



LEARN AND LET LEARN

SUPPORTING LEARNING COMMUNITIES
FOR INNOVATION AND IMPACT



**Research Center for
Leadership in Action**
NYUWagner

Scaling What Works
A LEARNING INITIATIVE OF



GRANTMAKERS FOR
EFFECTIVE ORGANIZATIONS

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GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS

Grantmakers for Effective Organizations is a community of more than 400 grantmakers challenging the status quo in their field to help grantees achieve more. Understanding that grantmakers are successful only to the extent that their grantees achieve meaningful results, GEO promotes strategies and practices that contribute to grantee success.

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Through the *Scaling What Works* initiative, Grantmakers for Effective Organizations is exploring how learning together can contribute to scaling good work and specifically how grantmakers are using learning communities to grow nonprofit impact. This guide stems from the desire to learn more about how to best support learning communities. It offers key findings from a research report produced for GEO by the Research Center for Leadership in Action at New York University's Robert F. Wagner Graduate School of Public Service on the design elements, positive practices and outcomes of six learning communities in the field.¹

INTRODUCTION

The urgency and complexity of the problems nonprofits and grantmakers are trying to solve demands that they come together to glean insights from their work, leverage resources and combine forces. Learning communities are powerful vehicles for both individuals and communities to amass a shared collection of experience from learning and results from collective action.

The solutions to complex challenges are not always apparent. In the social sector, solutions tend to emerge through a cycle of reflecting, accumulating knowledge and taking action. Yet practitioners often have difficulty embracing this learning cycle because their organizations face staff capacity shortages, a pressing mission or a host of other demands.

With the right impetus and support, though, practitioners can meet these challenges head on. A learning community helps participants understand how to make their work more effective, find innovative solutions to thorny challenges and scale the best ideas and practices.

Grantmakers are well positioned to provide the types of support to catalyze, develop and sustain learning communities. This guide is based on an in-depth analysis of six learning community case studies and offers key learning for grantmakers about the design, execution and outcomes of learning communities. As the case studies in this guide illustrate, funders also benefit mightily as participants.

1 Introduction

5 Design for Success

- *Make it relevant*
- *Think about "the who"*
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- *Embrace fluid structure*
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- *Be open to unanticipated outcomes*
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1. This work culminated in a research report including six in-depth case studies of learning communities that have greatly advanced both the work of their members and their fields. See the appendix for a summary of the six case studies.

WHAT IS A LEARNING COMMUNITY?

A *learning community* is a group of practitioners who, while sharing a common concern or question, seek to deepen their understanding of a given topic by learning together as they pursue their individual work. Learning communities are also known by other names, such as *communities of practice* or *learning networks*. These communities are based on the notion that peers exchange knowledge, acquire skills and change their practice in and through social relationships.² Learning communities are distinct from other learning structures (see inset), and while learning communities themselves can take many forms, they are defined by three primary characteristics:



Participants learn ***in action*** while grappling with real-life questions; their participation complements their day-to-day work and responsibilities. Learning communities create opportunities for participants to apply what they are learning. They enable participants to draw from current and past experiences to identify and make changes in their work.



Participants learn ***together***, generating collective wisdom as a group; reliant primarily on peer exchange and the assumption that peers have something valuable to offer each other, learning communities are focused on combining, codifying and spreading the knowledge the group has generated from being together. This stands in contrast to exchanging learning each person could have arrived at on his or her own.



Participants learn on an ***ongoing basis and over time***, taking part for as long as they see value in participating.

“The professional learning community should not be an add-on to what grantees are already doing. We always say, ‘If the work is not directly related to what you’re trying to accomplish then let’s stop doing it and go on to something else that is.’”

Jody Spiro,
The Wallace Foundation,
Education Leadership Professional Learning Communities

2. Jean Lave and Etienne Wenger, *Situated Learning: Legitimate Peripheral Participation* (New York: Cambridge University Press, 1991).

In many instances, learning communities are supplemental supports to traditional grants and can be one component of a larger initiative.

To determine when or if a learning community should be formed, consider whether prospective participants have expressed an interest in learning from each other and have the opportunity to convert knowledge into action. A grantmaker's comfort with participant-driven programming and appetite for long-term investment are also critical factors.

EXAMPLES OF LEARNING COMMUNITIES

Learning communities consist of peers who may be diverse but share common questions, areas of work or challenges. They have been effectively used to address a variety of topics and issues. Below are the topics of focus for the six case studies featured in this report:

CASE STUDY	TOPICS AND ISSUES
EMBEDDED FUNDERS LEARNING COMMUNITY	Supporting grantmakers as change agents
EUREKA-BOSTON	Supporting collaboration among nonprofit executive directors
COMMUNITY CLINICS INITIATIVE — NETWORKING FOR COMMUNITY HEALTH	Creating community-based health networks and raising the profile of community health clinics
COUNCIL OF MICHIGAN FOUNDATIONS — PEER ACTION LEARNING NETWORK	Strengthening foundation and nonprofit capacity in diverse and inclusive leadership, management and grantmaking
SCHOOLS OF THE FUTURE — COMMUNITY OF LEARNERS	Applying innovating approaches to learning in schools
THE WALLACE FOUNDATION — EDUCATION LEADERSHIP PROFESSIONAL LEARNING COMMUNITIES	Strengthening school leadership through collaborative, peer-based learning

OTHER TYPES OF LEARNING STRUCTURES

The learning community is one type of structure used to help improve learning and capacity. Other ways to support learning include:

- trainings — imparting knowledge or building skills, mostly through an expert-led discussion;
- fellowships — in-depth professional development over time;
- retreats — coming together for a time-bounded activity, often off-site, to launch a collective effort or reflect on past action; and
- summits/conferences — intensive sharing and knowledge exchange in a short period of time with a large group.

WHAT KEY ROLES CAN GRANTMAKERS PLAY?

Once a decision is made to launch a learning community, grantmakers can play a variety of roles. These roles may not be a component of every learning community. In addition, roles may change over time. The following are some typical roles funders can play:

Catalyst Identifies potential learning communities and helps connect participants to one another by drawing attention to their shared interests.

Sponsor or Funder Provides the financial resources for starting, sustaining and transitioning the learning community from one phase to the next.

