Guide to the

PRINCIPLES OF EMERGENT LEARNING

Authored by members of the Emergent Learning Community

Edited by Marilyn Darling and Avery Eenigenburg

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Dedication

This Guide to the Principles of Emergent Learning is dedicated to the community of Emergent Learning practitioners who have contributed so much inspiration and commitment to deepening our collective understanding as a field about what it takes to create social change in a complex world.

The Emergent Learning Community Project would like to thank **The Skillman Foundation**, **The Annie E. Casey Foundation**, and **BlueCross BlueShield of North Carolina Foundation** for their generous support, which made it possible to produce and provide this guide to the community and public at no cost.

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Introduction

By Marilyn Darling

"Emergent Learning is a way of being in the work.
Same conference, same colleagues, different me."

— madeleine kennedy-macfoy (2021)[1]

What is Emergent Learning?

For those of you who are new to this work, Emergent Learning (EL) is, quite simply, a set of principles and practices to help people across a system think, learn, and adapt together in a way that helps them achieve the important social goals to which they aspire.

EMERGENT LEARNING

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But it's also much more than that. Emergent Learning is *emergent*. As madeleine kennedy-macfoy (2021) observed above, EL is a way of being in community with others that creates the conditions for many of us to learn together — creating a whole that is greater than the sum of its parts. EL is about what we do in this moment right now and how, if we do that over and over, we will impact the larger system. It is about building a muscle rather than — or maybe in addition to — trying to solve a problem from the outside in.

[1] Throughout this guide, we include a year after the names of members of the EL Community, indicating the year an Emergent Learning practitioner joined the EL Community.

What does Emergent Learning look like in practice?

Imagine a couple of urban activists sitting on a bench next to a blighted empty space. What will it take to turn that space into an organic garden in which we can gather to enjoy community meals together? What do we know so far to get started? How will we learn from our experiments in gardening and hosting community meals? That's a simple illustration of how EL practitioners are addressing issues of economic opportunity, racial equity, transportation, childhood literacy, and climate change at a local, national or international level.

Image Credit: Taylor Hayes (2021), taylorhayesart.com

Practicing Emergent Learning — building that muscle to learn together — grows the creative potential and agency of the whole community.[2] You will discover this as you read the many examples and experiences offered in this guide, which has been authored by members of the EL Community.

Achieving ambitious social impact goals is hardly ever a straightforward undertaking. To make real progress on goals like growing the economic prosperity of whole communities or creating health equity across a state requires navigating obstacles like competing priorities, limited resources, short memories, and the winds of politics. And success might be defined in different ways by different people. In other words, ambitious social goals cannot be achieved by aligning around one "right" path and following it in a linear way to completion.

Such an undertaking requires the commitment of entire ecosystems of people, groups, organizations, and institutions. The people who inhabit these ecosystems and who represent a wide range of roles and perspectives need to be able to come together to share their thinking and experience along the path (or paths) to achieving these goals, so that they can notice what's working; what's not working; what's changed in the environment; and how to productively adapt.

We often liken Emergent Learning to what it takes to become a championship sports team — each person, equipped with the wisdom of the collective and drawing on their own agency to take action in the moment, plays their own unique role in the larger team's success.

What is a principle?

A principle is an idea that serves as a foundation for thinking and acting creatively in whatever situation we find ourselves in.

PRINCIPLE

A principle is an idea that serves as a foundation for thinking and acting creatively in whatever situation we find ourselves in.

The Golden Rule, for example, is a principle: "In everything, do to others as you would have them do to you." It does not dictate what to do in any one situation. Rather, it serves as a guide to help you think *for yourself* about how to behave in any number of situations, including situations that are completely novel to you. It even says right up front that this principle can be applied "in everything."

Abraham Lincoln's definition of democracy as "of the people, for the people and by the people" helps each of us think *for ourselves* about what counts and what does not count as democratic practice, whether or not we have been deeply trained in public affairs. It helps us think about what it would take to make our government more democratic and what might endanger it, and it helps us make our own decisions about who should represent us in that government.

