

# Embrace Knowledge Opportunities for an Effective Grant Strategy

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Approximately 15 years ago, I started a position in philanthropy with the title of Knowledge Development Officer. At the time, the position didn't exist in salary surveys. It was challenging to articulate what the work really was and why it mattered in the field of grantmaking. We re-crafted the job description multiple times and were always on the look-out for even a few tools and resources.

Fast forward to today and "knowledge work" (as a big umbrella for many different tools, methods and activities) has expanded exponentially and its definition has shifted. A recent Blackbaud survey indicates that grants professionals believe that knowledge work goes far beyond compliance.

### Knowledge Work Job Functions in Grantmaking.

**scientific affairs, analytics, research, community research, measurement and evaluation, research and development, capacity building, learning and reporting, information, partnerships, advocacy evaluation, database operations, data systems, evaluation and learning, success measurement, strategic learning, relations analysis, information systems, learning and engagement, knowledge management, grants and learning, evidence and learning, data standards, assessment and learning, social impact, data management, data visualization, data discovery, innovation, program effectiveness, content management, information technology, research services, knowledge insights**

*Examples of current job functions that exist across the grantmaking field that involve knowledge work, as reported by grantmakers*

Grantmaking takes place in an increasingly complex world, and we are inundated daily with more information and new approaches to philanthropic strategy. Amidst the complexity and strategy buzz, grants professionals need to make the best use of our knowledge work to support the most effective decision making possible for the most equitable change possible.



CHAPTER

# 01

Maximizing  
Knowledge Work

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As philanthropic investments rapidly expand and focus more on equitable social change, there is a growing promise that **philanthropically funded change efforts can contribute to positive social change, strengthen democracy, and deepen our humanity.**

We can maximize the value of our knowledge work to these aspirations by:

- Understanding our history and essence
- Embracing knowledge work as core to equitable change
- Aligning knowledge intimately with effective grantmaking
- Learning how to identify knowledge opportunities specific to our contexts
- Choosing technological solutions consistent with our knowledge approach
- Articulating knowledge success on its own terms.