Organizer Assists in designing, structuring, governing and implementing the learning community; sometimes is also the sponsor and/or a participant. An organizer assists with participant recruitment and links participants to people and resources both inside and outside the group.

Participant or Peer An active partner in the learning community.

The potential effect of grantmaker presence and engagement in the learning community requires consideration in advance. Grantmaker participation in learning community events can sometimes unwittingly trigger hesitation on the part of other participants in voicing opinions.

“Grantmakers should be cognizant and respectful of the amount of oxygen they suck out of a room,” advised Steve Pratt, facilitator for Eureka-Boston. “It is best to pick the moments to enter the conversation.”

FACILITATORS

At their best, facilitators:

- acknowledge everyone’s perspective;
- connect peers who share common interests and suggest other resources;
- create safe spaces for peers to share openly and honestly;
- document and synthesize learning;
- help ensure accountability and gauge progress toward fulfillment of group and individual commitments;
- help the group navigate a dual focus on individual objectives and collective aspirations;
- help participants reintegrate and apply the learning back home;
- motivate the group by cultivating and celebrating early wins; and
- support the group through ambiguity, particularly because it may take some time to arrive at learning that feels valuable or immediately applicable.

The success of a learning community may hinge on its facilitator. Usually hired by the sponsor or organizer, the facilitator guides participants through the learning process and supplies content expertise when appropriate. The facilitator also helps participants see the big picture of the learning that is emerging.

HOW CAN WE LEARN AND LET LEARN?

In analyzing the six case studies, GEO and the Research Center for Leadership in Action identified nine key insights for grantmakers about what goes into building successful learning communities across three stages: *design for success*, *execute for success* and *extend the success*.

Grantmakers can use these key insights to forge stronger and more resilient learning communities among grantees, as well as with other funders and partners. In the following section, we examine each insight more closely.

DESIGN FOR SUCCESS



Learning communities are an opportunity to advance participants' day-to-day work while building collective knowledge. But to do so well, the learning community must have a participant-centered design. This section focuses on the insights that are critical in the design phase so that the learning community generates value for all stakeholders and achieves the desired goals.

1 MAKE IT RELEVANT

A learning community exists to maximize participants' effectiveness in their own work, so it needs to stem from participants' objectives and priorities and be relevant in their day-to-day work. One way to ensure relevancy is by engaging participants in the design to ensure that the structure aligns with participant needs. In some instances, this participant-centered approach has led to new projects and collaborations among participants as they apply what they are learning in new ways. For example, one learning community project group in the Wallace Foundation's education leadership learning communities came together to explore ways to improve mentoring for new principals. The group created a new tool to guide discussions between mentors and those they coach. The tool has now been adopted by growing numbers of states and school districts across the country.

Grounding the learning in firsthand experience, such as site visits, increases a learning community's relevance. Participants can draw new insights about their work and deeper understanding of the broader context. For example, Schools of the Future organizers invited participants to join a study tour of High Tech High School in San Diego, a renowned charter school. Participants found the tour meaningful to their own schools and were inspired by what they learned.

2 THINK ABOUT "THE WHO"

An individual participant may gain much from a learning community but is likely to have trouble making changes within their organization if he or she is the lone representative. If the learning community is designed to spark organizational or practice change, it should include participation by teams, senior leadership or (ideally) both. Additionally, since full engagement may pose a challenge for small organizations, the learning community's design should allow for different participation levels and points of intersection for its members.

Second, while a common concern or question brings a learning community together, participant diversity creates interdependence in learning because participants complement each other's expertise. Diversity can take many forms, from type, mission and focus of participating organizations to individual professional backgrounds. Diversity makes collaboration possible because each participant has something to contribute. Also, to address a mix of perspectives and experiences, the group develops knowledge and solutions that are relevant across different contexts.

“When you have people who are faced with the same issue but face it in different contexts, there is a specificity of language that you have to develop that clarifies the thinking, and so as that gets clearer, you can become a little more precise with your solutions.”

Kathy Nadurak, New York City Leadership Academy,
The Wallace Foundation,
Education Leadership Professional Learning Communities

3 INSPIRE A COLLECTIVE AND BOLD VISION

In the case studies, many participants contributed to the greater good in addition to their personal or organizational transformation. Alongside getting help with something pressing in their own work, participants value the sense that they are tangibly contributing to something larger. For example, the learning communities we studied worked to support educational leadership nationwide, build the nonprofit sector in Massachusetts and advance diversity and inclusion in Michigan philanthropy. Such ambitious goals can intensify a participant's sense of purpose as they connect his or her work to a larger collective effort. In some instances, the larger vision for the learning community is established at the outset. For example, the Community Clinics Initiative launched a learning community as part of a strategy to make community clinics the catalyst for improving community health outcomes and to raise the profile of community clinics in the health care field. In other instances the vision was emergent. The Eureka-Boston fellows took on a collective research project that laid the foundation for the launch and operation of the Massachusetts Nonprofit Network.

EXECUTE FOR SUCCESS



Because learning is not static, learning communities are constantly evolving. To set the stage for success, it is important to recognize the emergent nature of learning. This approach requires flexibility, responsiveness, openness, trust building and a commitment to providing the resources required for learning to take place and take root.

4 EMBRACE FLUID STRUCTURE

By closely listening to and gathering feedback from participants on an ongoing basis, organizers and facilitators can ensure that a learning community is responsive to participant needs. As a result, learning communities may have a fluid purpose, structure and participation.

One particularly fluid component of the structure is the level of expert-led versus peer-led learning. Injecting periodic expert input can help reinvigorate a group. Although participants have deep expertise in their own work, they may lack the technical knowledge and experience needed to resolve a challenge or bring new insights to their thinking. In such circumstances, trainers and technical experts can be added to the agenda. However, in other circumstances, a learning community might rely heavily on experts at the outset, but then reach a stage in development where it is more appropriate to be peer driven.

Embracing fluidity plays an important role when it comes to the ebb and flow of participation. Participant learning interests evolve, as does the time participants can dedicate to the community. In any group, some participants bring a high level of enthusiasm and energy, and others prefer to operate at the periphery — and participants may adjust their level of engagement over time. Rather than trying to bring peripheral participants into the center, successful learning communities find ways to create value for all types of participants and meet them where they are. At the same time, new members may join the group. In this regard, facilitators and organizers in the case studies were intentional in their outreach through pre meeting calls or webinars to help new members get up to speed and connected to the group.