[2] Emergent Learning can be used in all sectors. It is especially suited for the social sector, where it literally "takes a village" of actors working across organizational boundaries and learning together to achieve challenging social goals.

Statements of principle can challenge us to ask different questions in our own lives and work. Martin Luther King said, "Darkness cannot drive out darkness; only light can do that. Hate cannot drive out hate; only love can do that." It leads us to ask ourselves: what does it take to bring light and love into what often seems like places of darkness and hate?

What does it take to bring light and love into what often seems like places of darkness and hate?

In her book, *Emergent Strategy*, adrienne maree brown beautifully describes a set of principles that resonate for Emergent Learning practitioners, including "Small is good, small is all (the large is a reflection of the small);" and "Trust the people (if you trust the people, they become trustworthy)."

Principles are essential to Emergent Learning because we are all out there walking slightly different paths toward our shared goals, alongside people with different points of view and rich experience and wisdom to share. As EL practitioners gain experience, they come to understand and value these principles differently.

This guide illustrates what it looks like when teams, organizations or whole communities apply the principles of Emergent Learning to help them think *for themselves* about how to address the unique, real-life situations they are up against every day.

I connect more with the principles than with the practices. I notice that even when I get into the weeds of my project work, I am able to lift my head up and look at the overall learning orientation of the group. What's preventing them from having deep, meaningful learning conversations? Are they allowed to experiment or is there a culture of needing to be an 'expert'? This growing awareness has shifted my own mindset about how to approach conversations and create spaces for learning.

We describe nine principles here — which by no means are the only ones and are not set in stone. These principles aim to help us remember where we are headed and to think creatively and experiment as we go, returning what we are learning to the whole system of actors, so that we create the conditions that will enable us, together, to continue to make progress and to learn on our collective journey.

The principles of Emergent Learning you will read about in the following chapters include:

CHAPTER 1: **Strengthening Line of Sight**
CHAPTER 2: **Making Thinking Visible**
CHAPTER 3: **Asking Powerful Questions**
CHAPTER 4: **Maximizing Freedom to Experiment**
CHAPTER 5: **Keeping Work at the Center**

CHAPTER 6: **Inviting Diverse Voices to the Table**
CHAPTER 7: **Holding Expertise in Equal Measure**
CHAPTER 8: **Stewarding Learning through Time**
CHAPTER 9: **Returning Learning to the System**

We talked about principles and practices, so…

What is a practice?

A practice is about an action, rather than a thought or idea. To practice means to take an action; to carry out or perform some action regularly. Practices are a means to an end. There is nothing inherently right about any given practice. Its 'rightness' is measured by its ability to help us achieve something we care about. We practice to build our skill over time.

PRACTICE

To practice means to take an action; to carry out or perform some action regularly.

As we said above, we often talk about the practices of Emergent Learning as "building our muscle" for thinking and learning together. Through practice, we expand what's possible in the moment. For example:

- We learn to notice when a group lacks line of sight and to ask, "Let's pause for a moment and remind ourselves….what are we really trying to accomplish here?"
- We learn to notice when a decision is being made without regard to some key voices and to ask, "What other voices need to be part of this conversation?"
- We learn to notice when we have skipped right past what happened before in the rush to what's next and to ask, "Can we take just a moment to reflect on what happened last time and what we learned from it?"

What are we really trying to accomplish here?

What other voices need to be part of this conversation?

Can we take just a moment to reflect on what happened last time and what we learned from it?

The principles of Emergent Learning inform our practice, but they also evolved as a result of our practice. They literally are the patterns that *emerged* from years of EL practice.

In this guide, you will find frequent references to EL Practices, including:[3]

- **Before and After Action Reviews**
- **Emergent Learning Tables**
- **EL Questions and Framing Questions**
- **Hypotheses**
- **Learning Agendas**
- **Learning Logs**

But, another reason why focusing on the principles of Emergent Learning is so important is that it helps us to realize that there are many other practices beyond these that can be used to support the intention and principles of EL. Sometimes a group needs the rigor of an EL Table to help them really make their thinking visible to each other and to make sure that all voices get heard and respected. Sometimes, as Anne Gienapp (2014) reminded me the other day, the intuitiveness of "What? So what? Now what?" works better.

