coordinate a learning process that includes multiple voices and views, creates a safe space, supports sense-making and takes account of power dynamics.

2. **Strategic learning skills**: important where the purpose is to drive decisions and adaptation. Includes the ability to ask strategic questions that stimulate deeper reflection and support action, bring in new insights and help 'join the dots.' Expertise in complexity and systems thinking helps.

3. **MEL skills:** important where capacity building and evidence generation / synthesis are key goals. Includes the ability to bring in MEL frameworks, tools and typologies and facilitate theory of change processes.

4. **Sectoral expertise:** this gives confidence to partners and philanthropy staff and enables the facilitator to bring insights from outside, surface trends, play a 'challenge role' to programme thinking, and facilitate technical sense-making.

5. **Contextual expertise:** deep understanding of partner contexts, including culture, political economy, drivers and constraints. In some cases being from the community or having lived experience is highly valued and builds trust.

> "It's a delicate balance…if the required capabilities aren't available, it's better to forgo certain activities than risk harm"
>
> *– Philanthropy informant*

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Learning partnership archetypes
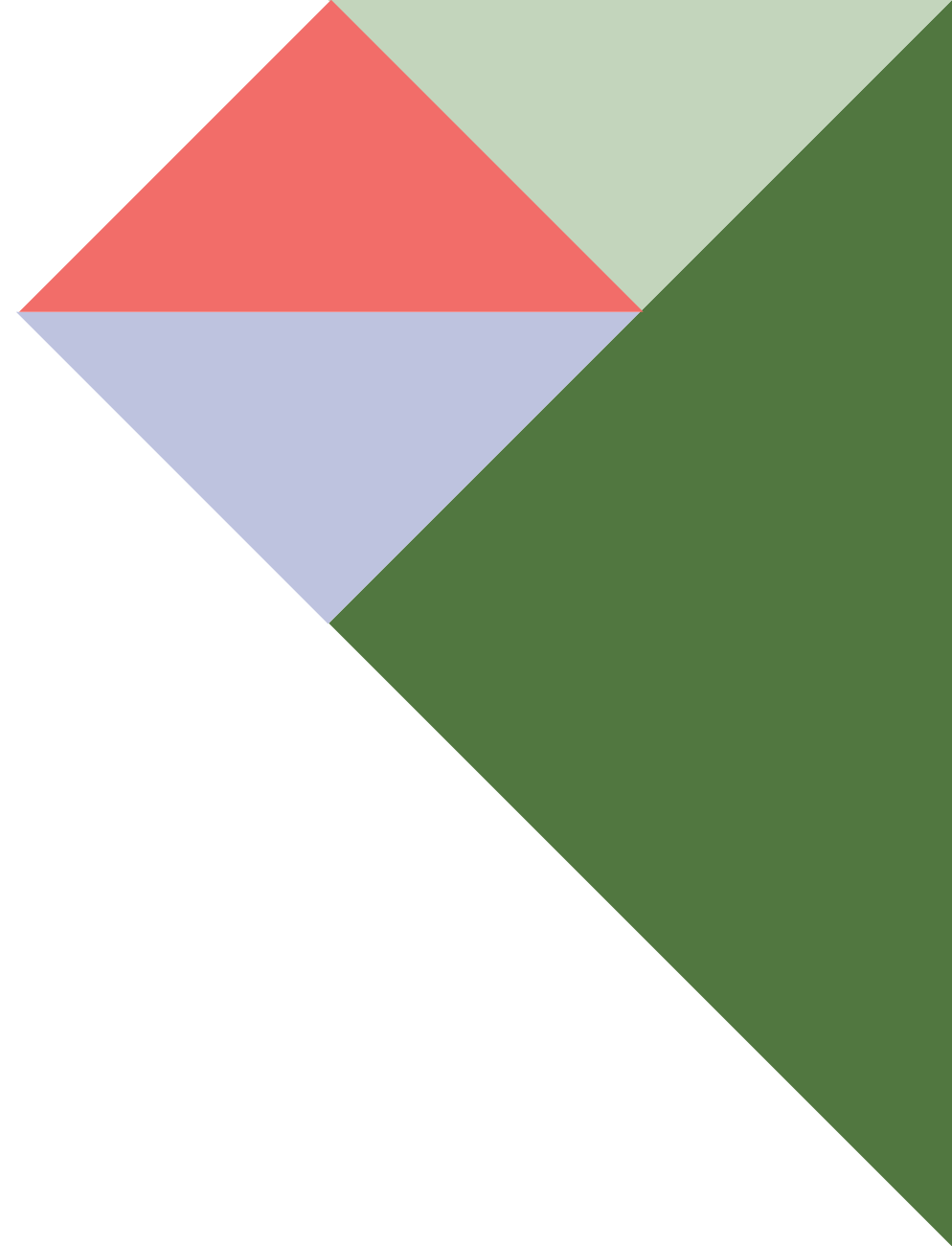
Learning partnership archetypes

