



**Best Practices in the Design  
and Implementation of  
Learning Communities**

**SUBMITTED BY:**

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# Best Practices in the Design and Implementation of Learning Communities

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## INTRODUCTION

Over the past decade, national foundations and the federal government have designed many multisite initiatives that seek to address complex social problems. These initiatives have spanned many fields, from criminal justice to early childhood education to community development and health. In addition to providing sites with funding and technical assistance, a number of these initiatives have included some type of cross-site convening within the design, often referred to as “learning communities.”

The Robert Wood Johnson Foundation (RWJF), as part of its portfolio dedicated to catalyzing demand for healthy places and practices, is designing an initiative in which the learning community is not a supplemental part of the intervention, but the focal point of the work. The intent is to create a platform for knowledge sharing, team building, and networking for cross-sector community teams that are working on a range of strategies related to the culture of health. To inform the design of this work, RWJF asked Mt. Auburn Associates to research how similar types of learning networks, or communities, have been designed, the challenges others have faced when implementing this work, and what have been some of the best practices in terms of building team cohesion, strengthening the capacity of the stakeholders involved in the work, and sparking new and creative thinking.

This research began with a focus on multisite learning communities that had the following characteristics:

1. teams of individuals from multiple communities are convened to address a specifically defined problem or opportunity;
2. there is an intentional learning agenda with clear expectations about results;
3. the learning is being applied to problems currently being addressed by participants;
4. participants are learning from each other;
5. the format involves multiple in-person convenings as well as other potential platforms for learning and communication; and
6. the focus is on facilitating and catalyzing learning rather than on providing training.

The methodology for the research involved a literature review and interviews with practitioners who were involved in the design, implementation, and evaluation of learning communities.

As the work evolved, a number of challenges emerged:

1. **Limitations of the literature.** While funders who are supporting multisite initiatives increasingly are using some form of grantee convening to support capacity building, peer networking, and the alignment of site work with initiative goals, the actual literature that specifically discusses best practices in the design of learning communities that involve multiple site teams is very limited. Although there are numerous evaluations of multisite initiatives, few focus on evaluating or discussing the funder interventions such as learning communities. However, there is considerable tacit knowledge in the area, with intermediaries, consultants, and foundation staff who have designed and run various types of grantee convenings having developed a body of knowledge about best practices and challenges.
2. **Boundaries for the research.** There is an extensive literature on many different aspects of organizational learning that has some relevance to the design of multisite learning communities. In addition to “learning communities,” this literature uses a variety of terms to describe different types of engagement and convenings, including “communities of practice,” “knowledge networks,” “learning networks,” and “learning exchanges.” While these forms of organizational learning are being applied to both *intraorganizational learning* and *interorganizational learning*, Mt. Auburn researched studies and individuals who were applying it to work with multiple organizations and did not look at the extensive literature on building teams or learning networks within individual corporations or organizations. In addition, the research excluded interorganizational networking that did not focus on learning and interorganizational convenings and training focused solely on leadership development.
3. **Relevance to the social sector.** Much of the literature on organizational learning focuses on the private sector and looks at the purpose, the components, and the design elements that support knowledge and learning through both formal and informal networks. The literature on the use of various forms of interorganizational learning in the social sector is much more limited.

Given these challenges, the findings in this report emerge primarily from the interviews with 15 individuals who have had experience in designing and implementing learning communities and communities of practice and individuals involved more broadly in the field of interorganizational learning. (See Appendix A for list of interviewees.) In an effort to get the “user” experience, Mt. Auburn conducted a couple of additional interviews with individuals who were participants in multiple learning networks. While the challenges noted above limited the relevance of the literature, insights from some key studies on a variety of types of learning networks also informed the findings. Appendix B contains a bibliography of the most relevant literature.

## FINDINGS

The following provides the findings from the interviews and literature review in six areas:

- the goals of the work;
- who is involved;
- how learning communities are managed;
- how convenings are designed and implemented;
- other supports and platforms that extend the work; and
- how results are measured.

### Identifying the Goals of the Work

✓ **Intentional design and clarity about intended outcomes are critical to success.**

The work Mt. Auburn reviewed for this memo spanned a wide variety of learning and networking activities. In all cases, the outcomes were related to the application of the learning to the work that participants were undertaking within their organization or within their community. The specific theory about how the convenings would contribute to outcomes, however, differed across the work, with the networking activities seeking to achieve one or a number of the following goals:

- *Building effective cross-sector teams within a community.* Learning communities that involved bringing teams of stakeholders from a community together with teams from other communities was a common practice for philanthropic and federal multisite initiatives. In these learning communities, one of the explicit goals usually is related to community team building. This requires providing time for teams to work together on a defined project or problem and supporting learning related to collaborative practices.
- *Learning across teams or across leaders with similar work.* All of the efforts Mt. Auburn reviewed for this memo involved and highly valued peer learning. The degree to which this was the focal point of the convening, however, did differ. In efforts that are defined more as “communities of practice” or “learning networks,” the entire focus is on facilitating and supporting peer learning among participants involved. In learning communities involving multiple teams of community stakeholders, the assumption is that learning and networking across the teams are also critical to accelerating learning.

“Considerable research shows that unless goals are clearly stated and agreed upon, networks can easily lose energy and underperform.”

Karen Pugh and Laurence Prusak, *Designing Effective Knowledge Networks*

- *Catalyzing innovative solutions to complex problems.* Learning communities can have as a goal catalyzing innovative approaches either at the site level or at the field level. In either case, supporting new thinking and creative approaches is an important outcome of the work. To achieve these goals, some interorganizational network convenings incorporate design thinking as a tool. In addition, a distinct type of network convening, referred to as “design labs” or “innovation labs” (see sidebar), seeks to accelerate learning among a group and to catalyze solutions and effective implementation. These efforts require careful consideration of who is involved, with learning usually focused on a very specific outcome.
- *Supporting field learning and field building.* Often the “sponsors” of a learning community have a broader agenda than just reaching the participants. They are hoping that participants will capture and disseminate the learning emerging from the convenings more widely to influence the field. Also, the expectation that the participants will help to build a constituency advocating for specific policy or system changes identified through their work both within their own community as well as more broadly in the field is a second potential goal related to field building.