Our intention for this guide

Our intention for this guide is to give new practitioners a comprehensive introduction to the principles of Emergent Learning and to share stories from other practitioners about their significance in practice. For people completely new to EL, our aim is to provide a window into the intention behind these practices; to give you a deeper sensibility about what EL is about and when, why and how you might apply these practices to your own work.

> This is a guide written in the spirit of emergence and community.

This is a guide written in the spirit of emergence and community — by practicing members of the EL Community. For those who are new to Emergent Learning, each chapter begins with a definition and description of why this principle matters, along with what it might look like when the principle is present in our work or absent. Beyond that, authors have been encouraged to express their own unique voice and perspective about what this principle means to them. This in and of itself is emergent and exemplary of the intention and principles of Emergent Learning.

Because this guide has been written by current EL practitioners, it is also an opportunity for our community to contribute to the collective knowledge of this growing field.

[3] For more on Emergent Learning Practices, see https://emergentlearning.org/practices/.

A huge thank you to everyone who contributed to creating this guide

As a community, we strive to live by the principles of Emergent Learning that you will read about in this guide. Expertise in Equal Measure is one of those principles. And it is especially because of this principle that the *Guide to the Principles of Emergent Learning* has been co-authored by the community.

This guide has been made possible by the combined efforts of over 65 Emergent Learning practitioners and partners in Emergent Learning work, including 16 chapter authors and co-authors.

You can read about the authors and contributors at the end of this guide. We want to also acknowledge those who worked behind the scenes to make this Guide possible: Kecia Bertermann, Allison Catalano, Omar Carrillo Tinajero, Tracy Costigan, Katie Grace Deane, Felisa Gonzales, Ray Gordezky, Nancy Pole, Vanessa Samuelson, Deepti Sood, Jim Stiles, and Sandra Wegmann for their thoughtful work as peer reviewers, and Karuna Chibber, Anne Gienapp, Christina Koukkos, River Sturdivant, and Rees Warne for their diligent proofreading. Additional thanks to: Taylor Hayes for her artistic contributions and keen copy editing eye, and Ruu2 for the beautiful layout and design.

And a special thanks to my co-editor, Avery Eenigenburg, who served as a thinking partner, peer reviewer, co-author, co-editor and project manager, for making this guide come to life.

CHAPTER 1

Strengthening Line of Sight

By Parvathi (Parv) Santhosh-Kumar, MPP (2017) and Jessica D. Mindnich, PhD (2020)[1]

"Are we there yet?"

If we timed the drive through Los Angeles just right, we could get to Disneyland in about six hours. And when our girls were young, Disneyland was *the* 'Happiest Place on Earth' — the rides, the characters, the softserve. Every moment and attraction filled them with pure delight.

But the drive could seem endless for a three- and six-year-old. So we learned to use landmarks as signals of progress along the way. Anderson's Pea Soup let them know that we were officially on our way. And when we hit the Grapevine, the girls knew Disneyland was within our grasp. The excitement became palpable when we passed Six Flags Magic Mountain. And the enthusiasm would hit a fever pitch when the girls saw the Disneyland Way exit sign which gave way to a view of the Matterhorn. Each landmark was a reminder of our destination. It told the girls that their hunger, fatigue, and restlessness would all be worth it if they could be patient for a little while longer.

For my (Jessica's) family, Disneyland was our line of sight. It was the place we were all trying to get to. And we each had a different role in ensuring we made it to our destination. My husband drove the car. I kept watch for restaurants and gas stations, monitored our music selection, and made sure everyone had snacks and water. The girls were responsible for giving us ample warning if we needed to make a stop while also making plans for what we would do once we got to Disneyland.

Each landmark was a reminder of our destination.

Having a clear sense of our destination, also known as a line of sight, helps us get from where we are to where we want to be. Without a line of sight, we are in danger of wandering aimlessly. Without knowing our destination, it would be pretty hard to know if and when we were headed in the right direction. When working towards a goal on our own, and especially in groups, strengthening a line of sight creates a shared sense of purpose and provides the wherewithal to persevere.