Four models of learning partnership

Setting up a learning partnership involves a constellation of choices about purpose, participants, and set up (see Section 2). To illustrate how these choices play out in practice, we have summarised them into four Learning Partnership Archetypes.

The archetypes are intended to help philanthropies work out what type of learning partnership makes most sense for their context, and the enablers and risks to consider.

They are not mutually exclusive and many real-life learning partnerships are a combination of two or more archetypes. However, the bigger the scope, the greater the challenges and the higher the risk that the learning partnership will be spread too thin.

Some learning partnerships evolve from one archetype to another over time as needs, capacities and priorities shift.

1

Practice partner

Delivers practical, flexible learning support to partners

2

Philanthropy sense-maker

Facilitates strategic learning to guide philanthropy strategy and direction

3

Network builder

Convenes diverse actors to reflect and connect across a system

4

Programme navigator

Bridges partner learning and big-picture decisions across a programme

1 Practice partner
Delivers practical, flexible learning support to partners

> The duration of the partnership was so important to building trust. That trust was key to us being able to deliver value. The more we worked together the more we understood each other and the more we could tailor evidence and learning."
> – MEL partner

Purpose

Support partner **reflection**, and/or

Help partners **generate context-specific insights to support learning and adaptation**, and/or

Strengthen partner **capacity** to learn and engage with evidence.

Participants

Focused primarily at the **partner level.**

It is important to be clear whether the priority is learning *for* individual organisations, or learning *between* organisations (e.g. to support collective decisions). Partners may not automatically see value in learning collectively from one another, for example if they are very diverse or don't view themselves as part of a unified programme.

Set-up

External facilitators are often engaged, given the time required to work in a hands-on, one-to-one way with partners, and the importance of language / contextual skills.

Partnerships may be **time-bound and formal** (e.g. linked to a specific programme), or **open-ended and informal** (an ongoing process of support).

Key enablers

Strategic

- Partners need to **see value and feel safety in learning.** Where there is uncertainty around funding this is likely to close down partner motivation to learn as the focus is on survival.

Operational

- Partners and facilitator need sufficient **time and resources** to engage one-to-one in learning activities and build relationships and trust. This will take longer when partners are highly diverse and capacity is varied.

- **Hands on, flexible, pragmatic support** is highly valued by partners and builds trust, confidence and buy-in. This support will likely look very different between partners and should focus on meeting them where they are rather than imposing generic training or tools.

- The learning facilitator(s) should ideally be **locally based**, often requiring a well-chosen team. **Language skills** are essential, as is **a deep understanding of context**. In certain sectors **sectoral expertise** is crucial—potentially even more important than facilitation skills— to support credibility and build trust with partners.

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2 — Philanthropy sense-maker
Facilitates strategic learning to guide philanthropy strategy & direction

Purpose

Collect and/or synthesise evidence and generate learning across a programme / portfolio, and/or

Support philanthropy-level decision making, and/or

Strengthen strategic learning processes.

Participants

Focused primarily at the **philanthropy level.**

May involve **philanthropy staff at different levels and in different teams**, e.g. senior leadership, portfolio / challenge leads, programme managers, regional or country teams, evidence and learning team.