### Social Innovation Labs: Generating Innovative System Solutions

The Rockefeller Foundation has been supporting a different type of learning network, focused on addressing complex social problems through social innovation labs. Rockefeller has used these labs as a strategy for exploring areas of interest where it wants to advance new innovative thinking. It sees Social Innovation Labs as having three defining features: 1) drawing on diverse perspectives from across and within a system; 2) having an innovative mindset involving “learning fast, trial and error, and co-creating solutions”; and 3) involving collaborative problem solving among participants.

Rockefeller has now funded six labs on various complex social problems. It has found that the labs provided the incentive and motivation for people to have different conversations than they are used to having. As part of these labs, Rockefeller invites one or two people from about 15 different organizations, representing a diversity of sectors. This group often meets multiple times over the course of a year. Rockefeller has found that the labs have been an effective platform for building teams and learning, leading to catalyzing innovative solutions with more rapid implementation.

While most learning communities involve some or all of the above goals, in practice, these goals are often implicit in the design. A number of individuals interviewed noted that it would have been more helpful if they had thought about these specific goals upfront and made it more of an intentional part of their design. Each of these goals will lead to different decisions about whom to engage, how to engage them, and the content of the work.

- ✓ **While intentional design is important, it is also important to be flexible and adaptive as the work evolves.**

While many of those interviewed cited the importance of designing learning communities more deliberately to achieve the intended goals, there was also the recognition that over time the issues that are most compelling to the group may emerge, or the overall goal of the learning community may shift. It is important to be able to pivot and rethink the agenda as well as the overall learning outcomes over the course of the work.

The literature also supports this finding from the practitioner interviews. In its analysis of the GROOVE Learning Network, a USAID-supported initiative involving four leading development agencies, USAID concluded that learning networks are dynamic groups and, as such, their needs and focus may shift over time.<sup>1</sup> It suggests that it is important to step back and reconsider if and how the focus of the group is shifting and be able to change the learning agenda or reorient the grouping of participants as the work evolves. Similarly, in their analysis of federal learning networks, Briggs and Snyder also discuss what they call “quasi-evolutionary development,” a process that involves both conscious design and organic evolution.<sup>2</sup>

✓ **It is important to have a common framework and clarity about language upfront.**

Most individuals and organizations that are coming together in any learning network or convening are often coming to the work with different vocabularies and are often working within different frames. One of the greatest challenges in creating a learning community is to develop a common lexicon and to at least be clear about any framework that is core to the work from the sponsor’s perspective.

Learning communities that are part of a larger initiative often have greater clarity about the theory of change that is guiding the work, and often share this understanding with the participants. In these cases, the initiative itself might have a commonly understood framework that grantees have already integrated into their thinking. Examples of specific frameworks that are the foundation of some of the multisite initiatives reviewed include results-based accountability, adaptive leadership, collective impact, system thinking, and racial equity and inclusion. When the learning network or community is independent of a larger initiative, it is critical that there is a commitment of time early in the process or prior to the first convening to define any particular frame that is guiding the work.

Interviewees provided the following suggestions to ensure that there is clarity about the frameworks, the broader theory of change, and the language that is being used over the course of the work:

- *Have a compelling framing question for the initiative overall and for each convening.* This framing question needs to be compelling to those invited and not so fuzzy or general that anything would apply.

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<sup>1</sup> QED Group, LLC, (2013). *Practices of Successful Learning Networks: Documenting Learning from the GROOVE Learning Network*. [online] U.S. Agency for International Development. Available at: [https://agrilinks.org/sites/default/files/resource/files/Practices%20of%20Successful%20Learning%20Networks\\_Aug2013\[1\]%20Copy%20Copy.pdf](https://agrilinks.org/sites/default/files/resource/files/Practices%20of%20Successful%20Learning%20Networks_Aug2013[1]%20Copy%20Copy.pdf) [Accessed 3 Nov. 2015].

<sup>2</sup> Snyder, W. and de Souza Briggs, X. (2003). *Communities of Practice: A New Tool for Government Managers*. Collaboration Series. IBM Center for The Business of Government.

- *Ensure that participants understand the goals of the initiative from the sponsor's perspective.* In the early convenings, it is critical that the sponsor or intermediary implementing the learning work provides those attending with clarity about the goals and theories that are guiding their work.
- *Identify and explain some of the core frameworks and language at a very early stage in the work.* The initial learning community should set out clearly definitions of terms that will be used throughout the convenings and ensure that there is common understanding. Similarly, if the initiative is using a framework or specific tools that will form the foundation of the work, it needs to define this upfront. If there are transitions in membership over time, it is important that the intermediary or sponsor makes these core elements part of a briefing for any new members prior to attending a later meeting.

While using a common language across the network is helpful, there were also some cautions about being overly orthodox and prescriptive about tools and frameworks. Once a framework begins to be held as the only way to address a problem, it can be detrimental. As one of those interviewed noted, a common framework *“is really helpful until it is not.”*

## Deciding Whom to Involve

- ✓ **Most of those interviewed considered a relatively small cohort as optimal.**

In general, those interviewed noted that the larger the number of individuals involved in a convening, the more difficult it was to keep the convening from feeling like a more traditional conference. There were also concerns that given the importance of building trust and connections among those involved, the larger the number of groups or individuals involved, the more difficult it would be to build the relationships needed to ensure openness and to promote exchanges.

While some thought it would not be possible to create a sense of trust and facilitate deep peer exchange with more than 20 teams (some actually thought 10 teams would be the maximum) or more than about 100 participants, others felt that with sufficient resources and very careful design it would be possible. Specific ideas for larger groups included:

- *Create cohorts within the larger group that engage in some type of learning activities between convenings.* This could include affinity groups interested in specific strategies; who come from the same sector or type of organization (i.e., philanthropy, finance, etc.); or who are in the same role (i.e., coaches, executive directors, healthcare providers, etc.).