1 The year a practicioner joined the EL Community.

LINE OF SIGHT

A clear, unobstructed, and unwavering view towards a shared goal.

What is strengthening line of sight?

Like a lighthouse, **strengthening line of sight** is meant to be a guiding beacon that gives people a clear sense of direction and purpose. It is about keeping in front of us "a goal so compelling that it generates the emotional commitment necessary to realize it, no matter what, or how long it takes" (Strengthening line of sight, 2023).

It is co-created through questions like "What does success look like?" or "How will we know if we have achieved success?" Through an alignment process, we build a shared understanding of what our destination will look, feel, and sound like. And because it is collectively constructed, the line of sight illuminates a path towards a shared purpose, giving each individual a clear understanding of how they contribute to the whole. In doing so, we gain the opportunity to strengthen our alignment so that our individual actions contribute to getting from our current reality to our desired state.

HOW DO WE KNOW OUR ORGANIZATION HAS A LINE OF SIGHT?

FOUR QUESTIONS TO GET STARTED:

- Can I articulate the change we are working towards in plain language?
- Would others agree with my articulation?
- Is it clear how the work of individuals contributes to the change your organization is working towards?
- Does the organization have a habit of discussing new work in relation to how the work will contribute to or advance the line of sight?

If you answered "no" to any of the questions above, your line of sight is likely emergent. If this is the case, then it is important to notice, listen, and ask powerful questions. In this way you can begin to uncover the line of sight and build towards shared alignment. Expect the process to be a little messy. It will likely not be linear and will unearth unknown or unspoken points of misalignment. You will recognize that people may be using the same words but meaning different things. It is important to lift up and work through misalignment as it arises.

What does strengthening line of sight make possible?

Line of sight can be used in big and small ways, almost on a daily basis. At the micro-level, simply asking, "Before we get into this, can we just remind ourselves what we are trying to accomplish here?" can be an act of strengthening line of sight. At the macro-level, working to achieve complex and large-scale systems change requires adaptability, so continuously testing and evolving our line of sight can help us adapt to shifting conditions.

QUESTIONS TO STRENGTHEN LINE OF SIGHT

What are we trying to accomplish?

What are our intended results, and how will we know if we've achieved them?

What will it take to meet our ultimate goal?

How will we know if we have achieved our desired results? What would be different?

What would it look like, feel like, sound like?

Are our current decisions and actions moving us toward or away from our aims?

How will we need to shift business as usual to move toward our desired change?

We use line of sight to clarify the desired state and test decisions and actions against their effectiveness in moving us toward the ultimate goal. When line of sight is clear, everyone understands how their current decisions and actions advance the ultimate goal. It allows teams to test decisions and actions against how likely they are to advance the ultimate goal. When teams are committed to strengthening line of sight, teams stay curious and continue to push for additional clarity by regularly engaging in questions like "What will success look like?"

As teams strengthen their shared line of sight, they naturally start to replace jargon and fuzzy language with simple and plain language. For example, many youth-supporting organizations aspire to center, engage, and empower youth in their work. Nearly everyone can agree that "centering," "engaging," and "empowering" youth are good things to do — because that fuzzy language is like motherhood and apple pie.

Leaders and boards may be more uncomfortable or feel riskier about a clearer line of sight, such as "shift power to youth by creating youth-led grantmaking and increasing the proportion of youth on boards to 50%." By pushing for clarity and specificity, line of sight can become a touchstone during decision-making, conflict, or accountability conversation. It keeps the ultimate goal at the center of work so that teams can focus on what's most important.

What does it look like when line of sight is present or absent?

Present	Absent
✓ Everyone in the group agrees on the goal(s) for each step along the path and would recognize success if they see it.	✗ People disagree on what the goals are or agree on the goals at an abstract level but don't test their fuzzy language.
✓ They keep that image in front of them and use it as a guide for making decisions and testing their thinking and results, deepening their understanding of the end state with each success or failure.	✗ Communication about goals is loaded with add-on ideas and extraneous requirements.
✓ Everyone is able to see how their work contributes to the whole.	✗ People get lost in the technical aspects ("the weeds") of implementation or focus on lots of action and activity without a clear sense of purpose.