Set-up

Facilitator may be **internal or external.** While internal actors bring continuity and deep understanding of the philanthropy, external actors can bring fresh perspectives, new ideas and an independent voice that can help navigate power dynamics.

Generally aligned to **specific programmes / portfolios / decision-making windows or opportunities** (e.g. a strategy process).

Key enablers

Strategic

- Clear **alignment with relevant timeframes** is important, along with clarity on which decision-points are being targeted and **buy-in from the leaders responsible**.

- Working at the philanthropy level typically comes at the cost of flexibility and bespoke support for partners—so it's important to ensure **partners also benefit from the process** and are able, willing and resourced to contribute, e.g. through co-creation of MEL systems or providing (lighter touch / less bespoke) MEL support. This helps alleviate the risk that this type of partnership might feel 'top-down' to the partners.

Operational

- It is essential that philanthropy staff have the **time to engage effectively**—if key stakeholders don't have sufficient bandwidth to collaborate, the partnership may fail.

- If an external facilitator is engaged, they need to have a **clear focal point who has sufficient political capital to shape strategic direction-setting.** Without this the learning partnership can be seen as dispensable.

- The learning facilitator needs **a strong understanding of the philanthropy**, its intricacies and culture, and **credibility** with philanthropy stakeholders. **Strategic learning skills** are particularly important to ensure the right questions are posed.

3 Network builder

Convenes diverse actors to reflect and connect across a system

Purpose

Bringing together actors (within or across programmes, portfolios, sectors) to **break down silos, create and deepen relationships, encourage collaboration or establish a community of practice.**

Often **no direct requirement to collaborate or make decisions**: networks are about forging connections that may lay the foundations for collaboration down the line.

Participants

Sector, philanthropy and/or partner stakeholders.

Can encompass a range of **diverse organisations with different mandates or entry points**, but who share a common goal.

Set-up

Often **open-ended** and **informal**, with participation more fluid and low expectations of collaboration.

Often **facilitated internally** or **self-managed.**

Key enablers

Strategic

- It is important that **participants see the relevance to their practice**, as there are many competing offers and opportunities to engage in networks. It's common to see initial interest that drops off down the line.

Operational

- While some networks are self-organised, **successful networks often have someone playing a 'backbone role'**, handling facilitation, logistics and knowledge management. This may be the grant manager or a participant. Self-management doesn't always work effectively, as significant time and effort is required.

- The learning facilitator ideally needs **sector knowledge and connections**, with both credibility and convening power. A facilitator who can navigate dynamics between participants, e.g. competition between partners within a programme, is especially desirable.

Programme navigator
Bridges partner learning & big-picture decisions across a programme

> " We don't feel like we have to go into real contextual detail all the time. We can go straight to the point about the work we do because there's a good understanding about the work."
> – *Partner informant*

Purpose

Combines elements of archetypes 1, 2 and 3:

Strengthening partner MEL capacity, and/or **supporting partners to reflect, learn and adapt**, plus

Bringing partners together to forge connections and generate cross-programme learning, plus

Synthesising insights across a programme to help shape philanthropy decisions and strategic direction

Participants

Programme partners *and* **philanthropy stakeholders** (usually programme / portfolio managers and the evidence team).

Set-up

The learning facilitator is often **external**, given the broad scope of work.

The partnership is usually **time-bound**, linked to a specific programme.

Participation is generally **formal**, with partners expected to engage in learning activities.

Key enablers

Strategic

- It is important for partners to feel confident that **learning is the genuine priority**. This can be undermined if there is still a strong accountability focus (e.g. via reporting requirements).

- Partners need to understand the **role of the facilitator**. It can cause confusion and hinder relationships when partners don't understand the distinction between the facilitator and the philanthropy, or how and when to call on the facilitator for support.