*“Organizing a learning community is like planning a dinner party: what is the proper mix of people (who may well be interacting for that first time) that would lead to a worthwhile experience for all?”*

**Jack Chin, *The Power of Learning: Funders and Grantees Getting Smarter Together***

- *Support optional site visits, allowing smaller groups to travel together and explore how other communities are addressing similar challenges.*
  - *Ensure that there are sufficient resources so that there will be enough facilitators and staff to have breakout sessions and support for a large number of subgroups throughout a convening.*
  - *Balance large convenings with smaller regional convenings multiple times a year.*
  - *Have peer exchange calls that have a maximum of 20 people in between convenings to help create “pockets of trust” within larger learning cohorts.*
- ✓ **A sufficient level of commonality across the teams is essential to create shared learning and effective networking.**

While there were a variety of opinions on how important it is to have teams that are similar across most dimensions versus the benefits of some diversity, the interviews and literature suggested that some minimal level of commonality is required to promote peer learning.

In learning communities that involve teams from multiple cities or regions, there are benefits to grouping like communities together. Individuals who have been engaged in convenings noted that when there is too great a difference in terms of community size, market conditions, or level of urbanism, it may be more of a challenge to develop deep peer relationships. For example, someone from Chicago who was part of a convening that involved a very diverse range of communities felt that he was facing different challenges from the small and mid-sized cities he was engaging at the meetings, and expressed frustration that there were no other participants from a large U.S. city. One of the interviewees involved in running learning communities as part of a large multisite initiative felt that diversity was okay as long as each community had at least one “buddy.” In other words, if there was only one weak market community and everyone else was from a strong market city that may present a problem.

**“Learning community designers need to develop the right balance of heterogeneity (to stimulate creative exchange) and affinity (to maintain group cohesion).”**

**Jack Chin, *The Power of Learning: Funders and Grantees Getting Smarter Together***

Involving teams from very diverse types of communities was less of an issue the more specific the problem or framing question was for the work of the learning community. For example, if everyone involved was developing new approaches to creating more environmentally sound water systems or was addressing ways to better engage the business community in a workforce



effort, the focus was specific enough that having many different perspectives through a diversity of types of communities and types of stakeholders was seen as a positive.

Beyond the types of communities represented, there are many other issues related to the level of commonality among participants in the learning community. These include commonalities in perspective, in the types of organizations represented, and in terms of the level of leadership or authority within and across teams. Again, the general perspective is that some level of commonality across each of these dimensions is important to the success of a learning community.

The literature also provides some perspective on this issue. While much of the literature also finds that there has to be some minimum level of commonality among participants, the importance of having sufficient differences so that there is some “disruptive thinking” and multiple perspectives was also noted. For example, the study on learning communities completed by the Research Center for Leadership in Action for Grantmakers for Effective Organizations reviewed numerous learning communities and concluded that it is important to balance commonality and diversity in the backgrounds and expertise of members. According to this study, *“Maintaining diversity in the perspective and expertise of members was a recommendation that consistently came up in all of the cases.”*<sup>3</sup>

✓ **The composition of each team is an important consideration, though there are dangers to being too directive.**

Efforts that included multisector teams all reported that the size and composition of the teams invited to attend a convening are important. In terms of size, the most common range of each team was between four and six individuals.

In terms of composition, the most important questions to ask are “what needs to be learned by whom” or “who is most essential for the community to achieve its results.” Most believed that it is critical to achieve a balance between being too directive about who can attend the convenings and being so flexible that there is little commonality across sites.

One of the most common methods the sponsor or intermediary used to build appropriate teams was to create categories for the team composition and then leave it to the sites to decide whom would be most appropriate to include. (See sidebar.) Others thought developing very specific criteria for a range of characteristics was important, for example, suggesting that sites only include individuals who were decision-makers versus implementers. Another approach was having the sponsor be very directive about the characteristics of the core team,

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<sup>3</sup> Research Center for Leadership in Action, NYU Wagner, (2012). “Executive Summary.” *The Power of Learning: How Learning Communities Amplify the Work of Nonprofits and Grantmakers*. Grantmakers for Effective Organizations.

but allowing each site to invite a couple of additional individuals to each convening based on its needs and the topics being discussed.

The one thing that is critical, however, particularly if team building is a goal, is that each team is responsible for inviting stakeholders from its community. Examples in which the sponsors of the learning communities decided whom to invite and sent out the invitations led to many challenges. In these cases, those who were leading the site work sometimes did not consider individuals attending the learning communities to be important stakeholders.

It is also important to be flexible about changes in the group. Sometimes it does not become totally clear about who should attend until after the first or second convenings. To account for the emerging nature of the work, some of the learning communities begin with a smaller core group and then grow the team as the work evolves. Or, there is a small core team involved throughout, but there are supplemental stakeholders from each community invited depending upon the specific topics or purpose of later convenings.

✓ **Consistency of participation of team members over time is optimal, but often difficult to achieve.**

While consistency over time in terms of who attends the meetings is important, the realities make this difficult. For example, as previously noted, sometimes whom the appropriate participants should be is not entirely clear in the beginning. In addition, some inconsistency is related to people who had left their positions or who had conflicts with the date of a specific convening.

In cases where the learning community was part of a larger initiative involving substantial grants, it was easier to encourage consistency across meetings, with participation being part of the grant agreement. Beyond grant agreements, other tools that groups used to promote greater consistency in participation included:

- *Have sites and each team member sign a memorandum of understanding outlining the responsibilities of the team as a whole and each of its members. This might include having a set goal for attendance over the course of learning communities.*

### Building a Team: The REAP Approach

The purpose of the MIT Regional Entrepreneurship Acceleration Program (REAP) is to help regions accelerate economic growth and job creation through innovation-driven entrepreneurship (IDE). The initiative involves inviting regions to form multi-disciplinary teams that engage in four two-and-a-half-day convenings over a two-year period. The goal of the work is to help partner regions build and implement a customized regional strategy for enhancing their IDE ecosystems.

REAP has developed a very deliberate and proscribed approach to the composition of the teams it engages. It looks for teams of between five and seven participants and requires that five are designated from specific sectors (i.e., government, risk capital, universities, entrepreneurs, large corporations). There are also two optional slots to allow for some flexibility. It also requires that one individual on each team be designated as a team facilitator, and is specific about the characteristics of team members, suggesting that the level of leadership *“should be such that they carry enough influence to make things happen and catalyze action.”*

- *Sign an agreement with each team and have the team pay a small amount to participate in the convenings.* If the team meets the agreement, the initiative would return the funds.
- *Enforce a policy of no substitutions.*
- *Charge some level of tuition for overall participation.* There are many examples where teams are asked to pay to participate. This is particularly true in the private sector, but there are also examples of academic institutions that charge “tuition” for participating in a series of learning convenings. Some felt there would more likely be consistency if the teams had “more skin in the game.”