How to avoid pitfalls while strengthening line of sight

Without a line of sight, a team is rudderless. Teams may be working hard but not clear on how their efforts add up to impact. And without that clarity, the motivation to learn together is weakened. They may think they agree because they use fuzzy language, but they may get lost in the weeds, fall into work avoidance, or unintentionally pursue conflicting goals. Here are some lessons we've learned about addressing common pitfalls you may encounter while strengthening line of sight:

Embrace emergence

When people are first introduced to the concept of line of sight, it may seem simpler or more comfortable to think there should be just one path from the current state to the desired state. Most people are comforted by constancy and routine — and our systems reflect that. Since the goal should not be a moving target, it's easy to want the line of sight to be steady as well. However, the power of strengthening line of sight is embracing the emergence of complex systems work and understanding that there are "many ways to many" (Massoud, Alyesh, & McCannon, 2016). When things are quickly and continuously changing, we need to remain flexible and agile while still having a sense of direction. A line of sight requires continuous learning and improvement, the will and skill to pivot and adjust as the circumstances in which we are working evolve.

Test, learn, and improve

While the long-term desired state may be fixed, the path from the current reality to that desired state may take many twists and turns. Having a strong line of sight helps create the clarity to open up doors for freedom to experiment. A team's hypotheses about what it will take to get from here to there may change as they experiment, test, learn, and improve their strategies over time. Staying curious and asking powerful questions during the process helps make thinking visible, so that diverse perspectives are shared, built upon, and clarified. This keeps the work at the center while making a path visible to the desired result. Everyone has agency and expertise to offer wisdom around strengthening the line of sight.

> When things are quickly and continuously changing, we need to remain flexible and agile while still having a sense of direction.

PRACTICE

Use line of sight formally and informally

Strengthening line of sight can be done informally during the course of strategic work and it can be incorporated into tools and practices of Emergent Learning[2]:

Before and After Action Reviews start with "What are our intended results? What will success look like?" and "What were our intended results? What were our actual results?" respectively to help hone and clarify the line of sight.

Emergent Learning Tables can also help groups slow down and make their thinking visible about what's known while making progress towards the goal.

Using an **Action Hypothesis** that asks "If we do X, then we expect Y will happen, leading to Z result" can help make visible the cause and effect thinking and the assumptions behind the line of sight as a way to illuminate and address gaps and strengthen strategies to achieve results.

EXAMPLES AND STORIES FROM THE FIELD

What does strengthening line of sight look like in practice? Following are examples from our own work and the work of other Emergent Learning practitioners.

Creating shared line of sight to drive emergent strategy and aligned action

When I (Parv) was Vice President of Equitable Results at StriveTogether, I used line of sight as a shared team experience to create clarity around our organizational strategy to help every child succeed in school and in life, from cradle to career.

StriveTogether is a national movement working to ensure every child has every opportunity to succeed in school and in life. Through the Cradle to Career Network, we help communities build and sustain the civic infrastructure needed to mobilize leaders across sectors around a shared vision to advance better and more equitable cradle-to-career outcomes for children and families furthest from opportunity. We were the first Results Count® Hub that pioneered the use of a results-oriented approach to make measurable, lasting improvements in the lives of children and families.

It was 2021, and the cradle-to-career partnerships — local cross-sector coalitions working to shift policies and practices to improve youth outcomes — were beginning to make sense of the disruptions of the COVID-19 pandemic and grapple with the long-term impacts on children and families furthest from opportunity. I created Partnership Progress Deep Dive Week as an opportunity for our team members to slow down, reflect together about organizational strategy, and collaboratively develop a shared goal for each cradle-to-career partnership in the Cradle to Career Network.

For one intensive week, dozens of team members gathered for quick virtual sessions centered around each of StriveTogether's 68 cradle-to-career partnerships. Anyone in the organization could gather and share their learning about each partnership, reflect on each partnership's strengths and challenges, and align on a line of sight for the priority work ahead for each partnership. Our sessions centered around the question,"What would most unlock progress toward transformed systems and equitable outcomes, from kindergarten readiness through high school graduation, postsecondary completion and employment?"

