Research Center for Leadership in Action
NYU Wagner

PRACTICE NOTE

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Designing Peer-to-Peer Learning Exchanges

IN THIS PRACTICE NOTE…

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Introduction

Peer learning is of growing importance in leadership and professional development fields. It is an approach that values practitioner knowledge and promotes reflective practice as a way to make knowledge explicit, so it can be applied with intention and shared with others.

Supporting interaction among peers can foster some of the most fruitful learning because peers often share a deep understanding of each others' common challenges, experiences and practices, and have developed valuable expertise in their fields. Naturally, peers can deliver information and knowledge in practical ways. Many also bring experience and insights from experiments or innovations they have developed to address new challenges, which can be then shared with others in similar circumstances. For these reasons, peer engagement can simultaneously deepen and quicken learning.

Peer exchanges can be most beneficial among peers who are part of the same "community of practice" – people who share similar job roles or functions (like development directors, frontline service providers or social justice leaders), and therefore face similar challenges or purposes. It can also be beneficial if they work in the same field (criminal justice, youth development or hunger prevention), although in some cases, an exchange with peers in an entirely different field creates opportunities to learn new ways of working. Overall, peer-to-peer exchanges offer structured opportunities to learn from each others' practice.

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

This note describes practices that facilitators (whether external to the peer group or within it) can use to support peer-to-peer learning in a variety of settings.[1] Taking a broad view of facilitation, the support may span several weeks before and several weeks after actual peer encounters. This support takes advantage of opportunities to deepen learning and address the challenge of applying new learning "back home" in participants' own organizations.

To illustrate these practices, we draw on one of RCLA's collaborations with the Center for Applied Research (CFAR). Our shared role in this project was to design a series of peer-to-peer activities to support the development of the grantee organizations of a national New York-based foundation. We focus on one "learning journey" (CFAR 2006) that we organized for peers from six organizations, one of whom was the "host" of the journey. The host had developed a highly functioning approach to performance management and had learned to make continual performance improvements through the collection and analysis of data. Their approach has become an industry standard. The journey was meant to provide participants with an opportunity to learn about the host's performance management culture and practices. Participants were encouraged to share their own best practices and reflect on how the host's work could shed light on their own performance management challenges.

Pre-Work

When designing peer-to-peer exchanges, one of the most important tasks for facilitators is to prepare participants in advance. Keeping in mind that peer exchanges focus on improving practice, individually or organizationally, there are many benefits to "pre-work." People come to the meeting more informed and prepared to engage because they have already thought about their practice and their challenges. Thus, they gain an opportunity to bring a richer set of ideas and questions to any discussion or learning that is going to take place. By prompting a group of peers to share early ideas and questions with each other in advance – via e-mail, listservs or wikis – facilitators can foster a sense of curiosity and community, which also enhances learning. Similarly, when participating peers share ideas with colleagues at home, they often feel accountable to bring the learning back.

Here are suggestions for "pre-work":

- Circulate a brief reading that is relevant to the meeting topic at least a week in advance, with *brief* being the operative word. Many practitioners are extremely busy, so making the material short and sweet will ensure that many will actually read it. For example, for our learning journey on performance management we sent participants an abstract of a well-known performance management text, and shared information about the host organization's mission, history and culture. These materials created common ground from which to launch the event.

- Ask participants provocative questions about the topic or the reading to inspire thinking. Questions can help people focus on relevant points on the learning agenda or simply engage participants in a more active way. The point is to get the juices flowing so when the meeting happens peers already have dedicated time to think about the issues. For example, during our performance management trip, we asked participants to 1) answer a series of questions about their own performance management practices, 2) list their "burning" questions and concerns, and 3) describe their own best practices. This pre-work not only encouraged participants to take

[1] While we are promoting a particular definition of peer-to-peer exchanges, the practices in this note have broad application. They can be used by advisory boards, boards of directors, in staff meetings, and so on.

ownership of their own learning, it served two other key purposes: it gave people an opportunity to see their common challenges, opening up opportunities for further dialogue; and helped them realize their own potential contributions to the groups' learning.