Even with these tools, it is anticipated that membership will change over the course of the work. Noting this inevitability, the USAID-sponsored study on learning networks concluded, “*The network needs to see this as natural and take conscious advantage of the new perspective and energy that new members bring. The network can incorporate new members by ‘telling the story’ of what has happened so far.*”<sup>4</sup> A case study of the Wallace Foundation’s Education Leadership Professional Learning Community also discussed the challenge associated when new people come on board at different meetings. This case study recommends that if new members are coming, it is important to bring them up to speed before their first encounters with the group.<sup>5</sup>

- ✓ **An individual in the role of “team” leader or “champion,” who has both set responsibilities and customized support, can be important to both achieving success at the convenings as well as applying learning in their home communities.**

In convenings involving teams, it is important to have an individual in the role of team leader or catalyst. These individuals can play multiple roles during the learning process. They can be the conduit for team feedback on their interests and ideas related to the agendas in each of the meetings; they can play a role in preparing team members for the work of each convening; and they can play a role of convening and ensuring follow-up at their own site after the meetings. It is important that the sponsor be very clear about the role and responsibility of the team leader given that this role does involve a more significant time commitment.

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<sup>4</sup> QED Group, LLC, (2013). *Practices of Successful Learning Networks: Documenting Learning from the GROOVE Learning Network*. [online] U.S. Agency for International Development. Available at: [https://agrilinks.org/sites/default/files/resource/files/Practices%20of%20Successful%20Learning%20Networks\\_Aug2013\[1\]%20Copy%20Copy.pdf](https://agrilinks.org/sites/default/files/resource/files/Practices%20of%20Successful%20Learning%20Networks_Aug2013[1]%20Copy%20Copy.pdf) [Accessed 3 Nov. 2015].

<sup>5</sup> Research Center for Leadership in Action, NYU Wagner, (2012). “The Wallace Foundation's Education Leadership Professional Learning Communities.” A Case Study From: *The Power of Learning: How Learning Communities Amplify the Work of Nonprofits and Grantmakers*. Grantmakers for Effective Organizations.

Specific mechanisms that have been used to support team leads include:

- having separate convenings, or add-ons to the learning community, which focus on adaptive leadership training and peer exchange amongst this group;
- involving a rotating set of team leads in co-designing each convening;
- having team leads participate in conference calls prior to the convenings that lay out the goals of each session and prepare the leads for the work that will be taking place; and
- supporting an affinity group or learning circle made up of team leads who meet independently multiple times throughout the initiative.

## Managing the Work

- ✓ **A skilled coordinator or leader is required to oversee design, keep participants connected, incorporate feedback, and provide the glue between the sponsor and the participants.**

While the sponsor of a learning community is often the funder or group of funders involved in the design of the overall initiative, the staff who actually plan and manage the learning communities differ. Many sponsors contract with an outside intermediary who is responsible for the design and implementation of the learning communities, while others do the work in-house. The literature provides evidence of the importance of this role in the success of the work. For example, in their review of federal learning communities, Snyder and Briggs found that the coordinator is *“a linchpin that keeps the community going—perhaps even more important than a high-level agency sponsor, given the value members attributed to the peer-to-peer learning and potential for collective influence in their field.”*

- ✓ **The involvement of participants in co-designing the agenda is highly valued.**

The ultimate success of a learning community depends on the level of engagement of those participating. Much of the literature on communities of practice discusses the importance of participants “owning” the process. Efforts to involve participants in the creation of both the content and the process contribute to the success of the work.

Most of those interviewed also indicated that involving the participants in both the design of the agenda of each meeting as well as in the actual sessions is critical to this engagement. Interviewees noted a number of different methods, including:

- developing a very rough agenda that outlines the purpose and frame for the meeting and then having an open conference call with team leads to provide input into the specific sessions and format for the meeting; and
- assigning an ad hoc committee that includes participants from various teams in a more intensive design process prior to each meeting.

While interviewees considered this engagement important, there was also a sense that this should grow over time and that it is not realistic to expect participants to be involved in setting the agenda or leading learning sessions in the early meetings.

- ✓ **Skilled facilitation is the most important ingredient for successful convenings that are interactive and constructive.**

Having a consistent facilitation team from the sponsor or intermediary charged with leading the work is very important. While outside facilitators are often brought in, the preference is for having staff who are skilled facilitators and who have some knowledge of the communities or participants who are part of the community.

While there was no consensus, many of those interviewed, and some of the literature, suggested that some level of field knowledge was important for those facilitating the meetings or working with teams or breakout groups. For example, the Grantmakers for Effective Organizations' study concluded that it was important to "engage facilitators who bring both process and content expertise."<sup>6</sup> On the other hand, the review of learning communities completed on behalf of USAID concluded that there is the danger of having a facilitator with expertise in the areas of technical focus for the learning networks. The study found that "*effectively facilitating a group while at the same time offering views related to the content is a difficult challenge; efforts to do so often result in a poor balance between the technical content and other important process issues.*"<sup>7</sup>

Whether the sponsoring organization or intermediary uses staff or outside contractors as facilitators, sufficient time and resources are needed to prepare the facilitators for the work. This means providing those without field knowledge with some understanding of the issues or problems that will be the focus of participants and providing sufficient background on the communities and participants to ensure effective facilitation.

There should also be recognition that the type of facilitation needed might evolve as the work in the learning community evolves. Either facilitators need to be very flexible in terms of their style, or there could be a change in facilitators as the work evolves. For example, as members take more ownership of the learning, there might be a role for participants themselves to play a facilitation role.

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<sup>6</sup> Research Center for Leadership in Action, NYU Wagner, (2012). "The Wallace Foundation's Education Leadership Professional Learning Communities." A Case Study From: *The Power of Learning: How Learning Communities Amplify the Work of Nonprofits and Grantmakers*. Grantmakers for Effective Organizations.