- This combination of archetypes requires a **balancing act between the needs of partners and the needs of the philanthropy.** This may involve sequencing activities over time (e.g. starting with partner reflection and capacity building, then evolving to cross-programme learning).
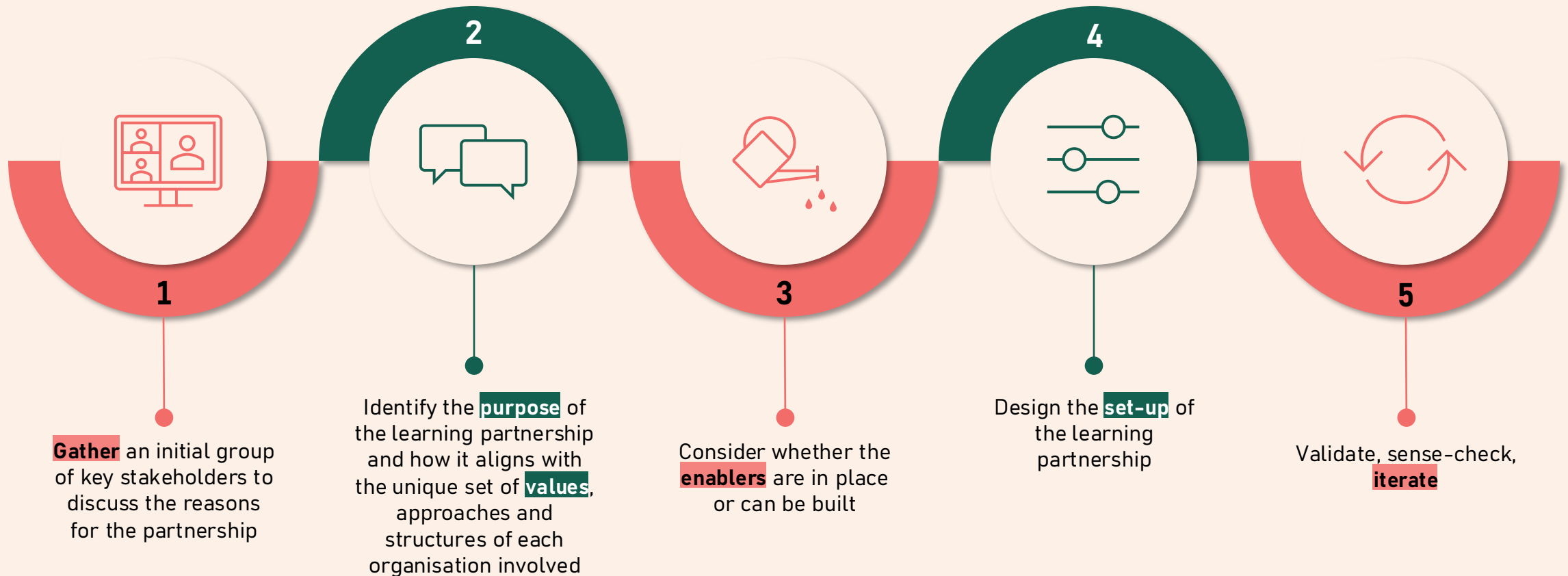
Operational

- Where external facilitators are engaged, a '**double-docking point**' into both the programme team (who can ensure programme ownership) and the evidence and learning team (who can play a MEL technical support and translation role) can be helpful.

- It can be challenging to provide bespoke one-to-one support when partners have very different needs and capacities. In this case, a **triaged approach to capacity strengthening** may be required.

- Facilitators require **a diverse skillset**, given the multitude of purposes and partners. In some cases, sector knowledge and reputation is important to gain partner trust, while in others facilitation and strategic learning skills are essential—e.g. for programmes that are cross-sectoral or in a generative stage. Deep knowledge of both philanthropy and partners is important—often requiring a global core team who holds the philanthropy relationship combined with in-country focal points to build relationships with partners.

07

How could philanthropies choose a learning partnership type?