One way to address participant ebb and flow is to provide a variety of learning structures — some mandatory and some optional — that cater to different learning needs and preferences, such as a combination of face-to-face and virtual meetings, real-time and offline interaction, action learning projects, site visits and training sessions. All of the case study examples offered an online component so that participants could engage remotely and at their own pace. If it's important to manage a learning community's ebb and flow, one option is for organizers or facilitators to develop a signed agreement that commits the group to a specific set of deliverables.

5 CREATE A SAFE SPACE FOR LEARNING AND RISK TAKING

When we seek to support learning communities that actually change practice, it is essential to create a culture of innovation and experimentation and establish a high tolerance for failure. Establishing trust and a sense of connectedness among participants is a critical first step.

Organizers and facilitators can set up a safe space for risk taking by openly acknowledging challenges and limits, encouraging constructive feedback and mining failures. They can also provide tools or frameworks, such as a self-assessment, to help the group navigate disagreements or tense conversations. For example, the Council of Michigan Foundations' Peer Action Learning Network used analytics tools and assessments to increase mutual understanding and defuse difficult conversations about race and diversity. To spark experimentation, Schools of the Future encouraged participants to try new approaches and to constantly ask, "How has this disrupted what you have done in the past? How have things changed?" Finally, when grantmakers are in the room with grantees we can make it clear that sharing a failure or challenge does not jeopardize funding opportunities.

Here are some indicators that a learning community is a safe space:

- Peers challenge and question each other in a way that is not perceived as threatening.
- Peers challenge or disagree with the funder or can request that funder representatives not participate in particular meetings.
- Peers are candid about successes and failures.
- Peers are eager to try new practices and feel comfortable seeking the support of the sponsor, organizer or facilitator in doing so.

“Being in a safe space means you are able to bring your full self and the full range of your experiences into the room without fear of negative consequences.”

Sylvester Jones,
Ruth Mott Foundation,
Council of Michigan Foundations' Peer Action Learning Network

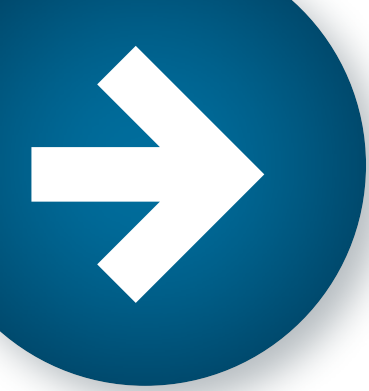
6 PROVIDE THE RESOURCES IT WILL TAKE

Learning communities can require a wide range of resources. And while some can run a learning community without significant funds, most learning communities will not thrive on a shoestring budget. The more ambitious the scope of the learning community, the more resources will be required. In most cases, sponsors should expect to invest in facilitation, small projects, research and the dissemination of learning. In general, the time frame for the learning community should be proportional to its objectives and desired outcomes. Learning can crystallize slowly, and change happens incrementally. The majority of the learning communities profiled in the case studies represented in this report were multiyear efforts.

RESOURCES LEARNING COMMUNITIES NEED

While this is not an exhaustive list, the following types of resources are typically involved in a learning community:

- Time (design, participant recruitment, checking in with individuals and facilitators and participation)
- Facilitation (identifying and hiring the right person with the right skills)
- Meeting space
- Travel
- Food and refreshments
- Research and documentation (commissioned research and evaluation)
- Technology (webinars, online discussion and knowledge-sharing platforms)
 - Dissemination (websites, communication materials, presentations at conferences and use of social media)



EXTEND THE SUCCESS

A learning community has the potential to deliver a range of possible outcomes, yet success is difficult to assess because of the community's emergent nature. To that end, grantmakers should stay attuned to what they are achieving, what's working and what can be improved on throughout a learning community's existence. Increased capacity for learning is often one unexpected outcome. It is built when participants put into place the practices for intentional learning, such as ongoing reflection, knowledge building and internal peer-learning groups. In addition, by providing support beyond the learning community structure, grantmakers can extend the learning into participants' organizations and help ensure that the learning community's outcomes are sustained over time.

7 BE OPEN TO UNANTICIPATED OUTCOMES

Learning communities create success in many forms — from building knowledge to changing practice. These results may not correspond directly with the initial vision, but they may yield unanticipated outcomes. Many of the learning communities in the case studies began with a theory of change in mind; others were open to the possibilities of a variety of results.

Across the case studies we found a range of markers of success beyond the desired learning objectives. Examples include:

- gaining visibility for the learning community;
- establishing participants' policy expertise;
- increasing social capital and building new relationships;
- expanding peer and resource networks and forging new collaborations;
- experiencing transformational learning and
- enhancing participant resilience.

We did not find a standard evaluation framework for learning communities. Often, because learning communities are part of a broader initiative, it is difficult to identify the discrete outcomes that can be attributed to the learning community. Nonetheless, the learning communities incorporated different forms of assessment in their work. The Council of Michigan Foundations' Peer Action Learning Network implemented baseline assessments and measured progress along the way. Others, such as one of the Wallace Foundation's education leadership learning communities, commissioned formal research to operate on a parallel track to the learning community to document learning and new knowledge.

8 PUT INTENTIONAL LEARNING PRACTICES IN PLACE

As noted, the community will often produce reports, guides and toolkits that codify the group's work and serve to further everyone's learning. Sometimes participants will also show increased ability to learn by creating parallel learning opportunities in their organizations or other professional contexts to feed forward insights and lessons from the original community. For instance, Schools of the Future participants created learning communities in their own schools. Teachers were offered support so that they could take time off to learn about other teachers' practices. As a result, teachers experimented with new projects and accelerated the pace of adopting new practices. The Community Clinics Initiative's participants used the online tool, The CCI Voice, to support newly developed habits of posting questions, starting discussions and engaging peers around topics of interest.

9 HELP INTEGRATE LEARNING INTO DAY- TO-DAY WORK

One positive outcome of any learning community is that participants take away new insights that often produce real changes in their work and lives. However, sometimes participants need help in applying their learning. And sometimes they need additional support outside learning community meetings and events to achieve the changes they seek. Organizers and facilitators can help participants anticipate potential challenges at their organizations and make themselves available to address such issues as they arise. Offering coaching and providing access to expertise and resources can help ensure changes are implemented in the participant organizations. In general, the bigger the change sought, the more support participants will need.