<sup>7</sup> QED Group, LLC, (2013). *Practices of Successful Learning Networks: Documenting Learning from the GROOVE Learning Network*. [online] U.S. Agency for International Development. Available at: [https://agrilinks.org/sites/default/files/resource/files/Practices%20of%20Successful%20Learning%20Networks\\_Aug2013\[1\]%20Copy%20Copy.pdf](https://agrilinks.org/sites/default/files/resource/files/Practices%20of%20Successful%20Learning%20Networks_Aug2013[1]%20Copy%20Copy.pdf) [Accessed 3 Nov. 2015].

## Designing the Convenings


- ✓ Perhaps one of the most critical elements of learning community design is creating a format and “culture” that encourages honesty and supports risk taking.

The one commonality across all of the types of learning communities and networks reviewed was the importance of creating a safe place and level of comfort both within teams and across teams. Open and honest reflection is a foundational element of all peer learning and was the one commonality found in all of the literature reviewed. For example, in the USAID-sponsored study, “When asked what contributed to their success, ‘trust’ is often the first factor mentioned by participants in successful learning groups.”<sup>8</sup> Thoughts on methods for promoting this culture within a learning community over time include:

1. having enough informal time, including dinners, receptions, and networking time, during the meetings to support personal as well as professional interactions;
2. encouraging honest feedback and exploring the learning in failure;
3. including work sessions on having honest or difficult conversations as part of the convening; and
4. utilizing design thinking and innovation labs that encourage risk taking and experimentation.

- ✓ Convenings should be at least one-and-a-half days long.

Interestingly, there was near consensus in terms of the length of time of each in-person convening—one-and-a-half to two-and-a-half days, with at least one overnight. Everyone



“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 amongst participants is a critical first step.”

Research Center for Leadership in Action, NYU Wagner. *Learn and Let Learn: Supporting Learning Communities for Innovation and Impact*

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<sup>8</sup> QED Group, LLC, (2013). *Practices of Successful Learning Networks: Documenting Learning from the GROOVE Learning Network*. [online] U.S. Agency for International Development. Available at: [https://agrilinks.org/sites/default/files/resource/files/Practices%20of%20Successful%20Learning%20Networks\\_Aug2013\[1\]%20Copy%20Copy.pdf](https://agrilinks.org/sites/default/files/resource/files/Practices%20of%20Successful%20Learning%20Networks_Aug2013[1]%20Copy%20Copy.pdf) [Accessed 3 Nov. 2015].

thought it had to go beyond one day in order to allow for some informal gathering time or receptions that are important to building trust. While a few of the efforts went on longer, these tended to be more like leadership development/training-oriented convenings. Meeting two or three times a year seems to be the norm.

✓ **Convenings should balance team time, peer exchanges, and external experts.**

Specific areas of focus on team development include developing trust, managing power dynamics, and fostering a culture of innovation and experimentation. However, it is important to note that many said that the best way to build a team is to learn in the context of working on something concrete together. Thus, interviewees noted that having sufficient team time during the convening for those from the same community to work on an “action project” or defined problem was very important. While some felt this work should be formal and facilitated, others thought it was important that teams defined for themselves what was important to work on and how they wanted to work.

It is also critical to allow time for cross-site learning and sharing as part of each convening. One of the efforts provided time at each convening for a “Peer to Peer Marketplace” where individuals could present what they were doing, share their challenges, and involve other sites in developing innovative solutions. Another way to encourage cross-site sharing was to assign participants to tables at lunch and dinner that were cross-site and involved individuals from different communities that were similar in terms of their role.

Interviewees had mixed opinions on the use of external experts and plenary presentations. Many learning communities did include outside experts who made a presentation or an “inspirational” speech. These would then be followed with activities by teams based on those sessions. However, a number of interviewees felt strongly that this should be minimized, that expertise should emerge from the group itself. In one case, outside experts were invited to make presentations, but were then required to stay and participate for the entire convening. The thought was that they would be more engaged, be able to provide coaching and support where needed, and that they themselves would learn and that these learnings would inform the work in the field.

#### Open Space Convenings

As a learning community matures, those involved often take on more and more ownership of the content and have stronger ideas about the best use of their time during in-person convenings. One technique that is used in convenings of networks is what is referred to as “Open Space” or an “Unconference.” In these convenings, attendees set the agenda in real time. Early in the meeting, participants are asked to post their issues and ideas for breakout sessions. The group then develops the agenda and individual participants take ownership of facilitating each learning session of interest. This open structure could encompass an entire convening, or part of a learning community convening could be dedicated to this approach.

Finally, many acknowledged that it takes time for trust and openness to develop across the teams. As a result, early meetings might have more time spent with outside experts or faculty,

but as the work evolves, and by the end, almost the entire convening should involve team time and cross-team sharing.

✓ **The convening agenda needs to balance the “what” with the “how.”**

It is important that the learning agenda include some time spent on “ideas” and “strategies” related to “what” the teams are working on. This is a particularly rich area for peer learning. Folks want to know what others are doing to address the same problem or to try to achieve the same result. But, at the same time, many noted that most conferences focus on the “what,” and there are other ways to learn about specific models and strategies. However, there are much fewer opportunities for sharing and networking with peers around “how” to do the work—building cross-sector teams, taking a systems approach, focusing on results, working with data, etc. These are the particular areas where learning communities made up of peer teams add the most value.

✓ **Learning communities should be designed with a focus on applying learning to practice.**

In many ways, the most important work is what takes place when participants go home. Having participants work on something concrete that they wish to accomplish in between meetings and work on at meetings is important. Being able to test ideas out and come back and say, “This is what we did and this is what we are learning,” and then share this with the larger group, is a common element of many types of network convenings or learning communities.

✓ **Pre-work/homework can help accelerate learning.**

Many of the learning communities require that the individuals or team work on a specific problem or read materials prior to a convening. This pre-work ensures that there is an even playing field in terms of the concepts and materials that will be covered at each convening. And, often some type of “homework” is suggested. For example, one interviewee noted that homework forces connections across the team or the larger network in between convenings. In addition, it raises expectations about the importance of applying the learning to real problems on the ground.