Suggested steps

The previous sections described considerations for effective learning partnerships and some partnership archetypes. This section suggests steps to translate these insights into effective learning partnerships in philanthropies. While they were created to guide philanthropies in their decisions, they are best operationalised by engaging the other stakeholders who will contribute to the partnership. All the steps involve a set of collaborative and iterative decisions, and they should not be adopted in too linear a way.
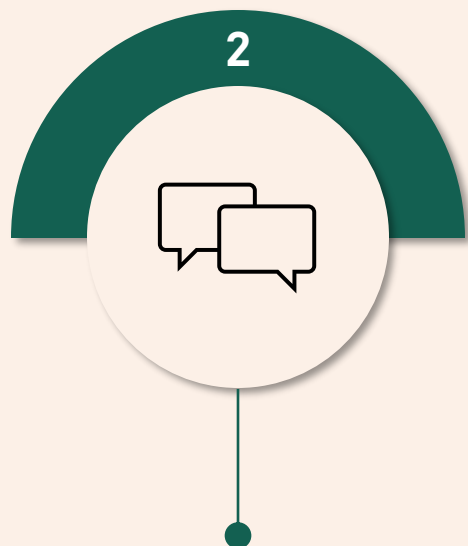
2

4

1

Gather an initial group of key stakeholders to discuss the reasons for the partnership

Identify the **purpose** of the learning partnership and how it aligns with the unique set of **values**, approaches and structures of each organisation involved

3

Consider whether the **enablers** are in place or can be built

Design the **set-up** of the learning partnership

5

Validate, sense-check, **iterate**

1

Gather an initial group of key stakeholders to discuss the reasons for the partnership

The Partnering Initiative and the UN Partnership Accelerator identify the "**imperative to partner**" as the first step of the partnership lifecycle. They define it as "a collective motivation to act towards a shared goal", which may arise from unsuccessful attempts to solve a problem using conventional approaches or from a vision for systemic transformation and collaboration.

This step encourages engaging, informing, and consulting the key stakeholders who will contribute to the partnership's success, such as philanthropies and grantees. For instance, in a case study described by one of our informants, a funder was approached by several partners facing similar challenges in measuring and demonstrating change. The funder brought together key individuals from these organisations to co-develop Terms of Reference for a third-party organisation that could build capacity across both the philanthropy and its partners, and facilitate the co-creation of a set of tools to address these challenges. Within the funder's group, it may be important to involve both members of the programme and the evidence and learning teams (see **operational enablers for Programme Navigator**).

2

Identify the **purpose** of the learning partnership and how it aligns with the unique set of **values**, approaches and structures of each organisation involved

The purpose of learning is a key dimension that shapes a learning partnership. Learning partnerships may aim to support reflection, adaptation and decision–making at various levels, generate and synthesise evidence, foster network–building, or strengthen partner capacity. While these purposes are not mutually exclusive, it is important to note that the broader the learning goals, the greater the resources and capabilities required to deliver them effectively.

The learning purpose should also align with the values, approaches, structures, power dynamics, and decision–making structures and timelines of those involved. For example, if a philanthropy prioritises accountability–focused reporting and holds fixed views on change, a learning partnership centred on adaptation may not fit well within its systems.

This step invites you to use the tools in this document to identify the purpose of the learning partnership:

- **Consider how this purpose aligns with the values, approaches and structures of the organisations involved**, using the categories and resources from page 14.

- **Explore the learning partnership archetypes on the next page** and select the one that best aligns with your purpose and values.

- Note that while having a primary archetype in mind helps ensure clarity and realism, it may be helpful to borrow elements from others. Every partnership is unique, and the archetypes should be used as flexible guides rather than rigid templates.

When might each archetype be most helpful?

1 Practice partner
Delivers practical, flexible learning support to partners

As part of a broader commitment to **investing in and trusting partners**, moving away from extractive relationships and allowing partners to direct how they spend funds.

If partner MEL capacity is low and learning systems lacking, this archetype can **lay the groundwork** for more strategic, cross-programme or systemic learning in future.

2 Philanthropy sense-maker
Facilitates strategic learning to guide philanthropy strategy and direction

When there is a need for a **big picture overview across a portfolio of work** to guide high level decisions.

When there is a desire to **bring learning into strategy processes** or **build learning systems** at the philanthropy level.

3 Network builder
Convenes diverse actors to reflect and connect across a system

To build networks between actors that can **support systems change.**

To forge connections in a low-risk environment—providing spaces where people can come together to reflect **without requirements for consensus or joint delivery**. This can lead on to more formal collaborations in future.