“ Learning about mistakes is just as important as learning about successes. When there were dead ends, this provided learning, as well. ”

Herrmann Spetzler,
Open Door Community Health Centers,
Community Clinics Initiative

CONCLUSION

Learning communities have the potential to yield transformative learning for both participants and the field. Built on a shared question or challenge, learning communities are a unique, action-oriented, collective and ongoing strategy to tap the wisdom of a group of stakeholders. To do so successfully, though, learning communities require intentionality in design and execution as well as resources and buy-in from participants. These ensure that the learning that emerges has a life beyond the learning community and has an impact inside participants' organizations and the broader fields in which they work.

To the latter point, the case studies illuminated several instances in which learning communities served as an effective grantmaking strategy to scale social impact. For example, when scaling impact through program replication, learning communities can be valuable forums for generating real-time feedback on what is (or isn't) working, exploring adaptations and codifying best practice. Because learning communities generate increased social capital and a sense of connectedness, participants are willing to leverage their resources, networks and relationships in collaboration. Through learning together, learning communities can accelerate the collective accomplishments of a group that is united in tackling a community-wide challenge.

Regardless of the approach to grantmaking, though, learning communities can amplify effectiveness. The emergent and peer-driven elements of learning communities make them dynamic platforms for connecting learning to action.

CASE STUDIES

EMBEDDED FUNDERS LEARNING COMMUNITY



The term *embedded funder* refers to place-based foundations that practice a strong community-oriented and relationship-focused form of philanthropy.³ The term originates from Chapin Hall, a research and policy center at the University of Chicago focused on improving the well-being of children and youth, families and their communities. In 2006 Chapin Hall invited the foundations it studied as part of its research on “embedded philanthropy” to form a learning community. When it was formalized in 2007, the Embedded Funders Learning Community consisted of 12 foundations involved in unusually intimate and long-term engagements within the communities in which they lived and worked. The vision was that participants would exchange experiences and delve into the details of their respective practices.



DESIGN

EFLC was made up of foundations with a range of sizes and forms — some religious based, some family foundations, some rural and some urban. The largest foundation had more than 10 times the resources of the smallest. Those interviewed said they believed this diversity to be a valuable element of EFLC. Participating members were of equivalent levels of seniority and responsibility — mainly executive directors and senior program staff.

The participants had a desire for concrete and tactical learning that went beyond a case study or panel discussion. According to Mikael Karlström, Chapin Hall’s project director for EFLC, “People wanted to focus on specific areas of practice and go deeper.” The group was interested in exploring the “how” of their work — how to navigate differences in power dynamics, community politics, policy changes and so on.

The participants took ownership of the learning community’s structure and designed the learning in a way that was relevant to their day-to-day work. The participants took turns hosting group meetings and focused on discussion themes identified by the group, such as community organizing, education reform, democratic engagement and community partnerships. In addition, they incorporated site visits so that the group would have firsthand exposure to a participant’s context, community partners and challenges.

3. Prudence Brown, Robert J. Chaskin, Ralph Hamilton, Leila Fiester, Mikael Karlström, Harold Richman, Aaron Sojourner and Josh Weber, “Embedded Funders and Community Change,” Chapin Hall at the University of Chicago, 2007. Available at www.chapinhall.org/research/brief/embedded-philanthropy-and-community-change.

According to Terri Bailey of the Piton Foundation, “When [the host foundation] nailed it, it was because they were grappling with the question as opposed to thinking that they had an answer to the question to demonstrate to us. Humboldt [Area Foundation] really exposed their bare bones to us. They said, ‘Let us share with you our struggle,’ and ‘This is where we are in the struggle.’ They were really grappling with a question and seeking help from the [learning] community.”

Chapin Hall used its research capabilities to support the group’s learning. It drew on past research, brought new research to the discussions and reflected the learning back to the group. According to Peter Pennekamp of the Humboldt Area Foundation, “Chapin didn’t come in saying, ‘Here is the data. This is what we know. Let’s study it together.’ Chapin came with ideas but not set ideas, and they were open to changing their ideas. They kept the hypothesis broad enough that it didn’t strangle the results.”



EXECUTION

Participation levels ebbed and flowed throughout EFLC’s existence. Although initially 26 foundations were invited to participate, about a dozen foundations formed the core group during most of EFLC’s five years of convening. Because EFLC was so participant driven, it required a significant investment of energy to achieve the intensity and depth of learning desired.

The duration of the learning community was determined by the value it generated for its members. When the core group dwindled to eight in 2011, those who remained felt that they no longer had the critical mass to sustain the style and intensity of meetings that had become the hallmark of this learning community. They chose to discontinue the learning community as a formal program and remain connected through one-to-one relationships and informal peer exchanges.



OUTCOMES

Like many learning communities, when EFLC started, its organizers and participants did not have a clear picture of outcomes beyond establishing a platform to share learning and practice.

One participant-identified outcome was EFLC’s ability to advance research on embedded funders. Participants thought that EFLC was effective because the group was creating new learning, not just exchanging learning that each member had arrived at on his or her own. The learning generated by the group was larger than the sum of its member learning. Bailey summarized: “[Chapin Hall researchers] were able to capture what we thought we were saying and thought we were doing and read that back to participants to further reflect upon. This was helpful — the codification and capturing of what was being discussed regarding the philanthropic community.”

EUREKA-BOSTON



After learning about Eureka Communities, a skill-building fellowship program that nurtures nonprofit leaders, Stephen Pratt, a nonprofit leader in Boston, wanted to bring the program to his city. As a result of conversations with Eureka Communities' founder, Deborah Szekely, and with seed funding from the Boston Foundation and the Barr Foundation, Pratt launched Eureka-Boston in 2001 to support collaboration, promote peer learning and address nonprofit executive burnout. Eureka-Boston was a recurring two-year fellowship program that built a sense of interconnection among executive directors and was grounded in principles of action learning. Building off of content from seminars and group learning, fellows worked independently and with the cohort to conduct small experiments designed to advance their work.