Historically, internal strategy development processes had been grounded in global insights gleaned across macro-level data for all 68 partnerships. To supplement these global insights — and to pursue a more emergent strategy — Partnership Progress Deep Dive Week pushed the team to complement the macro and the micro, creating the foundation for personalized and targeted strategies for each partnership. Grounded in a clear and concise line of sight for each individual partnership, the team was able to match partnerships with the right combination and dosage of relevant Cradle-To-Career Network offerings to propel each partnership toward better and more equitable outcomes.

For example, one partnership's line of sight was "Create formal structures for youth and families to make decisions around shifts to policies, practices, and resources" which led to targeted invitations to participate in Network events focused on co-developing solutions with youth and families. This line of sight was strong because it specified a clear direction for the work ahead, without using fuzzy language.

The synthesized insights and lines of sight from Partnership Progress Deep Dive Week have now become a touchstone for how StriveTogether team members work with partnerships. Lines of sight guide interactions with partnerships and helps everyone stay focused on a common, personalized target for each partnership — keeping a relentless focus on what key moves will most accelerate this partnership's progress to systems transformation and more equitable cradle-to-career outcomes.

Using line of sight in the early days of COVID

In early 2020, I (Jessica) was the Director of Strategic Learning and Evaluation at the San Francisco Foundation. As the COVID-19 pandemic hit, I found myself on the frontlines of helping the organization be nimble and responsive while holding the line on racial equity.

The San Francisco Foundation is one of the largest community foundations in the United States. Its mission is to mobilize community leaders, nonprofits, government agencies, and donors to advance racial equity, diversity, and economic inclusion. As a Results Count® Hub, the Foundation had spent the last three years sharpening the people, places, and strategies that would be prioritized to advance racial equity in the Bay Area. Tremendous time and care had been spent listening to people outside of the Foundation while aligning people within the Foundation.

Working with Marian Urquilla (2013), principal of Strategy Lift, we designed and facilitated a four-part series which utilized line of sight to help program staff adjust to the many unknowns that had been introduced into efforts to advance economic stability and mobility, increase access to affordable housing, and build community power. As part of that effort, Marian and I developed a worksheet to help leaders create and strengthen their line of sight. (A copy of this worksheet is included at the end of this chapter.)

In addition to a line of sight, this worksheet helped program associates gain clarity on the shifts that should be seen in the short- and mid-term if things were going well. This gave program associates guideposts on if, and when, strategic changes would be warranted.

Using line of sight to challenge assumptions and stay flexible

Katie Grace Deane (2018), Vice President of Operations and Learning at the Lincoln Institute of Land Policy uses line of sight to help teams get clearer about changing assumptions as they learn more in working towards a shared goal. "Strengthening line of sight is getting really crisp and clear on what you're trying to do. It can be really easy to not be aware that your thinking about the goal is changing or evolving. There's a component of vigilance when it comes to making sure your assumptions about line of sight continue to be true as you learn more," she said.

One recent example was working on internal communications. When Katie Grace first joined the team, there was a perception that internal communication was a challenge and people were working in silos — a common challenge across the social impact sector. By working to clarify and strengthen line of sight around why internal communications were important and what issues required "fixing," she unearthed a deeper issue at stake: the power dynamics inherent in information-sharing. "That required me to not hold onto the 'how' of what it will take to deal with this challenge — the tools for communicating — and instead keep an eye on where we're trying to go and why, which brought in a focus on people as communicators."

> It can be really easy to not be aware that your thinking about the goal is changing or evolving.

Katie Grace Deane

When teams get stuck in the weeds or circle around a decision, line of sight can be a helpful grounding tool to reset and reframe the group. Katie Grace encountered this when changing organizational policies around travel expenses and reimbursement. In this case, the goal was to update an outdated travel policy so that it met the changing needs of the organization and was easy for staff to understand and follow. In the process of reviewing proposed revisions, the team got stuck on whether or not to switch from an expense reimbursement approach to a per diem model for meals and incidentals. Being able to step back and place that decision in the context of the line of sight — how do these options help us meet our organizational needs and what will the staff experience be — helped unstick a conversation wrestling with micro-level financial implications. "Having a line of sight helps pull us up out of challenging conversations and provide a frame to help make decisions by reinforcing what it is we're really trying to do," Katie Grace said. "It provides an opportunity to get really explicit about what's the most important thing here."