- Set up an electronic "space" so people can share these reflections before the meeting. Another way to encourage learning is to set up a space for people to share ideas with each other in advance of the meeting. An electronic space can be as simple as a listserv or a wiki. Both are useful for conversation. Wikis are also useful for sharing heavier loads of information among a broad group of people. While electronic communication has a lot of potential, people are generally inundated with it, and are unlikely to use electronic spaces regularly unless they contain important, relevant and timely material. People are busy, so make it worth it! Or use it for specific and limited purposes.

- Encourage participants to have a conversation with colleagues in their own organizations who are not going to the meeting. For our performance management learning journey, we asked participants from each organization to convene a group of three to four staff within their organizations – who would not be joining the journey – to discuss it. These meetings served two important purposes. First, they allowed the people "staying home" to raise their questions and concerns so those participating could gather any helpful ideas and respond to their concerns. Second, they helped make people at home feel a part of the trip which in turn generated their buy-in to any changes that might be made in the organization as a result of the experience.

- Find out what participants most want to cover in the agenda. An important role that facilitators play is managing the learning agenda. This goes beyond organizing the order and flow of topics of discussion to looking more deeply into what participants want to learn. A creative way of finding this out is to ask participants to envision the future: "If you were to come back from the exchange feeling like it was worthwhile, what would have happened?" From this inquiry, facilitators can remain mindful of what issues resonate most for participants.

II. During the Exchange

During the exchange, there are important practices a facilitator can implement to support peer-to-peer learning that are different from everyday meetings. The emphasis in peer-to-peer exchanges is to ensure that the knowledge in the room – peer knowledge – is shared in ways that are useful for addressing participants' key challenges and curiosities.

- Encourage storytelling. Telling stories, rather than presenting abstract concepts, helps to ground ideas in concrete details and experiences. In peer-to-peer meetings, this feature of stories is particularly important because it helps with the transfer of knowledge from one context to another. When we hear stories, we can see the specificity of a case, and note similarities and differences to our own situations. This allows us to imagine how innovations or lessons would need to be adjusted to work in a different context. In our learning journey, our host had developed a compelling story about the evolution of performance management in their organization. They began, not with abstract ideas about measurements and databases, but with a story about how they completely reworked their organizational values – to make them actionable and compelling – as a step toward a performance measurement culture. Others in the group were excited by this story. One participant even revised their organization's statement of organizational values as a first step toward performance management reform in their organization. There are several techniques facilitators can use to encourage storytelling such as Story Circles (RCLA 2007), fishbowls and check-ins.

- Combine story-telling with concrete "hard" skills. Storytelling can be combined with sharing "hard" skills. Whether or not you want to complement storytelling with opportunities for training on specific techniques depends on the nature and purposes of the exchange. Often, though, practitioners are seeking practical, "how-to" advice that will make their organizations or campaigns run more smoothly. Creating space to learn practical techniques can satisfy this need, and help practitioners feel like they have something to take away that is concrete and specific. During our learning journey, our host combined story telling about organizational change with very concrete practices, for example, about creating an easily accessible interface – called a "dashboard" – that gave managers up-to-date performance information relevant to their area of responsibility.

- Vary meeting format to keep energy high. When meetings last for more than two hours, groups can loose focus. Shifting the format of the meeting can keep energy high. Different formats might include full group work (good for creating common ground in the beginning and reconnecting in the middle and end of meetings), break-out groups (good for deeper sharing, dialogue and skills building), and tours (good for seeing work in action and getting people on their feet). It is also critically important to leave plenty of time for breaks to let people recharge. During our journey, we incorporated a tour of the organization's facilities to see how they "lived" their values. We had opportunities to hear from various staff with different points of view, which also gave us a deeper understanding of the organization and its practices.

- Begin to make lessons actionable by opening a conversation about what to do with the new information. Near the end of peer-to-peer meetings, it is often useful to create a space for participants to think about what they have learned, and how it might be useful to some challenge they are facing in their own organizations. These reflective spaces can be structured in different ways: dyads or small groups can discuss with each other, then report out, for example. Individuals can also offer their own reflections to the whole group, which are then used to generate a conversation. Whatever the structure, the purpose of these reflections is not to come to a consensus, but to allow people to express and articulate early insights, and raise new questions. In our journey, these moments were particularly helpful for the facilitating team because they offered us clues about the learning that was happening and what topics might require more follow up (see below).