DESIGN

Fifty-six fellows participated in Eureka-Boston during its five-year existence. One of the criteria for becoming a Eureka-Boston fellow was being an executive director of a nonprofit for at least five years. The fellows were intentionally selected to ensure both affinity and diversity among organizations. The fellows complemented each other in terms of what they offered and the policy issues that concerned them. Yet the diversity supported a level of interdependence, whereby each participant had a unique contribution that would benefit the larger group. The combination of alignment and diversity created new linkages between participants' work and helped them use their networks to innovate. For example, members generously shared information on grant opportunities, introduced each other to prospective corporate partners and collaborated to deliver new programs to the community.

Participants had a strong collective identity. "We were close-knit even if you didn't know the other person. There was an automatic connection," said Christa Martinez, executive director of Dorchester Community CARES Coalition for Families and Children. This sense of connection sparked a bold vision for the group. When all of the fellows came together for a retreat in 2005, they decided to study the economic impact of community-based nonprofits in the state. The study found that the sector contributed \$2.5 billion in income to Massachusetts and provided a quarter of jobs in the state. The fellows grasped this opportunity to brand and promote the nonprofit sector as a whole, using their collective networks to make a public case that community-based nonprofits are the leading edge for economic development and revitalization in Greater Boston. This led to the creation in 2007 of the Massachusetts Nonprofit Network, a statewide organization to help strengthen these nonprofits so they can better carry out their missions. Several of the fellows are board members of the Massachusetts Nonprofit Network today.



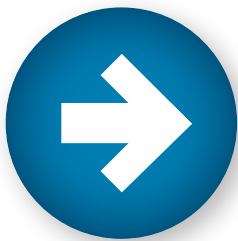
EXECUTION

Eureka-Boston consisted of four main pedagogical components, including a half-day seminar each month, an online repository for curricular materials, a weeklong study trip and a retreat at the end of each two-year fellowship with the previous cohort.

The fellows constructed individual and collective learning agendas. The participant-focused approach also supported the program's flexibility. Pratt opened each seminar by asking for any pressing issue that the group wanted to discuss. If someone had a challenge to present to the group, Pratt would adapt quickly. If no issues came up, he would proceed with the planned curriculum. In either case, the entire group exchanged experiences, shared stories and posed questions to one another.

Each month, fellows put their learning into action through small experiments in practice that they committed to carry out between seminars. For example, if the seminar topic was working effectively with the board, then the homework was to have conversations over coffee with three board members to discuss strategic priorities. At the next seminar fellows were expected to report on how their experiments went. The peers held each other accountable and actively supported each other in applying their learning to their work.

Pratt served as catalyst, organizer and facilitator for Boston-Eureka. As a nonprofit executive himself, he developed a curriculum that was relevant to the fellows. He also did not shy away from dealing with charged emotions, an inevitable dynamic among people experiencing high responsibility and burnout. According to Randal Rucker, CEO of Family Service of Greater Boston, "Steve provided a space for comfort and trust, a space to learn and exchange and to de-escalate, to be disappointed and be angry — all the emotions we tended not to share with boards and staff."



OUTCOMES

Part of Eureka-Boston's theory of change was based on leveraging fellows' individual networks and working collectively to make an impact. Eureka-Boston set out to address issues of burnout and to create a learning environment conducive to genuine collaboration. Looking strictly at those success measures, Pratt reported that fellows developed more resilience to burnout and continued to drive change at their organizations: "Fellows developed maturity and the coping skills to deal with crises at their organizations and at a personal level." As for collaboration, there are many instances of fellows connecting their work. For example, the head of a homeless shelter realized that shelters can be opportune spaces for providing parental education, and she joined with another fellow to form Families First to deliver that service.

One unanticipated outcome was the creation of a statewide nonprofit network. In effect, it was putting everything that the fellows learned into practice and creating a tangible extension of their collective learning work.

COMMUNITY CLINICS INITIATIVE — NETWORKING FOR COMMUNITY HEALTH



In 1999, The California Endowment and Tides launched the Community Clinics Initiative, a \$113 million collaborative effort to support community health centers and clinics through major grants, technical assistance and knowledge sharing, with the objective of improving health outcomes in underserved communities in California. In 2008, CCI launched the Networking for Community Health program to support California community clinics to connect and collaborate with local community-based organizations to provide more integrated and coordinated services. Central to NCH is a learning community for community clinics receiving grant support from CCI that is committed to building sustained partnerships with allies in its community and that works with local residents to build a movement to take action for community health.



DESIGN

The community clinics that receive grants through CCI's NCH program are the central participants in the learning community. The most recent cohort had 32 grantees. As a condition of the grant, grantees partner with organizations in their community to address issues such as community empowerment, health education and streamlining agency services. While grantee clinics usually serve as the experts in providing clinical care, their community partners bring complementary strengths, such as access to community groups.

Given NCH's commitment to building coordinated and integrated community services, the learning community's content is focused on collaboration to improve health outcomes. Thus, the learning community intentionally focuses on topics that are germane to clinics' day-to-day operations and the issues they face in implementing their grant projects while also connecting these daily realities to larger issues within the field. For example, peer-led discussion group topics have included creation and maintenance of successful partnerships, data collection and analysis, community awareness, and advocacy. The in-person gatherings are supplemented with webinars throughout the year on grantee-generated topics, such as establishing community gardens and working with local hospitals. This movement between small picture, big picture and field learning helps meet participants' practical needs while also providing a wider perspective on how community clinics can influence the broader field of healthcare.



EXECUTION

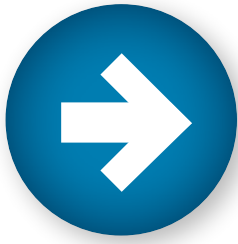
Two or three times a year, three participants from each funded project come together for a daylong convening that features a combination of expert speakers and peer-led sharing. Part of the day is also reserved for the invited experts to provide rapid technical assistance to small groups of participants.

In designing the operations of the learning community, CCI accounted for ample flexibility for its participants. For example, only the annual, conference-style convenings are mandatory. For all other smaller, in-person convenings and webinars, grantees have the freedom to choose whether to attend and whom to nominate for participation. This flexibility in choosing who will attend is especially powerful for smaller clinics and those in rural areas, as well as for certain types of clinic staff members (e.g., financial and operations personnel) who may lack peers within their organizations and rarely have opportunities to share ideas with others in similar positions.