4 Programme navigator
Connects partner learning with big-picture decisions across a programme

To **both support partners and shape the strategic direction of a programme**, helping chart a course through complexity and support programme-wide learning.

May be most suitable **when programmes aren't too big or diverse**, allowing for meaningful and bespoke one-to-one relationships between partners and facilitator.

More likely to succeed when **partners see themselves as part of a unified programme**, which motivates participation in cross-programme learning and evidence generation.

3
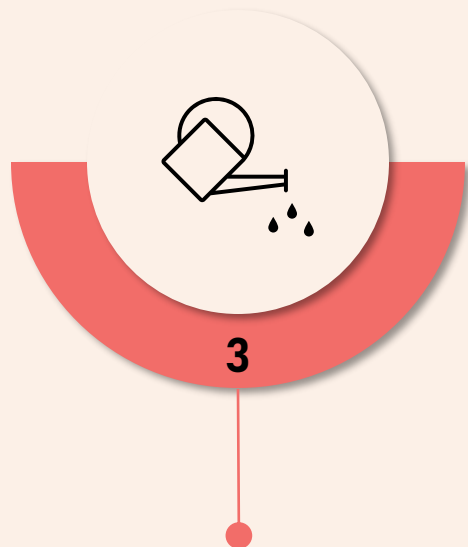
Consider whether the **enablers** are in place or can be built

Learning partnerships require strategic scaffolding to be credible, useful and adaptive. They also need practical resources, processes, and capacities to be implemented and sustained (**Section 5**). For example, a learning partnership designed to give a philanthropy a strategic overview of its portfolio must align its timeline with the philanthropy's decision-making cycles. If an external learning facilitator is involved, they must have a strong understanding of the philanthropy, as well as the credibility and mandate to support sense-making.

This step invites you to reflect on the enablers that will support to the success of your chosen learning partnership archetype. **Ask yourself and the team:**

- What strategic and operational enablers do we already have in place?

- Which enablers could we invest in developing?

- To what extent do the partnership timelines allow to build these conditions?

Use the Strategic and Operational Enablers box for your selected archetype to guide this self-assessment.

4
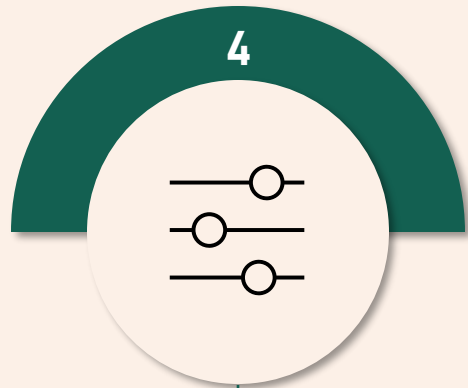
Design the **set-up** of the learning partnership

Once the purpose, values and enablers of a learning partnership are identified, setting it up involves a constellation of choices across several dimensions, including who is involved, the partnership's duration, and its governance.

This step invites you to make decisions across these areas:

- **Use the 'Participants' column** on **page 13** to reflect on who will be involved in learning and who the learning will be for.

- **Use the questions on the next two pages to reflect on other elements of the partnership** set-up. We have used slider buttons to illustrate that choices are not binary; they offer opportunities to find creative and context-specific solutions.

Who facilitates learning?

Internal facilitators (like philanthropy staff or participants themselves)

✓ It can work well if the philanthropy and partners already see themselves as collaborators in the same sector

✗ May result in challenging power dynamics and conflation of 'learner' and 'facilitator' role

✗ May lack MEL and facilitation skills

✗ May have greater time constraints

External learning facilitators

✓ They bring complementary skills and connections

✓ They have time and mandate

✗ They need a set of facilitation, thematic and contextual skills that may be hard to find

Refer to page 19 for the needs and complementary skills of stakeholders, including external learning facilitators.

Who should be the external facilitator?

Established firms with learning and philanthropy-level track record

✓ Deepens previously established and reliable relationships

✗ Narrow playing field

New or emerging organisations

✓ Can bring in new perspectives, views, and networks, often closer to global majority contexts

✓ Equitable playing field

✗ May not have a track record of working across contexts, which may be needed in learning for global portfolios

✗ It may feel risky

Consortia between organisations bridge the pros and cons of these two types of learning facilitators but may require more resources for management.

