Research Center for Leadership in Action
NYU Wagner

PRACTICE NOTE

September 2008

Balancing the Needs of Product Development and Practitioner Learning:
The "Craft" of Testing Practitioner Tools

What's in this Practice Note

Getting input from a group of practitioners on a pilot product is an essential task in the development of any knowledge tool or resource. To obtain the input while also creating a space for dialogue and mutual learning is a craft requiring careful balance.

This Practice Note is designed to give facilitators and organizers of testing sessions for practitioner tools and resources insight into aligning product development and practitioner learning needs – in other words, advancing the tool's development *through* an environment of exploration, reflection and learning.

These practices also hold some insights for facilitators and organizers of peer convenings in general. We offer insights to help facilitators: 1) set the stage for an environment of mutual learning; 2) carry out the session, garnering feedback while providing value to attendees; and 3) follow up with practitioners in a meaningful way.

The Experience …

We draw on a joint Research Center for Leadership in Action (RCLA) and GrantCraft event to share some lessons learned about testing practitioner tools. GrantCraft, a project of the Ford Foundation, is a Web-based resource for grant makers who see effective philanthropy as a craft developed over time and are interested in reflecting on and improving their grant making.

The insights in this Practice Note are around achieving the task - advancing the end product through practitioner feedback, while doing this as a craft – where practitioners can explore a topic of interest and reflect with each other about their professional experience.

In April 2008, RCLA and GrantCraft brought together philanthropy practitioners in a morning peer session about an innovative GrantCraft tool. The tool is called Roles@Work, a deck of cards that helps grant makers reflect on the various roles they play in their work, as strategists, conveners, etc. The roles are based on stories shared by grant makers during a series of interviews and workshops. RCLA's focus on peer learning - helping professionals reflect on their experiences and learn from each other - made us natural partners on this testing project.

RCLA Practice Notes offer practical guidance about sound leadership practices by drawing on leaders' experiences using various techniques, tools, and approaches in dealing with critical social issues. More information is available at www.wagner.nyu.edu/leadership.

SETTING THE STAGE

An event can be planned in a way that offers practitioners the opportunity to learn from each other while ensuring that the organizer collects the input needed for product development. Here are some suggestions:

- **Balance commonality and diversity in participants:** To establish a peer learning environment, a certain level of commonality is needed. Event organizers should invite practitioners who regard each other as peers because they belong to the same profession or employ similar practices. While different groups may be potential users of the tool being tested, we advise holding a separate testing session for each group of peers. Diversity within the group should be encouraged to the extent that it serves the purpose of the organizers in obtaining feedback and advancing the tool. One suggestion is to identify only one or two elements of diversity that would enrich the feedback.

  The Roles@Work card deck could be used by grant makers and other foundation staff, as well as consultants working with philanthropists, yet we held the session for grant makers only. Within the same group, we encouraged diversity by inviting program officers handling different portfolios and from a range of foundations in terms of size.

- **Clarify roles**: As with organizing any event, it is essential to identify the different players involved and their roles. A good practice is to imagine various scenarios that may arise during the event – for example, a participant dominating a discussion, or the group wanting to talk about something not on the agenda - and to proactively think about who would do what in such scenarios.

  We couldn't test a tool that helps philanthropists think about their various roles without the organizers clarifying their roles for the day. The various partners in this testing session included the organizers (RCLA and GrantCraft), facilitators who guided small group discussions, the note takers, and of course the attending practitioners. We set an internal agenda that included a 'role' column identifying who would be responsible for each activity of the morning and what they would do. Our partner from GrantCraft who created Roles@Work introduced and closed the event. Meanwhile she acted as a "fly on the wall," which enabled her to listen in on multiple conversations, further providing material that could improve the tool.

- **Recognize and manage trade-offs:** Trade-offs are inevitable, especially for ambitious organizers juggling multiple objectives. When inviting busy professionals to a short session, limited time will typically result in a trade-off.