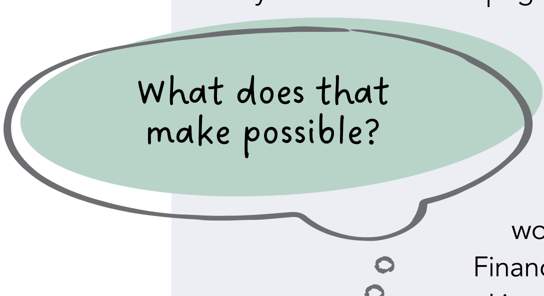
Creating and strengthening line of sight helps groups focus on what's most important in complex or tactical contexts. When people aren't willing or able to question their assumptions about strategy, it can be difficult to get to a shared line of sight. Part of the art of strengthening line of sight is the way it requires curiosity and humility — one can point out potential fuzzy language or assumptions underlying if/then hypotheses to strengthen strategy without putting people on the defense.

This practice requires creating a real sense of psychological safety to have deeper conversations about how strategies add up to impact, and it's part of the art of strengthening line of sight. In Katie Grace's example, the initial hypothesis was that if more internal communications tools were in place, then people would communicate more internally. "That turned out to be only part of the story," Katie Grace said. "Information wasn't evenly distributed. Those with information to share weren't sharing it, and giving them a tool wasn't going to solve that problem." The rigor of strengthening line of sight helped uncover this gap between the ideal state and the current reality.

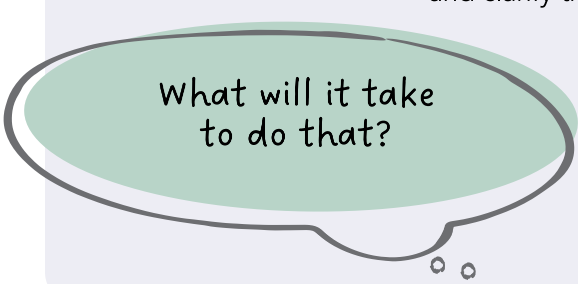
"The biggest learning I've had through thinking about line of sight is that the hypothesis for how to get to your goal can and should change. There's a lot of learning in how the path to your goal changes and why - and being flexible and willing to go along for the ride is a good thing."

Launching new strategies

Sarah Smith (2019), Director of Learning and Evaluation at BlueCross BlueShield of North Carolina Foundation focused on line of sight in her first year at a new organization. When she joined the team, the organization was going through a lot of change — new leadership, an updated strategic plan, and new organizational functions including learning and evaluation and operational excellence. During this time, Sarah relied on two questions: 1) What does this make possible? and 2) What does it take to get there? "Line of sight helps us get clearer on what our goal is, what we're aspiring to, our entrypoint and our tactics," Sarah said. "It helps to get everyone on the same page and looking in the same direction together. It was important to work toward clarity in our line of sight before developing an evaluation framework. Initially, some on the team may have been confused that I wasn't jumping into metrics and measurement."



Sarah used strengthening line of sight recently when working with the organization's Vice President of Finance to launch a new function on operational excellence. Line of sight helped make thinking visible and articulate goals and clarify the path in a way that went above and beyond a traditional theory of change.



Over the course of several meetings, Sarah worked with the Vice President of Finance to explore those two simple questions: What does that make possible? What will it take to do that? Through this, they were able to tease out the values, goals, strategies, and tactics they believed would help the BlueCross BlueShield of North Carolina Foundation have the infrastructure in place to help make North Carolina one of the healthiest states in the nation, in a generation. Exploring the line of sight surfaced hypotheses like "If we build in opportunities to get feedback from the community, then we can refine our concepts and improve the applicant experience." Having a line of sight for operational excellence — and the hypotheses that emerged as a result — helped the team prioritize work and identify opportunities to test different hypotheses for how they would accomplish their goals. This was especially important as this was a new function for the organization. The team plans to revisit this line of sight in the coming months and expects to further refine their hypotheses based on what they have learned over the past couple of years.