CCI exercised similar flexibility when considering who should deliver content. For example, whereas the other learning communities shifted from expert-led to peer-led, the opposite occurred in the NCH learning community. Bob Moore, chief medical officer of Partnership Health Plan of California, commented, “The experts were great. They had a lot of fresh new material. In the clinic world we talk about a lot of ideas with peers at the same level, but it’s also good to have people outside your usual circle.”

An important part of the learning community has been an online platform that is part of CCI’s overall learning support strategy for the clinic field. The CCI Voice (www.ccivoice.org) is an online community that connects more than 2,000 clinic professionals throughout California as well as in other states. CCI staff members update the site continually with news and trends in the healthcare field as well as research and tools for users to download and use in their clinics. Grantees said the online platform is an essential tool for connecting peers in remote rural communities.

The long-term nature of the project and the fact that many of the grantees were previously part of other CCI programs helped build trust and eased the inevitable tensions that occur when grantees and funders share the same learning space. Given this context, grantees felt supported to learn from both success and failure, especially as they tested new strategies to improve health outcomes in their communities. According to Herrmann Spetzler, CEO of Open Door Community Health Centers, “Learning about mistakes is just as important as learning about successes. When there were dead ends, this provided learning, as well.”



OUTCOMES

CCI demonstrated a commitment to learning through visible and ongoing data collection in formal and informal ways. However, because the learning community was integrated with the larger CCI effort, disentangling the learning community accomplishments from those of the larger initiative is a challenge.

Participants' freedom to choose who and when to participate did not contribute to group bonding within the learning community due to the infrequency of interaction. Yet evaluations of NCH noted that this did not detract from participants' ability to be successful in their own work or from strengthening the collective identity of community clinics in the healthcare field.

An overall evaluative report of CCI, titled "Creating Currents of Influence: Success Factors for a Multifaceted Social Change Initiative,"⁴ points to achievements such as the creation of stronger, more integrated networks among clinics, greater attention from the philanthropic and public policy sectors and stronger field identity and stature for community clinics and their leadership. Before CCI, clinics tended to work in isolation from each other with few opportunities for learning exchange except at the executive director level. The learning culture of CCI opened up avenues for exchange and collaboration. Additionally, CCI did not initially intend to influence other foundations, but as it became an increasingly important information and intellectual resource for grantmakers working with community clinics, CCI enhanced the visibility and stature of community clinics among foundations.

4. Tides and the California Endowment, "Creating Currents of Influence: Success Factors for a Multifaceted Social Change Initiative," 2008. Available at http://www.careinnovations.org/uploads/Creating_Currents_of_Influence.pdf

COUNCIL OF MICHIGAN FOUNDATIONS — PEER ACTION LEARNING NETWORK



The Council of Michigan Foundations initiated the Peer Action Learning Network in 2010 as part of the Transforming Michigan Philanthropy Through Diversity and Inclusion initiative, which seeks to increase the effectiveness of organized philanthropy in Michigan. CMF began to address diversity issues in 2001, and in 2002 the board adopted a resolution making diversity an organizational value. A planning grant from the Kresge Foundation enabled CMF to work at a broader and deeper level to address diversity and inclusion — leading to the launch of PALN. The goal of PALN is to strengthen participant organizations' capacity in diverse and inclusive leadership, management and grantmaking, in addition to establishing a group of early adopters who can lead the philanthropic community. Participants consist of high-level staff members, including CEOs, of Michigan foundations and nonprofit organizations committed to becoming more diverse and inclusive. CMF is currently recruiting a third cohort, which will begin in late 2012.



DESIGN

When planning for PALN, CMF's staff worked to ground the program in the current reality of Michigan philanthropy. For example, they commissioned baseline research about foundation policies on diversity and inclusion; conducted a landscape scan providing input from select foundation leaders and national experts; and completed a demographic survey of Michigan foundation staff, trustees and members of community foundation youth grantmaking committees.

Including the 2012 cohort, a total of 10 organizations have participated in PALN. "The organizations are radically different," said Vicki Rosenberg, director of PALN and former vice president for education, communications and external relations at CMF. "They include community, corporate, family and independent foundations and two nonprofit associations. And yet the common ground is palpable. They all share a good intent and openness for being in the same room and sharing with others."

Each organization has a team ranging in size from four to seven staff members including CEOs, executive staff, human resources staff, communications staff, executive assistants, program officers, and for one organization, the board chair and trustee. A team of participants from an organization is important because it helps to create buy-in for change.



EXECUTION

Six expert-facilitated, one-day seminars form the core of the PALN. In addition, there is a CEO-only peer learning group that meets over lunch during the seminars, forming a “learning community within the learning community” for those leading organizational change. Finally, CMF created a website for access to curricular materials and a customized toolkit to extend learning to nonparticipating staff from participating organizations.

PALN takes a developmental approach to learning. Every individual completes an assessment of intercultural competence at the beginning of the program. It serves as a baseline for understanding where the participating individuals, teams and their organizations stand on a spectrum of intercultural competencies. Moreover, at the organizational level, everyone on staff at a participating organization takes the assessment, and the results are discussed with the team. In addition, the organizations can contract with Beth Zemsky, co-facilitator and co-lead designer of the PALN curriculum, to provide individual feedback sessions. The assessment also helps to create a safe space for difficult conversations by providing a framework for common understanding about the issues. In the first two cohorts, initial surprise about the results gave way to new understanding about what it takes to create an inclusive and equitable environment.

The team from each participating organization devises and implements an action learning project that is meant to advance diversity and inclusion at the team’s organization. For example, the Grand Rapids Community Foundation team decided to establish the individual and organizational cultural competencies in order to become as a community model of a racism-free organization as determined by Partners for a Racism-Free Community credentialing. After a long and arduous process, and failure to pass in the first round, the foundation became the second organization in Grand Rapids to acquire the credentials.



OUTCOMES

CMF staff and the facilitators meet every other week to assess what is working and what needs adjustment in the learning community. This form of just-in-time learning and improvement enables program organizers to make modifications without having to wait for the completion of a formal evaluation.

CMF commissioned an interview-based evaluation with six participating organizations to assess what, if any, impact the learning community was having. The evaluation found that participants communicate differently in their personal and professional lives thanks to PALN and documented a deeper understanding of the complexities of intercultural competence. In additional interviews, participants shared that they have adopted new frameworks for screening incoming proposals as a way to become more inclusive in their grantmaking practices, used frameworks from the seminars for their staff retreat and had two members of the PALN team act as co-facilitators, reconstituted membership committees and created a task force that focuses on new forms of philanthropy. Meanwhile, foundation teams also appreciated their new ability to engage in difficult conversations in a mindful yet direct way that is “not walking on eggshells.”