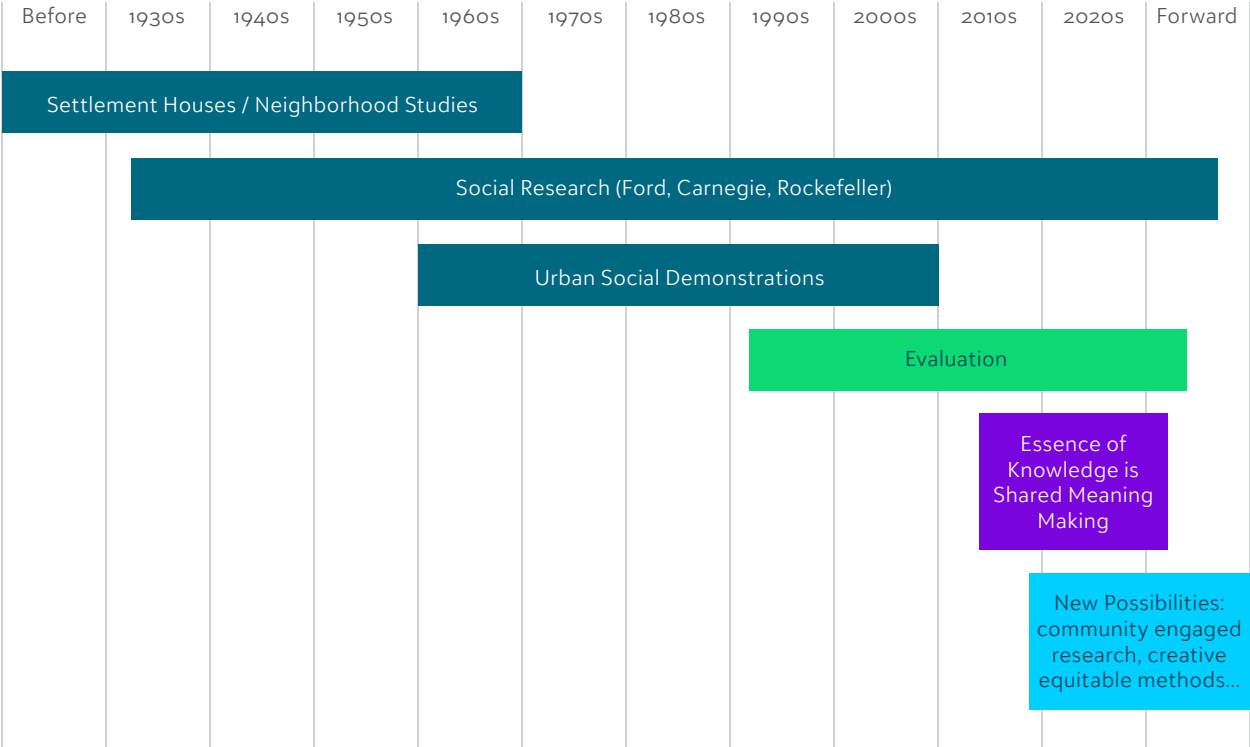
# CHAPTER 02



Starting with  
Shared Meaning  
Making

Knowledge work, mostly in the form of social research, has been part of philanthropy since the very beginning of institutionalized foundation activity. The earliest foundations—e.g. Carnegie, Ford, Rockefeller—came into being during an age of neighborhood studies and anti-poverty efforts. Foundations commissioned social research studies and later began using the studies to demonstrate the success of foundation programming and supports. More recently, and for the past few decades, evaluation (as a process and then a field) has commanded the knowledge space in philanthropy.

### Knowledge Trends



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Throughout this history, social research, even when incorporated into change philanthropy, has been embedded with power structures that are far from equitably envisioned. Many of us have been taught that knowledge is something created outside by others in positions of authority, and that knowledge is to be purchased or consumed. We now can put that belief aside by reclaiming the truth of knowledge as a collective intention and action. At its essence, knowledge is shared meaning making and knowledge work involves many activities for encouraging shared meaning making.





CHAPTER

# 03

Embracing Knowledge  
Work for Equitable  
Change

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Each of us brings a different role and context to our work. However, knowledge work overall can support equity intentions in various scenarios. If we imagine the idea of alchemy where a process can increase the value of the existing situation, then knowledge work is a way to increase an equity alignment with grant strategy.

## If the current grantmaking processes aren't feeling equity-centered, knowledge work can introduce an equity focus.

This might occur as an organizational decision with knowledge work explicitly incorporated to support that intention. The equitable intention might also emerge from within the knowledge function as part of the practices embedded in the role. Either way, in practice, we can try to:

### **Ask Questions that Go Beyond Compliance**

There is considerable talk about minimizing grantee burden. Some foundations are choosing to reduce data collection. Some are swapping written deliverables for conversations. Others are focusing on trusting relationships and participatory processes rather than lengthy reporting requirements.

### **Engage Grantees In The Knowledge Processes**

We can support equity by inviting grantees and communities into knowledge processes beyond just providing data. We can share power in the key tasks of deciding what questions are important to ask, what data is worth collecting, and whose interpretation of the data informs strategy.

## Amplify Grantee And Community Perspectives

We can maximize foundation knowledge investments by resisting the tendency to treat the foundation (and ourselves) as the central voice in knowledge building. Instead, we can use our positions to increase the volume of multiple perspectives across grantees and communities where we work.

However, there is a big caution here. When funders rely on knowledge work to carry an equity intention for a grant strategy that isn't focused on equity, there needs to be deep consideration of balance. It is easy to add to staff and partner workload by increasing expectations of shared knowledge activity. Even if a knowledge activity is incorporated in the interest of learning, engagement, and power sharing, there is a risk of overburdening colleagues and grantees and even detracting from the community change efforts.

A promising option being incorporated by foundations, small and large, is to create dedicated space for grantee and community shared meaning making. This can happen through collaborative research projects, learning exchanges, or other creative configurations. Dedicating space is important for multiple reasons, including:

- showing that lived experience is valued
- making shared meaning-making visible
- ensuring that participant time in knowledge activities is recognized and compensated

Too often grantee and community time in knowledge activities, such as report writing and site visits, had to be absorbed within program budgets but actually took time away from service in community.







If a grantmaking approach seems unnecessarily restrictive (usually because of past assumptions about how to minimize risk), knowledge work can encourage exploration and creativity if we:

### **Frame Knowledge Work As Generative Or Even Productively Disruptive In Order To Invite Creativity**

When we start to have fun with knowledge work as a shared process, we become more skilled at listening for the many ways that people experience the world around us. When we prioritize creating together, we shift the focus away from capturing or documenting information, and welcome insights that come, not from action, but rather through our action.