## **Extending the Work: Other Supports and Platforms to Further Learning and Success**

✓ **Beyond large in-person convenings, building a learning community can involve other activities that strengthen cross-site relationships and promote knowledge exchange.**

Learning communities and communities of practice utilize many different platforms. One distinction is between real-time interactions (through convenings, conference calls, site visits, and webinars) and other collaboration and learning channels that participants can access individually (such as social networking, wikis, online learning, document sharing, websites, etc.). There is clear consensus in the literature and interviews that real-time human connections are critical to building relationships and trust. Beyond that, there has been a lot of experimentation with different tools and platforms, some of which effectively use technology.



In between the periodic large convenings that involve all members of the learning network, initiatives have also included other methods for encouraging real-time knowledge exchange. Examples include:

- *Sponsor and support site visits.* Visits to each other's community or to other places that have relevance to the work of the initiative highlight on-the-ground work and also build relationships across teams. The analysis of the federal SafeCities network, for example, noted the "power of site visits to foster peer-to-peer learning about complex practices...and the importance of structuring these informal learning events to realize the full value of the opportunity."<sup>9</sup> These visits can provide an opportunity for greater peer exchange and also for joint problem solving.
- *Develop smaller and more specific learning circles focusing on specific issues or strategies that are of interest to subgroups.* A study of peer networking activities of the Annie E. Casey Foundation found that creating sub-groups focusing on particular topics of interest was important to "keeping the networking activity practical and close to the ground."<sup>10</sup>
- *Utilize other real-time platforms such as conference calls, video conferencing, and webinars.* These tools are used to keep network members engaged between meetings, to provide specialized content that might be of interest to subgroups, and to support the management of the learning community itself.

### Using Multiple Platforms for Learning: The Vibrant Communities Initiative

Vibrant Communities was a 10-year "action research initiative" involving 13 Canadian communities working on poverty reduction. The effort involved three national sponsors: the Tamarack Institute, the Caledon Institute of Social Policy, and the J.W. McConnell Family Foundation. Through this effort, a broad "learning community" was established that encouraged and supported stakeholders in each community. The work included a range of different platforms to encourage learning:

- *Face-to-face events.* As part of the work, three types of convenings were held: a Pan-Canadian Forum that met periodically to exchange ideas and explore themes; regional forums that emphasized shared challenges and opportunities at a regional level; and "know how institutes" that explored different aspects of working collaboratively on complex issues.
- *Website.* The website included content such as podcasts and audio downloads that were able to disseminate learning more broadly.
- *Electronic newsletters.* Two newsletters provided those in the learning community with updates on activities and learnings
- *Coaching.* Coaches were available to communities for up to seven days of coaching per year.
- *Tele-learning.* 60-minute conference calls provided the opportunity for coaches to interview thought leaders in a particular area.
- *Convener calls.* Communities participated in bi-monthly sessions to identify and discuss issues of common interest for just-in-time learning.

An evaluation of this work concluded, "There are clear benefits to establishing an interconnected architecture of supports in situations where the burden of learning is high." (Leviten-Reid, 2006)

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<sup>9</sup> Snyder, W. and de Souza Briggs, X. (2003). *Communities of Practice: A New Tool for Government Managers*. Collaboration Series. IBM Center for The Business of Government.

<sup>10</sup> Backer, PhD, T. (2008). *Peer Networking and Community Change: Experiences of the Annie E. Casey Foundation*. The Annie E. Casey Foundation.

In their paper on designing effective knowledge networks, Katrina Pugh and Laurence Prusak found that despite excitement about social media and collaboration portals, real-time human connections were critical to network success.<sup>11</sup> However, they also noted that there is a place for other forms of learning and interaction. They propose creating a matrix that identifies what channels or vehicles are used for what purpose and for what members. Examples of other types of channels that are being used to supplement real-time exchanges include:

- *Social networking and communication tools:* One area that has been a particular frustration among those running learning communities and networks has been implementing some type of more systematic communication vehicle for the participants in the network. In fact, while many of those working on networks and learning communities have experimented with various ways to keep folks engaged and communicating, most noted that this was not a very successful part of the work. For example, many reported that those involved in the network have not used LinkedIn or other social network sites created for participants. In some instances, they asked participants to blog about their work or the work of the convening, but very few actually did so.
- *Online learning:* Developing curriculum or making curriculum available online to participants is another tool that is being used to enhance learning and build capacity. There is an extensive literature on effective e-learning strategies. What is clear is that developing courses customized to the participants that would be available online requires considerable expertise and knowledge of the e-learning field.

**“Blended Learning Communities integrate online learning and face-to-face meetings. There are two core assumptions that underlie approaches to building blended learning communities: 1) that the deeper the personal relationships between learners, the richer the collaborative learning experience; and 2) that relationships between learners may be strengthened through structuring group interactions (using technology) before and/or after a face-to-face training event.”**

**Kaplan, S. (2002). *Strategies for Collaborative Learning: Building eLearning and Blended Learning Communities*.**

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<sup>11</sup> Pugh, K. and Prusak, L. (2013). “Designing Effective Knowledge Networks.” *MIT Sloan Management Review*, 55 No. 1(Fall 2013), pp.79-88.

✓ **Additional supports can accelerate and deepen the work.**

Many of the learning communities that Mt. Auburn reviewed involved grantees of existing philanthropic or federal agency initiatives. In these examples, additional coaching and funding were part of the ongoing work of their grants.

Even in cases where the learning community was not part of a larger initiative, additional supports from the “sponsor” or “funder” were found to be useful. These supports include:

- *Coaching:* Many sponsors assign a coach to each community involved and/or to the team leads.
- *Small grants for experimentation:* The sponsor could provide a small flexible amount of resources that communities could use for experimentation or to follow up on areas that the team explored during the convening. This could further deepen the engagement in the learning and the outcomes of the work.
- *Research and data to support identified questions:* The sponsor could provide general support to participants who are struggling with specific problems or need additional research to accelerate their work.
- *Rapid technical assistance during learning communities:* During the learning communities, outside experts or facilitators could provide just-in-time technical assistance to participants or to teams as specific issues surface during the meeting. Or, teams can come to the convening with a set of specific problems that they would like help on at the convening.