SCHOOLS OF THE FUTURE — COMMUNITY OF LEARNERS



Created in 2008, Schools of the Future is a five-year, \$5 million capacity-building initiative designed to encourage and mobilize schools to transform their learning environments and teaching strategies. Funded by the Hawai'i Community Foundation and managed by the Hawaii Association of Independent Schools, SOTF is a response to concerns from leaders in the field of education that the current model of school instruction does not offer the type of collaborative learning environments that position students for success in a globalized world. While SOTF provides a variety of supports to address this, such as professional development training for teachers and technology infrastructure upgrades for schools, a critical component of SOTF has been the learning community that formed from the cohort of funded schools. Within the learning community, participants share their experiences in trying out new instructional methods and how to make their own learning more widely available to the field.



DESIGN

SOTF was created to support education leaders in adopting new learning environments, professional development programs, teaching strategies and technology so that their schools can be transformed into 21st century institutions. SOTF's learning community consists of project teams from each of the schools awarded grants by the Hawai'i Community Foundation. SOTF selected schools for the five-year initiative specifically for their potential to transform themselves.

Each school creates a project team that includes one or more of the following stakeholders: teachers, school administrators, department chairs, technology coordinators, students, specialists (e.g., reading specialists), board members and community members. Having more than one participant from each school take part in the learning helps to generate the momentum needed to make changes and achieve buy in from key stakeholders back home.

Part of SOTF's success is using peer exchanges to meet participants where they are in terms of readiness for change. As Lou Young, head of schools at Academy of the Pacific, shared, "Being part of the SOTF Community of Learners gave us a chance to see that the things people were trying were very innovative, very exciting and sometimes almost overwhelming. At the same time, seeing what other schools were doing made us realize that what others were doing was pretty easy. We learned that you didn't need the most innovative idea right out of the gate... In fact, you could start small and even fail, it was okay."



EXECUTION

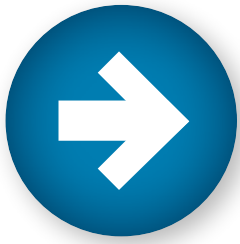
The SOTF learning community employs a variety of engagement methods, including an annual study tour, quarterly in-person convenings focused on peer sharing, webinars, a Ning social network (<http://futureschools.ning.com/>) and opportunities to hear from experts about innovative learning practices and how to apply them.

The annual study tour, in particular, is a unique opportunity to provide participants with exposure to new teaching methodologies as well as practical examples of how to employ them. Together, teams from all of the cohort schools visit institutions that exemplify 21st century learning practices. In the summer of 2009, just after the initiative was launched, the Hawai'i Community Foundation sponsored a field trip to High Tech High School in San Diego, a renowned charter school. Inspired by that experience, most participants cited project-based learning as a key component of the SOTF grant in the 2011 evaluation of the program.

SOTF also encourages experimentation and risk taking by using protocols, sometimes called *critical friends groups*, to guide professional peer learning. In critical friends groups, peers ask provocative questions, provide a fresh perspective and offer critiques. Critical friends take the time to fully understand the context of the work presented and the outcomes that the person or group is working toward. The friend is an advocate for the success of that work. This strategy is most successful when the person or group seeking feedback is completely open about both progress and challenges.

In addition, many of the schools created school-specific learning communities comprised of faculty, staff, students and parents to tackle specific initiatives and support the adoption of innovative practices. Mary Girard, dean of faculty for high school at Sacred Hearts Academy, commented, "I've found that the only way to create change is to have people be a part of the process. As a SOTF school, I wanted to model the change we sought to implement."

As SOTF enters its fourth year, its organizers remain mindful of the need to let its tools evolve over time. This takeaway is particularly salient when it comes to the learning community's Ning network. In SOTF's first several years the Ning network was a central component of the initiative by providing participants with a 24/7 place to ask questions of the larger group, participate in discussions and share knowledge. But as the participants became closer over time, they increasingly found each other on Facebook and migrated many of their discussions there. As Dr. Phillip Bossert, director of the Institute for 21st Century Teaching and Learning at the Hawaii Association of Independent Schools, shared, "Since Facebook was someplace most of them were already hanging out on a daily basis, creating a variety of virtual mini-communities of learners was a natural migration." Although the traffic to the Ning network is declining, the traffic on the Facebook pages continues to grow and will likely survive the end of the funded initiative much longer than the Ning network.



OUTCOMES

SOTF's accomplishments include changes in participating schools' instruction and curriculum, spanning the gamut from minor reforms to transformative change. In addition, many schools have reported a marked increase in student engagement in learning. The learning community helped to accelerate the change process at schools by providing space for innovation, experimentation and peer learning.

Overall, SOTF increased the learning capacity of schools. Participants have reported increased, valuable teacher-to-teacher feedback as well as cross-departmental and cross-school exchanges. The success and vitality of the community can be measured by the type and frequency of learning exchanges that it spurs among schools, which are critical for change in practice within schools. Participants have taken it upon themselves to multiply spaces for learning within, between and across schools. Half of the schools used the professional development budgets from their grants to allow their teachers to visit peers at other schools and observe classes, while also providing substitute teachers while their teachers were away.

THE WALLACE FOUNDATION'S EDUCATION LEADERSHIP PROFESSIONAL LEARNING COMMUNITIES



In 2000, the Wallace Foundation launched a 10-year school reform initiative to support states and school districts to develop and improve leadership by principals and other key figures. Wallace's strategy is to craft and test possible solutions, commission research and evaluation and share knowledge broadly about what does and doesn't work. A few years into the initiative, Wallace recognized that its funded states and districts were grappling with similar issues and could benefit from connecting with one another. Simultaneously, they realized that the education research community was not keeping pace with what was happening on the ground. Over the course of 10 years Wallace brought its grantees together to form multiple learning communities based on different issue areas to address the gap between research and practice. As a way to complement and inform the learning communities' work, Wallace also commissioned longer-term research projects based on the topics that the groups were tackling.