Portfolio or philanthropy

✓ 'Big picture' overview to guide high-level decisions, for example about resourcing

✗ Often not what is most needed or desired by partners

Programme or intervention

✓ Hands-on, bespoke support to country teams, partners, and communities

✗ Granular insights that don't directly inform higher-level decisions for the philanthropy

Learning needs to happen at the level where decisions you want to influence are made (see dimension on page 13). More levels of learning require more evidence and facilitation resources (as explained on the next page).

What evidence should learning be based on?

Reporting models that reflect what the funder needs to know

- ✓ Easily synthesised cross-portfolio insights address a philanthropy's learning needs
- ✗ May not reflect partners' learning needs
- ✗ May not reflect partners' learning needs

Programme or intervention

- ✓ Can provide hands-on, bespoke support to country teams and partners
- ✗ Can result in granular insights that don't directly inform higher-level decisions

Partner organisations and philanthropies can align on shared learning questions, focusing data collection and reporting efforts accordingly. If the evidence needs are broad, adequate resources should be allocated to meet them.

How long should the learning partnership be?

Open-ended

- ✓ Flexibility for emergent learning, innovation, and evolving priorities
- ✓ Allows for trust, relationship, and capacity building over time
- ✓ Flexible resource commitment
- ✗ Risk of mission drift

Time-bound

- ✓ Linked to a specific programme, strategy cycle, or decision-making process
- ✓ Clear expectations and easier planning
- ✓ Builds in closure or transition
- ✗ Limited adaptability or continuity
- ✗ Pressure to demonstrate short-term results

Learning partnership timelines should align with their learning goals and enablers. Long-term partnerships can include time-bound learning milestones or questions that are collaboratively revisited or updated as the context evolves.

How formal should activities be?

Optional participation

- ✓ Respect for autonomy, choice based on relevance and interest
- ✓ Tailored engagement and reduced burden
- ✗ Likely uneven participation, more engagement from better-resourced partners and fragmented learning
- ✗ Limited data for funders

Required by programme agreements

- ✓ Captures comprehensive learning and surfaces voices from a broader range of actors
- ✓ Increases alignment and network
- ✗ Capacity strain for less resourced organisations
- ✗ Risk of tokenism
- ✗ Participation may feel transactional or forced

Learning partnerships can involve a mix of optional and mandatory requirements, and this should be reflected in partners' resourcing.

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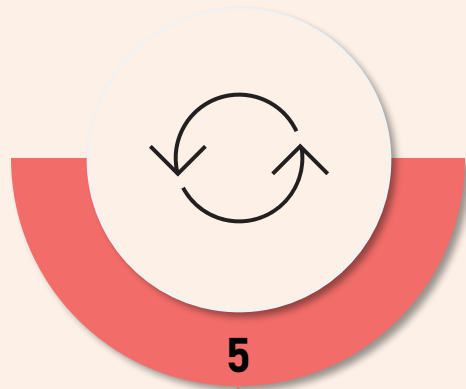
Validate, sense-check,
iterate

The choices you have made should be sense checked and validated with all stakeholders involved in the partnership, as well as their wider organisations. This may include other teams within the philanthropy, senior leadership from grantee organisations, the communities engaged, and other influential actors in the sector. Internal discussions should consider the values, cultures, approaches, and decision-making structures of both the funder (as highlighted on **page 14**) and all other stakeholders. **Review and iteration are also crucial in learning partnerships.** Progress towards shared goals and stakeholder satisfaction should be periodically reviewed to inform course correction and adaptation.

Finally, partnerships evolve. For example, a Practice Partner archetype that has invested heavily in building grantee capacity may transition into a Philanthropy Sense-maker or Network builder archetype focusing on systems change or informing higher-level decisions. Partnerships that achieve their goals may also close or reconfigure with new partners or revised objectives.

This step invites you to:

- **Validate your partnership design with all relevant stakeholders.**

- **Use tools such to assess value, risk, and implications for each organisation**, such as **tool 3 in the SDG Partnership Guidebook**.