  An example will illustrate: Instead of merely sharing Roles@Work on the day and asking participants for their feedback, we wanted to have an experiential exercise where participants had the opportunity to reflect on their roles. One idea was to ask participants to individually come up with six roles they each play in their work as a grant maker. In small groups they would then be asked to compare the self-identified roles to the roles in the established deck, generating a discussion around terminology, gaps and roles they thought should be added. The task was to map the self-identified roles onto the card deck, creating a new set.

The time limit raised a concern: What if it was too much to ask participants to compare the self-identified roles to the established deck? The time constraint almost swayed us towards a less creative, more linear and safer process. Yet in keeping with the objective of encouraging mutual learning, we decided to keep the exercise of asking participants to generate their own roles. A few extra minutes were allotted to this activity by shortening time for the introduction.

TESTING AND LEARNING IN ACTION

Here's the part where we discuss some tips for the session in action. For testing tools like Roles@Work that are designed to generate dialogue, it is important to think of the session in a parallel fashion: While practitioners are providing feedback on the tool, they are also engaging with the tool in live mode, providing a glimpse of how it might be used in "real" situations. The kinds of conversations that happen in the testing session are indicative of those that the tool might spur in actual settings. So, in testing a tool, organizers can in tandem discover whether the tool resonates with the practitioners, while exploring how it might actually be used in professional contexts.

- **Trust the wisdom:** As experienced professionals, the session participants are the real experts grappling with the challenges their work presents. This means that participants may actually know more about the topic at hand than the organizers think, but may lack the language and concepts for framing what they know.

  In introducing the testing session for Roles@Work, GrantCraft recognized the sophistication of the work of the practitioners present. The notion of role was introduced as follows: Instead of talking about role in the abstract, it was important to affirm that practitioners know a lot about taking up a role already. In other words, it is known but not named. Starting the conversation by recognizing their own wisdom invites subsequent exploration of the subtleties and creativity inherent in the practitioners' work, reminding them that it is truly a craft.

  As another example, instead of sending the Roles@Work card deck to participants in advance of the event, which may have saved time during the session, the organizers decided to share the deck after participants had generated their own roles to avoid any bias. We believe that allowing ample time for the small group to make sense of the deck in real time allowed the discussion to flow more organically to cover challenges participants face in their work. Had the deck been sent in advance, participants probably would have come ready to provide feedback on the deck but short-circuited the rich discussions that ensued around the notion of "role." One conversation revolved around the difference between imposed roles and chosen roles, and another conversation distinguished between valued roles, i.e. roles that grant makers like spending their time doing, and duty-bounded roles. These discussions offered a glimpse into the kind of dialogue that one would expect the card deck to spur within foundations.

- **Encourage self-reflection:** For a testing session to be of value for both organizers and practitioners, it helps to see it as an opportunity for practitioners to reflect on their work – a small luxury not always available for practitioners amidst their busy schedules.

  One way we encouraged self-reflection at the Roles@Work testing session was to ask grant makers to share stories of a time when they used one of the roles identified to achieve a breakthrough in their work. This exercise was done in pairs to maximize the time allowed for the story-sharing. Structuring the exercise around a "breakthrough" was a positive way to spur reflection and dialogue.

  Organizing the session around reflective exercises for the grant makers created value for them. There is power in naming something that is intuitively performed in the work. When prompted for reactions to the tool and the session in general one participant commented, "Exciting … I didn't know I did all of this."

- **Invite dialogue (in varied formats):** It makes sense to have discussions as part of testing sessions for resources that are designed to generate dialogue. The lesson here is to use activities and methods in the testing session that are consistent with the product being tested.

  In our testing session, we used three formats of dialogue: First, grant makers shared stories in pairs; second, small groups compared individually generated roles with the role deck; and third, everyone came together in a large group discussion to talk about possible uses for the deck. Varying the format of the dialogue allowed more practitioners to talk to each other and minimized monotony. Varied formats also offer opportunities to capture feedback from all participants regardless of their learning styles.