### **Expand Methodological Options For Datamaking And Interpretation.**

Broadening the toolkit of knowledge work is a first step to creativity. Methodologies can provide space for art, story, and dance in data collection and interpretation. They can emphasize iterative interpretation rather than linear logic processes. They can even

turn linearity on its head, with approaches that move in a dialectic fashion, from details to whole picture and back again. When asked to demonstrate credibility in creative methodologies, the key is to be systematic and transparent in describing how these processes strengthen both the meaning making and equity.

### **Connect Data To Conversations About The Future.**

Visioning is usually claimed as part of grant strategy and not appropriate to knowledge work. Even though it may seem counter-intuitive, knowledge processes that encourage a future orientation are very valuable for surfacing values, assumptions, and existing beliefs that may actually be inhibiting positive change right now. We can review the questions we ask with this lens to ensure that our questions are opening possibilities and not just re-affirming current barriers.



## If grant strategy is shifting to the next “new strategy buzz,” knowledge work can hold steady by embodying change.

Embodying equity in knowledge work is important when a foundation is transitioning to a new approach that is mindfully aligned with equity-driven mission and goals. It is even more important when the knowledge activities are the only steadying force while testing a new grant strategy that is not yet fully aligned with equity intentions. In this case, it helps to:

### **Show Up With Empathy**

Transitions of any kind can bring up feelings of grief, anxiousness, and even trauma. We need to remember that when we ask ourselves and others to develop new understandings or voice lived experience, we are inviting discomfort. When we ask ourselves and others to shift toward new meaning together, the level of risk must be met with the same level of empathy. Empathy involves a recognition of the fullness of human struggle and a willingness to invite individuals as whole beings into the knowledge space.

### **Acknowledge The History Of Knowledge Production**

The memories of authoritative and often unkind treatment from traditional knowledge institutions can also bring up trauma at the same time there can be unconscious fear around changing those patterns. It is important to name research processes that have been used for centuries to reinforce oppression as well as how current evaluative practices can bring harm to marginalized communities.



For example, researchers may conduct studies on communities to prove the presence of health disparities or social and economic inequities. All too often, community members are not compensated for the information and insights that they provide through surveys or focus groups. Most often, the findings of the studies are not shared back with the communities studied. In many cases, the research communities may not even benefit from new funding or programming that comes from their input. Unless we acknowledge and change these research practices, it is difficult to ensure that our knowledge activities are leading to greater equity.

### **Emphasize The Values Embedded Within The Knowledge Work By Explicitly Stating And Repeating These Throughout Any Transition.**

Those who do knowledge work are often expected to make sense out of overwhelm, information overload, and feelings of chaos. While boundaries are important in this context, one strong way to provide consistency is taking on a lighthouse role—steadfast in the notion that, as we explore and take emotional risk, there needs to be a place that symbolizes home and safety. In knowledge work, it is crucial to name and hold to values and practices that honor lived experience and the emotions, energies, and concepts that come with that experience.







CHAPTER

# 04

Knowledge Work as  
a Key to Effective  
Grantmaking

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Expanding creativity and variation in methodology may seem daunting. However, even though creativity opens endless possibilities, if you are engaging in knowledge work in grantmaking, there is inherent consistency. At some point, you will be asked to take on core elements of systematic inquiry—questioning, datamaking, and analyzing. This is where the rubber meets the road of all our good intentions.

Considering each of the scenarios above, we can challenge ourselves to think about how we are each tapping our role—in designing and asking questions, making decisions about data, and supporting the analysis. When embedded with an equity intention, these can become our superpowers, our toolkit, and our maneuverability through or around any resistance and barriers to change.

The missing piece in the field has been a framework for how we can identify opportunities where knowledge work can best be utilized and thus where to apply our consistent responsibilities and our methodological creativity.

## Knowledge Opportunity Scanning

Although philanthropy is known for pulling knowledge work and approaches from outside of philanthropy, we can utilize a framework that is actually grounded in philanthropic change efforts. It encourages those in knowledge roles to make methodological decisions from within the context of philanthropically funded change efforts. This is a transformational stance in a world where theory is treated as separate from practice, ideas come before engagement, and grantmaking and the work of social change are treated as separate.