DESIGN

Wallace's learning community model included networking, large group engagement and action research work. Wallace assembled multiple learning communities based on the grantees' scopes of work, assigning grantees to relevant groups. The learning communities consisted of 12 to 15 participants and brought together grantees at the state and district levels with partner organizations and commissioned researchers. In addition, Wallace took care to ensure that within each community there was diversity in the experience of participants — some of whom were “exemplars” and some of whom were newer to the work. The groups tackled a range of issues — from improving practice and influencing policy through using data to assessing leader effectiveness. Grantees could participate in more than one group.

Each group identified specific issues it was struggling with in real time and designed an action research project with an articulated deliverable. Academic researchers provided periodic input. According to Jody Spiro, director of education leadership at the Wallace Foundation, “The professional learning community should not be an add-on to what grantees are already doing. We always say to them that ‘if the PLC [professional learning community] work is not directly related to what you're trying to accomplish then let's stop doing it and go on to something else that is.’ ”

In subsequent years, there was also a noteworthy shift in the communities' focus to scaling strategies and sustaining participants' projects and initiatives (e.g., leadership academies and mentoring tools).



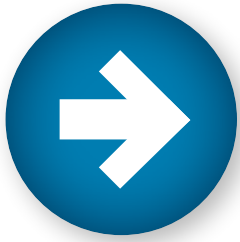
EXECUTION

The learning communities incorporated a variety of learning structures, including: periodic group meetings to advance projects; biannual, two-day, in-person meetings; webinars; moderated online discussions and an online platform for document sharing. In an effort to seed the group with new thinking from outside perspectives, the learning communities included expert speakers in addition to peer learning. Participants also had the opportunity to meet with other learning community participants at national meetings that focused on shared policy interests and included supplemental research provided by issue experts. To minimize ebb and flow in participant engagement, all participants signed a compact with Wallace that outlined their commitment to participate fully in the learning community, do the work required and attend all the meetings.

The foundation was committed to providing the resources needed for the learning communities to flourish. Each learning community was assigned a “resource facilitator” who brought expertise on the topic and helped keep the group on track. Both Wallace and grantees found the facilitators invaluable to the process. The facilitators were critical in holding each person to his or her commitment, connecting the members’ assigned tasks and giving the group an overall sense of mission. When they were at their best, facilitators helped bring out everyone’s perspective. The facilitators formed their own learning community of sorts. They met periodically among themselves and with Wallace staff to discuss how their groups were doing and to share progress and challenges.

The duration of the learning communities helped to solidify relationships between the funder and the participating grantees. Wallace’s relationship with its learning communities was notable for the level of trust and an authentic perception of partnership between funder and grantee. The foundation’s commitment to active learning alongside grantees also engendered trust. Participants reported feeling comfortable discussing failures and challenges. “We tried to set up the [learning community] as a safe space, focused on common problems, where people felt supported in bringing issues and receiving resources, advice and, yes, even more questions,” Spiro said.

Once the learning communities began their work, each one was expected to address an important problem by developing a product that could be prototyped, fine tuned and scaled up through the network of communities. The network served as a critical friends forum through which the project teams shared their works in progress and received feedback and questions, which they used to make consequent revisions in approach and content. The resource facilitator and online platform further supported the innovation and dissemination process by enforcing accountability and cross-group engagement.



OUTCOMES

The learning communities set out to draw lessons for the field while advancing grantees' own work to sustain their efforts to improve school leadership. For example, Wallace's work with learning communities resulted in several new tools and programs still in use in numerous states and districts as well as sustainability plans for grantees' work that have resulted in the successful continuation of more than 80 percent of the grant-funded work even after Wallace funding ended.

The learning communities also generated new solutions that were scaled across grantee networks. For example, one learning community worked on leadership performance assessment and studied state standards adopted by Kentucky, Delaware and other states. Based on that analysis, they developed the Leadership Performance Planning Worksheet, a new tool focused on leadership behaviors that principals and their mentors can use. The tool is now used by a growing number of states and school districts across the country to support and promote growth in school leadership.

APPENDIX

SUMMARY OF LEARNING COMMUNITY CASE STUDIES

	Embedded Funders Learning Community	Eureka-Boston	Community Clinics Initiative — Networking for Community Health	Council of Michigan Foundations — Peer Action Learning Network	Schools of the Future — Community of Learners	The Wallace Foundation — Professional Learning Communities
PURPOSE	To exchange experiences and delve into philanthropic practice	To build a community of committed and networked nonprofit leaders who can combine their efforts to tackle persistent social and public problems	To support and strengthen California community clinics' networking and knowledge-sharing efforts	To strengthen participant foundations' capacity in diverse and inclusive leadership, management and grantmaking	To share experiences in applying innovative approaches to school learning and to share knowledge with the field	To support grantee just-in-time learning and to lift lessons for the field of education about school leadership
TIMING	2006 – 2011	2001 – 2005	2008 – 2012	2010 – present	2008 – present	2005 – present
COMMUNITY	12 to 15 small foundations identified by the University of Chicago's Chapin Hall as embedded funders	56 executive directors of Massachusetts nonprofits	32 community clinics awarded grants by the Community Clinics Initiative and their partners in the health care safety net	CEOs, senior staff and trustees of eight Michigan foundations and two associations committed to becoming more diverse and inclusive	Mostly teachers, from 18 Hawaii independent schools that have been awarded grants from the Hawai'i Community Foundation	Wallace grantees from states and school districts and representatives of various professional associations; currently, about 65 members
MODEL	Peer exchange, with researchers documenting learning	Fellowship with a networking and collaborative framework	Peer exchange, with some expert input and action projects	Training with action projects at each organization and coaching sessions	Peer exchange, with periodic expert input; schools create their own internal learning communities as well	Peer exchange, with project-based action learning in teams and researchers working in parallel
IMPACT ACHIEVED	Peers adopted and adapted practices from each other, and they disseminated their models and approaches through research	Learning community morphed into the first Massachusetts nonprofit association, a policy-setting organization	Peers are contributing to public health policy and to community garden projects that other peers have adapted in their contexts	Peers are informing and supporting policy on diversity and inclusion in Michigan philanthropy	Peers are adopting and adapting practices from each other as well as disseminating knowledge about innovative school pedagogies	Action groups scaled their tools across the country, disseminated influential knowledge in the field about education leadership and informed policy forums

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