- **Create fluid frameworks for sense-making:** As rich as group discussions can be, practitioners can be left with a sense of chaos if a process for interpreting those discussions is not accounted for. One way to do this is to provide fluid frameworks that add a bit of structure to the conversation and help participants reach another level of analysis and thinking.

  As an example, in our testing session a framework was offered for each of the three small groups to explore and organize the deck: ideal versus real roles, roles by function, and grantee-focused versus internal foundation roles. Participants in each group were encouraged to think about whether they see a pattern in the card deck that reflects the framework. The frameworks, however, were not imposed structures – one group decided not to use the framework of ideal versus real, and instead talked about values as an overlay that attributed meaning to the definitions and applications of the cards.

CONTINUING VALUE: FOLLOWING UP

Following up with attending practitioners is more than a mere courtesy – it is a strategic act that helps to continue the positioning of the tool created. Here are some suggestions for follow up after the testing session has formally ended:

- **Debrief with event partners:** A good practice is to make time to debrief about the event. If external facilitators are involved, it is worthwhile to debrief with them about how they think the tool can be improved and how they might use the tool themselves.

- **Improve the tool:** This may seem like an obvious point, but there needs to be a systematic mechanism for incorporating the feedback into enhancing the tool. In the case of Roles@Work, our colleague from GrantCraft took all the new roles suggested, mapped them onto the existing Role Deck, and began to consider, while talking with others, what to include and what to update to reflect the role with more clarity. Acting as a "fly on the wall" during the event inspired her with some new ideas about how to use the tool in workshops.

- **Share the final product and recognize contributors:** It is advisable to share the final product with the participants after the necessary tweaks and adjustments. Participants in the testing session also greatly appreciate when their names are recognized as contributors to the tool's development. This can be done in a foreword, appendix or through a digital link if the tool is posted online.

- **Share further resources:** Depending on revenue and cost considerations, it might also make sense to share a package of the organizers' other resources and tools relevant for the same group of practitioners. Practitioners are more likely to read the material after spending some time with the creators in a testing session, especially a well planned one. Another idea is to share information on similar products created by other organizations that the participants might find useful.

- **Add participants to the mailing list:** Given that the testing session is organized well – providing opportunities for both feedback and mutual learning – attending practitioners may be interested to learn about future resources. Participants' coordinates can be added to the organization's mailing list for sending future announcements or publications.

KEEP IN MIND

These are some important logistical tips to keep in mind:

- **Try to keep the event to a short morning session:** If experienced professionals are the target attendees, a testing session needs to be planned with their time in mind. It is best to keep it to a short early morning session, with breakfast included. After rich discussions and networking, practitioners will feel invigorated to start their day at work.

- **Make sure note takers are clear on what they should capture:** It helps to provide guiding questions or to ask note takers to capture the flow of the conversation, the end product of the task or both.

- **Iron out transitions:** Keeping the session concise will require paying close attention to transitions. In our Roles@Work testing session, there were six activities in less than three hours, being introduced and facilitated by five consultant facilitators and organizers from both GrantCraft and RCLA. To keep transitions as smooth and seemingly effortless as possible, we designed a detailed internal agenda that acted like a script, providing information on what the purpose of the activity was, how it would be carried out and who would be doing what.

More on the Genesis of Roles@Work
By Jan Jaffe, GrantCraft

I started Grantcraft in 2001 to collect and share reflections from practitioners about their practice as grant makers in a wide variety of foundations. Everything we produce is at www.grantcraft.org as a project of the Ford Foundation to support learning and maturation of the field of organized philanthropy as it grows with the transfer of wealth worldwide.