Here, I like to use the metaphor of a house. No matter what its style or material, houses have walls. Even though we know that the walls have been constructed by humans and are able to be moved or torn away altogether, still on a daily basis we experience the walls as solid and immovable. These are the structures of our house that both make us feel safe and sheltered and exert a sense of what is possible in the house.

Within any house, there are rooms where things take place. Certain functions, conversations, and various interactions happen in particular ways dependent upon the spaces that have been formed by both the structures of the house and by the ideas and actions of the people who are inside the house.





At any given time, we can identify pathways through the house. This includes the way that individuals bring energy and move energy from one space to another. This is the heartbeat of the house, the pulse that can be felt a certain way during repetitive daily activity, another way when a gathering is taking place, or another way when a major home repair is happening.

For knowledge opportunity scanning, we use the concepts of structures, spaces, and pathways to come to a deep understanding about our context—specifically the beliefs, archetypes and narratives of our issue area or strategy. There are four explorations involved in knowledge opportunity scanning.

### **Structures**

are the walls of the house, those things that create boundaries and show up as real in any moment. Within grantmaking, this can include roles, organizational format, work policies and processes, stated or implicit. To identify structures, we can look at organizational charts, programming calendars, grant management layout, and even coding schemes and the ways information is categorized.

### **Spaces**

are the rooms and hallways and are signified by the engagement that happens. Within grantmaking, the exploration of spaces is about relationships, communication, and the ways of decision making. To explore spaces, we can look at information flows, how people are grouped or how they group themselves in their daily functions. We try to see where meetings, formal or informal, happen in relation to different occurrences or prompts.

### **Pathways**

refer to movement and activity in the house and are about energy flow. Within grantmaking, we can look at theory of change maps or meeting calendars and draw from the information archived in project management systems. Exploring pathways is also about identifying the places where bridging from one space to another is happening, where there are intersections, and how networks form and function inside or even between the interior and exterior.



### **Beliefs, archetypes and existing narratives.**

The exploration of structures, spaces, and pathways offers useful operational information for the knowledge work, revealing where questions, data, and shared analysis can be incorporated most naturally in conversations that are already occurring. More importantly, it illuminates the ways in which an issue area, change vision, and grant strategy are framed and possible barriers to change.

An important aspect of knowledge opportunity scanning is a “dialectic” embrace of how innovation happens in action. I use the term dialectic in its lay definition of moving from part or detail to a whole or big picture. It’s been my experience that creativity happens not in focusing on one or the other but in the movement between. I believe this occurs too in knowledge opportunity scanning when we move in and out of and across our exploration of each component to the broader context of our intentions and desires for change.

*Knowledge opportunity scanning, knowledge trajectory thinking, and change construct analysis* are signature processes of Knowledge Designs to Change, a strategy and research partner to foundations, intermediaries, philanthropy serving organizations, and funder collaboratives that are focused on advancing equitable change. For more information and resources go to [www.kd2change.com](http://www.kd2change.com)

## Don't forget technology

Just as knowledge work supports change strategy within chaos and complexity, technology is our tool for organizing, operationalizing, and enabling innovation through shared meaning making. Whatever technology means to your organization—virtual meetings, statistical software, video storytelling or your grants management software—shared meaning making is a key lens to help in deciding the benefits of any specific technology to your knowledge work.

- How does your technology simplify data management and coding approaches so that they align with your questioning and datamaking processes?
- How does your software support data-based conversations across internal departments?
- How does your technology help you to visualize structures, spaces, and pathways and, in doing so, make it possible to examine links between programming and community change?
- How can your primary platform help to connect grantees, staff, and community partners as a community of practice or learning network to generate deeper understandings and action around important social change efforts?

Every technological “solution” has an underlying analytic framework, or some idea of how analysis best happens. The analytic framework determines which attributes, tools, and features are available and how data can be collected, analyzed, visualized, and reported.

Asking these questions can help in choosing or customizing a platform so that it best aligns with your equity intentions. Not having enough time can make or break a great knowledge design.

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Choosing wisely when it comes to technology can make the difference as to whether the knowledge design is feasible.

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A group of people in an office setting. A man with long hair is holding a white mug and looking at a laptop. A woman with glasses is writing in a notebook. Another person is visible in the foreground, also working. The background shows office shelves and a window.