- Take time for evaluation. At the end of meetings, facilitators can create spaces for people to express what they found most useful about the meeting and what they would have changed. This is particularly important feedback for on-going groups because the feedback allows facilitators to make adjustments as they move forward. During our journey, we learned that people enjoyed the balance in presentations between aspirations and practical tools, and the grounding of the visit in the story of the host organization's growth and development. But they also would have liked more time to work in their "home teams" to process what they were learning, and to go deeper into some of the practical tools that were being presented.

- Create opportunities for participants to (co)facilitate. Facilitators can reinforce the idea that peer exchanges privilege the knowledge, experience and expertise of those participating by creating opportunities for peers to facilitate or co-facilitate parts of the exchange. During our journey, the host organization facilitated many of the sessions that involved presenting their own practices and sharing their story. While the group agreed that the facilitators should guide the reflective sessions between these presentations, in other projects we have opted to co-facilitate to generate more ownership over the agenda, and to provide opportunities for different voices to guide the conversation.

III. Follow up

Creating concrete opportunities for the group to reflect on what they learned a week or two after peer-to-peer exchanges is also an important step to making the learning actionable and ensuring its application "back home." Often a week or two after the meeting, participants will have had time to process what they learned in ways that are connected to their day-to-day work. It is an important moment to keep the learning alive, and take advantage of any momentum or inspiration that may have been generated in meetings. The ultimate hope is that each participant, and their colleagues in their organizations, will "retain" the knowledge that is useful to them in the sense that it becomes integrated in how they do their work.

- Organize a "debrief" conference call or meeting. The best debrief meetings are organized around reflective questions or commentaries that mirror what participants learned during the peer exchanges and pose questions about what happened since. Facilitators can prepare "debrief memos" – that capture what was learned during the peer exchange and pose questions to the group about what happened since the exchange. These memos can be shared with participants in advance of debrief phone calls and used to organize the calls. In our journey, we created a brief memo (about five pages) that captured key themes discussed during the journey. The memo reported back to the group the stories and practical strategies of our host, as well as the reactions, questions, and insights from participants. After each theme, we posed what we hoped were compelling questions that gave participants another opportunity to reflect on their challenges and how they might advance their work. We sent these memos to participants about a week before the phone call. We organized the conference call around the memo, and took careful notes during the conversation.

- Leave people with a written document that captures lessons and ongoing questions. In addition to the debrief memo, facilitators can provide participants with a fuller document that faithfully captures the content of the peer exchanges and debrief meetings, especially participants' reactions to what they are learning. These "reflective memos" go beyond the learning of the particular group and can bring in the knowledge and perspectives of facilitators as well. In the performance management journey, we expanded the debrief memo into a final report that captured key themes and lessons from the learning journey, participants' reactions to the memo, and their comments about what had taken place in their organizations after the journey. The memo included many quotes to capture their knowledge and insights in their own words, and served as a reference for them in the future.

Conclusion

Peer exchange is an exciting innovation in leadership development work. This practice note shares some ways we have arranged and facilitated peer-to-peer meetings drawing on a philosophy of peer exchange. Our practice is based on the principle that practitioners have knowledge that is valuable – for themselves when made explicit, and for others when shared. We hope this practice note offers useful lessons for designing your own peer-to-peer meetings.

References

CFAR (2006) *Briefing Notes: The Learning Journey as a Change Strategy*. Philadelphia: Center for Applied Research.

RCLA (2007) *Practice Note: Story Circle Method*. New York: Research Center for Leadership in Action.

Relevant RCLA Resources

Practice Note: Rapid Peer-to-Peer Resource Exchange - December 2008
This Practice Note explains how to prepare and facilitate session in which leaders can exchange knowledge and resources with peers in under 90 minutes.
http://wagner.nyu.edu/leadership/reports/files/PracticeNoteSpeedDating1208.pdf

Practice Note: Story Circle Method - June 2008
This Practice Note shows 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 experience.
http://wagner.nyu.edu/leadership/reports/files/PracticeNoteStoryCircleMethod0608.pdf

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