✓ **The capture and dissemination of learning and innovative ideas from the group can help build purpose among participants and provide new thinking in the field.**

Some learning communities or learning networks are seeking to have an impact beyond the individuals, organizations, and communities that are participating. For example, the sponsor may be attempting to identify innovative solutions to complex problems that have challenged a specific field or may be trying to extend the knowledge created through the learning community to the broader field.

Various methods have been used to try to document and capture some of the learning that is occurring through learning communities and peer networking. Frank Farrow and Lisbeth Schorr looked at effective practices in communities of practice and noted the importance of documenting shared learning. According to this research, *“For this to occur, attention should be given to recording the knowledge shared; reflection on and analysis of that information; and continual dissemination of the information to the participants (and potentially to the field at large).”*<sup>12</sup>

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<sup>12</sup> Farrow, F. and Schorr, L. (2010). *Communities of Practice to Achieve Results in Promise Neighborhoods: An Issue Brief*. Real Time Lessons Learned Series. Center for the Study of Social Policy.

The knowledge created through the work over time comes from multiple sources: the participants, the faculty or experts who have been engaged in the convenings, and the sponsor or funder of the work. Often it is the responsibility of the intermediary or sponsor that is tasked with designing the learning communities to develop a knowledge capture and dissemination strategy. This could include assigning participants to blog about the experience, having a formal “documentarian” involved to write about the process, or developing reports and toolkits based on any knowledge that emerges from the work.

## Encouraging Feedback, Evaluation, and Learning

- ✓ **Feedback loops that promote continuous improvement and learning about each convening and intervention are important to sustaining quality and engagement over time.**

Maintaining the momentum and the engagement of a consistent set of participants in multiple convenings, over a multi-year period, is extremely challenging. Even one poorly designed or implemented convening can have a huge impact on future sessions of a learning community. As a result, it is critical that there be a great deal of attention to building effective feedback loops after the completion of each convening or other form of intervention (i.e., webinar, site visit, etc.). In essence, the effort to build and sustain learning communities needs to have a strong emergent learning orientation. An assessment of Communities of Practice for adaptation practitioners concluded, *“Continuous, regular review needs to be built into the design of any successful CoP to understand if established processes and structures are working, to address concerns and to identify emerging issues of interest to members.”*<sup>13</sup>

### Emergent Learning and the Use of Before and After Action Reviews

Developed over 30 years ago by the U.S. Army, the “After Action Review” (AAR) involves an iterative process aimed at improving operations and outcomes. The process has now been used as part of emergent learning processes in many domains. According to Charles Parry and Marilyn Darling, who have written about and used this technique, the AAR process involves “a leader gathering his or her team on a frequent basis to address a series of questions about their actions.” Typical questions include:

- What was supposed to happen?
- What actually did happen and why?
- What are we going to do next time?

Just as important as the AAR is the Before Action Review (BAR). The BAR focuses the team on the intended result of its action and its assumptions about what will be needed to achieve success.

The learning communities that were part of the Living Cities Integration Initiative made effective use of BARs and AARs. Facilitated by Marilyn Darling of Fourth Quadrant Partners, the learning community team went through a disciplined process of completing a BAR before each convening, and immediately following the convening it went through an AAR process. This process engaged the entire team involved in the convening in reflecting upon what worked and did not work, whether it achieved the outcomes identified in the BAR, and what the implications of the learning were to future design and implementation.

Parry, C. and Darling, M. (2001). “Emergent Learning in Action: The After Action Review.” *The Systems Thinker*, 12(8), pp.1-5.

<sup>13</sup> Paas, L. and Perry, J. (2012). *Understanding Communities of Practice: An overview for adaptation practitioners*. International Institute for Sustainable Development.

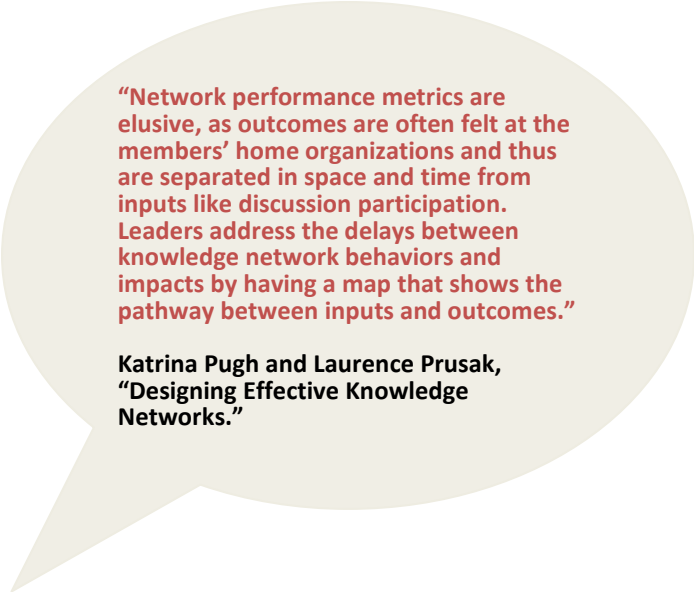
The most commonly used source of feedback was a survey completed by participants at the end of a convening. While everyone uses this tool, a number of those interviewed reported on the limitations of participant surveys for improving practice and for understanding the relative strengths and weaknesses of various design elements. Challenges included participants' willingness to complete the surveys, to provide frank and honest responses, and to give sufficient useful information in short, quick responses.

While these surveys provided the greatest feedback when the sessions were "freshest" in the minds of those who participated, the other major limitation is that to get a sense of what learning was "sticky" requires getting feedback weeks or months later. When participants are back working at home, it often becomes clearer what they learned and what was useful about the convening. The Annie E. Casey Foundation, recognizing this limitation, hired a third-party firm to go back to each community many months after a Making Connections learning convening to see if participants remembered some of the learning and whether or not they were applying what they learned to the work in the community.

Reflective practice on the part of those designing and running the convening is also a critical part of the feedback loop. For those designing and running convenings, before and after action reviews were noted in some cases as a useful tool for articulating expectations about each convening and debriefing at its conclusion. This debriefing can focus on both the larger design issues as well as the small logistical issues (i.e., room setup, etc.) (See sidebar on page 20.)