CHAPTER

# 05

Identifying Success in  
Your Knowledge Work:  
What to Be Aware of

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You reframed for shared meaning making. You identified opportunities and places where questioning, datamaking, and analyzing can open conversation and creativity. You examined barriers that come from old beliefs, archetypes and narratives. And you connected with the technologies that best align with the knowledge work you are doing. But there is one more thing. Even if complete operationalizing of your knowledge desires, aspirations, and design is possible, articulating success can be challenging.

You will undoubtedly be tasked with explaining why knowledge work is worth the investment and how to show that it is successful. You are not alone. I hear this over and over again from peers in the field. For work that is still not widely understood, and especially when we are seeking creativity in alignment with equity, it can be difficult to make visible the success of the knowledge work itself.

Most importantly it is crucial to recognize and share that knowledge work, even when intimately aligned with grant strategy, does not operate the same as the grant strategy. Theories of change might help us in mapping grant strategy. Grant cycle diagrams can help us visualize application, awarding, and monitoring sequence. Success indicators can be useful in tracking goals, inputs, outputs and results of grant strategy. However, none of these are very useful in pinpointing success in knowledge work. This is mostly because knowledge work is inherently iterative, emergent, and often ongoing—before, during and after grant strategies.

Along with knowledge opportunity scanning, two actions can help in reflecting and demonstrating success of the knowledge work itself.



## Trajectory Thinking

Trajectory thinking involves naming the knowledge challenge you are trying to address along with your intentions for how you want knowledge work to show up in the future. This results in statements about the nature of knowledge work and what you are moving toward in your knowledge activities. One example of a knowledge trajectory might be “moving from third-party outside research to shared inquiry through the engagement of grantees.” Another example might be “moving from working with external evaluators as observers to partnering with research scholars and learning partners.”

## Change construct analysis.

Those of us in knowledge work are often familiar with developing themes by categorizing data at a given point in time. Change construct analysis instead involves naming important areas for change and then noticing how concepts and practices shift over time. Change construct analysis is in service to what is becoming rather than a process of looking back. This analysis relies on documentation of the knowledge processes as linked to change efforts. It can be a powerful way to show how knowledge can go beyond documenting grant strategy and become integral to change itself.







## Maximizing Knowledge Opportunities for Change

This is an important moment for those of us involved in knowledge work in all its many possible manifestations. Our desires for equitable change are explicitly aligning with both philanthropy and knowledge work. Together as an emerging field in philanthropy, we can embrace the understanding that knowledge work (in all its forms) is essentially about shared meaning making. Making this one conceptual shift, we open up possibilities for how knowledge work can support, encourage, and be part of change.

Knowledge work can now be fully integrated into our grantmaking, not only as compliance and tracking, but also in how we support learning internally and across our grantee networks. It becomes how we contribute to new narratives of equitable change and how we actively show up as partners with the communities, change agents, and movements we seek to support.

## About the Author

### Angela Frusciante, Ph.D.

Principal and Founder of Knowledge Designs to Change

Angela K. Frusciante, MRP, PhD, is principal and founder of Knowledge Designs to Change, a strategic research and knowledge practice focused on change efforts. As an engaged socio-political scholar, Angela brings more than twenty years of experience working in qualitative inquiry and evaluation across the community, nonprofit, academic, and philanthropic sectors and in local, state, and national arenas. She is dedicated to advancing equity and supporting individuals and organizations in reaching their full potential. Angela believes in the power of the social sector to influence larger systemic change and has an enduring curiosity for how groups and communities activate equity through a shared voice and how funded change efforts inform and influence social, institutional, and policy action.



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### About Blackbaud

Blackbaud (NASDAQ: BLKB) is the leading software provider exclusively dedicated to powering social impact. Serving the nonprofit and education sectors, companies committed to social responsibility, and individual change makers, Blackbaud's essential software is built to accelerate impact in fundraising, nonprofit financial management, digital giving, grantmaking, corporate social responsibility and education management. With millions of users and \$100 billion donated, granted, and invested through its platforms every year, Blackbaud's solutions are unleashing the potential of the people and organizations who change the world. Blackbaud has been named to Newsweek's list of America's Most Responsible Companies, Quartz's list of Best Companies for Remote Workers, and Forbes' list of America's Best Employers. A remote-first company, Blackbaud has operations in the United States, Australia, Canada, Costa Rica and the United Kingdom, supporting users in 100+ countries. Learn more at [blackbaud.com](https://blackbaud.com) or follow us on twitter LinkedIn, Instagram and Facebook.





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