- **Plan for regular review and adaptation** to ensure the partnership remains relevant and effective.

- **Consider how your partnership might evolve over time**, and what conditions would support that transition.

08

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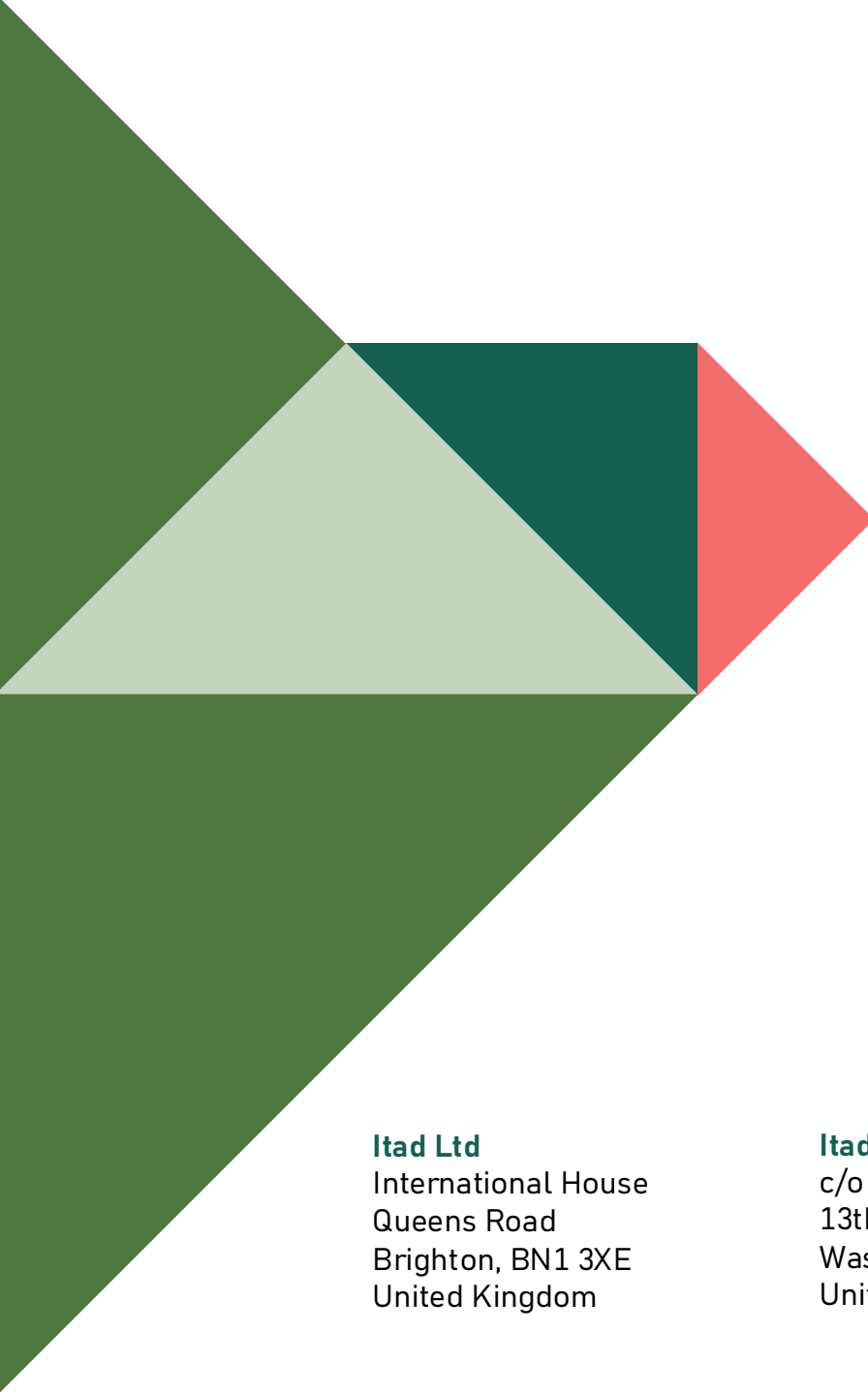
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