✓ **Evaluation should consider changes in individuals, in groups, and in communities.**

Knowing if and how participants in learning communities are applying the learning and whether it is contributing to addressing complex problems was core to most of the efforts that Mt. Auburn reviewed. Yet, Mt. Auburn was unable to identify any specific evaluations that looked at the learning communities in terms of their intended outcomes either within a larger initiative or independently. There were a few examples where some baseline and follow-up data were collected on individuals or teams that are engaged in the learning activities. And, there were a few examples that discussed the role of learning communities as part of a more comprehensive evaluation of a



**“Network performance metrics are elusive, as outcomes are often felt at the members’ home organizations and thus are separated in space and time from inputs like discussion participation. Leaders address the delays between knowledge network behaviors and impacts by having a map that shows the pathway between inputs and outcomes.”**

**Katrina Pugh and Laurence Prusak,  
“Designing Effective Knowledge  
Networks.”**

multisite initiative.<sup>14</sup> But, the literature and experience with evaluating learning communities and other learning networks are limited.

Assessing whether the learning communities achieved the interim outcomes, such as strengthening collaborative teams, promoting successful peer learning, sparking innovative solutions, and building field knowledge, cannot be understood through the surveys that are used to assess reactions to specific convenings. Moreover, the real evaluation question of many sponsors of learning communities goes beyond whether or not the learning community has achieved its intended goal. The larger question is whether or not the interventions have contributed to sustainable changes among the participants, the organizations within which they work, and the communities in which they are located. To assess both the interim outcomes and long-term impact requires a more formal evaluation framework and methodology.

## CONCLUSION

Both within the private sector and the social sector there has been growing recognition of the value of peer learning. Evidence suggests that when addressing complex problems, the common learning mechanisms in a field, such as traditional conferences, are not effective. Moreover, there is a great deal of conference fatigue. The most often noted comment following a conference is that while there were some interesting sessions, it was the opportunity to network that was most highly valued. Learning communities provide that opportunity to network, but with a more deliberate focus on knowledge exchange and innovation.

In addition, as collective impact and other forms of cross-sector collaboration become the norm in addressing a wide range of community challenges, learning communities provide a critical opportunity for the stakeholders in these collaboratives to meet away from home and to focus their attention on “how” to work together more effectively to make a difference in their communities.

As funders think about designing and supporting different types of multisite learning communities, it is important to think clearly about the goals of the work and how the various findings from this paper apply to different goals. The following chart provides an overview of how thinking about “who” should participate in a learning community and “how” the learning community is structured relates to the intended goals.

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<sup>14</sup> Mt. Auburn Associates, Inc., (2014). *The Integration Initiative: Final Outcome Report*. Living Cities.

## Aligning Goals and Design

GOAL	Who Attends	Design Elements
Building Cross-Sector Teams	<ul style="list-style-type: none"> <li>Assigned team leader</li> <li>Consistent core team</li> </ul>	<ul style="list-style-type: none"> <li>Sufficient team time during convenings</li> <li>Focus on action project at home</li> <li>Community Coach</li> <li>Sufficient focus on “how”</li> <li>Communities of Practice for leads</li> <li>Homework</li> </ul>
Cross-Team Learning	<ul style="list-style-type: none"> <li>Sufficient commonalities across teams in terms of role &amp; level of authority</li> <li>Each community has a peer</li> <li>Working on similar problems, systems, or results</li> </ul>	<ul style="list-style-type: none"> <li>Sufficient informal time – receptions, etc</li> <li>Site Visits</li> <li>Sufficient focus on strategies</li> <li>Sub-groups based on common interests</li> <li>Effective networking platforms</li> </ul>
Catalyzing Innovation	<ul style="list-style-type: none"> <li>Diversity in terms of perspectives and roles</li> <li>Working on similar problems, systems, or results</li> <li>Decision-makers</li> </ul>	<ul style="list-style-type: none"> <li>Open and trusting environment</li> <li>Use of design labs/innovation labs</li> <li>Specialized physical environment</li> </ul>
Field Building	<ul style="list-style-type: none"> <li>Working on similar problems, systems, or results</li> </ul>	<ul style="list-style-type: none"> <li>Use of documentarian</li> <li>Staffing for policy and best practices reports</li> <li>Communication and knowledge dissemination strategy</li> </ul>

This paper reports on the findings from a limited set of interviews and a review of the literature. As noted in the introduction, most of the knowledge about what works and what does not work in the design and implementation of multisite learning communities is limited to the learning of those directly involved in these initiatives. Many of the individuals whom Mt. Auburn interviewed for this paper suggested that what the field needs is a Community of Practice for professionals involved in creating learning communities and Communities of Practice in the social sector. This would provide an opportunity to share learning more fully, to promote more experimentation and reflection, and could lead to formalizing what is now largely tacit knowledge.

# Appendix A: List of Interviewees

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## **Cross-site Initiatives with a Learning Community Component**

John Weiser, Partners In Progress

Cassandra Benjamin, The Integration Initiative

Bonnie Gordon, Integrated Service Delivery Collaborative and Partners for Postsecondary Success - MDC

Lili Allen, Opportunity Youth Incentive Fund - Jobs for the Future

## **Other Learning Initiatives/Networks**

Neil Kleiman, NYU Wagner Innovation Labs and National Resource Network of SC2

Stephen Michon, FutureWorks – MetroBusinessNet, Talent Dividend Network, Fellowship for Regional Sustainable Development, Regional Prosperity Network, Fellowship for Educational Attainment, Communities That Work Partnership

Janet Topolsky, Aspen Institute, Community Strategies Group

Amira Bliss, The Rockefeller Foundation

Sarah Jane Maxted, MIT Regional Entrepreneurship Acceleration Program (MIT REAP)

Bobby Milstein, Fannie E. Ripple Foundation, ReThink Health

## **Private Sector and Design Thinking**

Marga Biller, Harvard University, Learning Innovation Laboratory

## **Experts in Learning and Knowledge**

Marilyn Darling, Fourth Quadrant Partners

Alison Gold, Presidio Institute

Bill Shepardson, Annie E. Casey Foundation

Tim Larson, Ross Strategic (Kresge project)



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