We offer practitioners an opportunity to learn from and benchmark themselves against other grant makers using specific tools and skills that support social change. One of guides we've developed is called Personal Strategy. It offers guidance on leadership in role, especially in difficult situations when power imbalances are at play. In order to develop the guide, my colleague William Ryan and I piloted workshops with many talented grant makers who brought us dilemmas and insights based on real life experiences.

We asked participants at each session to name the roles critical to their work inside their foundation and with grantees. Since that was not the primary task of the session and our time was short, I started to share the roles collected from previous sessions and then put them into a deck of cards instead of shopping list. (I was inspired by the values cards for intergenerational conversations in family foundations developed by NYU Wagner graduate Sharna Goldsecker, available at www.2164.net.)

To my surprise, participants became animated by the card deck in a way that they didn't when presented with the same roles in a list. The card format seemed to invite them to go deeper with their experiences in different roles: They wanted to group the cards into what they did too much of and not enough of, discuss why there were so many words for convening (for the same reason that Eskimos have so many words for snow), pull the roles that were more difficult in their specific contexts, collect roles that their board would be surprised to learn they played, ask for a story about being in one role or another, and use the deck to talk about how a team might divide up the roles etc. That was not really what I had intended!

The GrantCraft workshop is focused on helping grant makers integrate concepts about role construction and self-in-role into their daily work to be an aid in difficult situations. What practitioners taught me was that the design of the information – in a card deck vs. a list – created a complementary tool. It allowed people to talk about roles in ways that are rarely discussed. The design seemed to represent the complexity of work in roles in an accessible way. Through my contacts with the Research Center for Leadership in Action, I met Chuck Palus, who introduced me to the Visual Explorer cards that stimulate similar kinds of reflection about complicated situations. If you are interested in the relationship between product design and reflection, I'd recommend an article by him and Bill Drath on mediated dialogue as "putting something in the middle."
http://www.visualexplorer.org/downloads/Mediated_dialogue_Palus&Drath.pdf

The GrantCraft Roles@Work card deck – 29 cards plus a guide for facilitation – will be available at www.grantcraft.org in October 2009.

I'd love to hear how you use what we offer. Contact me at j.jaffe@grantcraft.org.

Additional RCLA resources include:

Practice Note: Story Circle Method - June 2008
How to facilitate storytelling as a powerful tool for bringing people together to build relationships, identify common threads of experience, and generate insight from personal and professional realms.
http://www.wagner.nyu.edu/leadership/practice_notes/Practice%20Note_Story%20Circle.pdf

Practice Note: Visual Tools - May 2008
How to use graffiti wall, visual explorer, and murals/tapestries to bring clarity to an issue or problem that otherwise seems murky or intractable. These tools can be used to facilitate difficult conversations, build connections among diverse groups, and help leaders problem solve.
http://www.wagner.nyu.edu/leadership/practice_notes/Practice%20Note_Visual%20Tools.pdf

Practice Note: Designing Peer-to-Peer Learning Exchanges - April 2008
How to organize and facilitate learning exchanges among leaders who share an understanding of each others' common challenges, experiences, and practices in such a way that enables participants to apply new learning 'back home' in their own organizations.
http://www.wagner.nyu.edu/leadership/practice_notes/RCLA%20Practice%20Note_Peer-to-Peer.pdf

Research Center for Leadership in Action
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The Research Center for Leadership in Action (RCLA) at New York University's Robert F. Wagner School of Public Service supports leadership that listens to many voices and serves as a resource for making systems and organizations effective, transparent, inclusive, and fair. RCLA supports change agents tackling critical public challenges through rigorous, practice-grounded research and reflective processes that strengthen the theory and practice of leadership.

As part of this work, RCLA crafts and runs customized, experiential leadership programs that both expand individuals' skills and strengthen the organizations in which they work. RCLA develops structured convenings where leaders explore the complexity of the challenges they face and together advance their efforts to make change possible. As an academic center, RCLA conducts rigorous social science research, employing a variety of innovative and participatory methodologies to the issues of contemporary leadership.