Line of sight is a powerful way to hold accountability for results.

Similarly, when working with programmatic staff, Sarah's use of line of sight has helped people uncover gaps in their own thinking or clarify and strengthen strategy. The principle of line of sight has begun to become institutionalized internally at the foundation. Program team members regularly use the question "What does that make possible?" in conversations.

Line of sight is a powerful way to hold accountability for results. "The clearer you can make to others your point of view, the more opportunities you have to strengthen your point of view," Sarah said. "It all comes back to accountability. Inviting others into the conversation [to strengthen line of sight] can make people uncomfortable to share power." The art and science of strengthening line of sight is leaning into that discomfort and helping groups continue to name and check assumptions about the goal and what it will take to get from where we are to where we are trying to go together.

Conclusion

Strengthening line of sight is about doing what it takes to develop a clear, shared goal and constantly using it as a beacon to guide us on the path and to help us learn and adjust as we go. Strengthening line of sight applies as much to planning our next meeting ("let's remind ourselves what we are trying to accomplish today") as it does to a multi-year strategic planning process. In this chapter, we have talked about why it is important and shared varied examples of what line of sight looks like in practice. In the process, we hope you have discovered why this is the first chapter in this *Guide to the Principles of Emergent Learning*. Strong line of sight is essential to getting to impact, and to the learning process that helps us get there.

Acknowledgments

We are deeply grateful for Marian Urquilla and Jennifer Gross who first introduced us to the concept of line of sight during the Advanced Results Count® Leadership Practitioners community of practice. Big thanks to the members of the Emergent Learning Community who were interviewed for and contributed anecdotes and wisdom to this chapter and helped review our content: Katie Grace Deane from the Lincoln Institute of Land Policy, Sarah Smith from the BlueCross BlueShield of North Carolina Foundation, and Felisa Gonzales (2018) with the Colorado Health Foundation.

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Line of Sight Worksheet

Created by: Marian Urquilla and Jessica Mindnich

Strengthening line of sight can be as simple as asking a question like "What are we trying to accomplish?" This tool can help you and your group work through reflective questions together that can then be used to develop a line of sight.

TIPS FOR DEVELOPING A LINE OF SIGHT

✓ When things are quickly and continuously changing, we need to remain flexible and agile while still having a sense of direction.

✓ A line of sight is not a result. Instead, it is the connection between a concrete, near-term change that you want to advance and that larger result. It requires you to continuously learn and pivot and the circumstances in which you are working to continue to evolve.

1. Within the next 18 to 24 months, what is a change that you want to advance? (Line of Sight)

2. At 18/24 months, what would tell you that the change you are seeking has materialized? What would be different? (Be concrete.)

HOW WILL YOU KNOW?

With the desire to create a clear line of sight, there is a need to reduce the fuzziness. These questions will help you crystalize your line of sight.

1. In the mid-term, how will you know that you are making progress toward your line of sight?

2. In the short term (1 to 3 months from now), what will tell you that you are headed in the right direction?

3. If you were going to try to track these short and/or midterm signals explicitly, what would that look like? What would you count?

4. What obstacles are you likely to encounter?

5. What actions can you take to help you mitigate or address challenges that you are likely to encounter?

6. What could you do within the next 3 months to make progress towards this change?

7. What would you need to do within the next 6 months to make progress toward this change?

8. What funding, people, new skills, and/or new organizational capacities will you need to advance the change you are seeking?

9. What will you to say "No" to in order to stay focused on your line of sight?

HOLDING A LEARNING LENS

It will be important to know what information — narrative and numbers — will tell you if you are on track and where you may need to shift or course correct. Think of these as lower-case "p" performance measures.

1. How will you know if you are making progress in the short and mid-term?

2. What could be measured or counted in 6 months-time to tell you that you are making progress?

3. What could be measured or counted in 12 months-time to tell you that you are making progress?

4. What will you need to do now to ensure that you will have the data — numbers and narrative — needed to assess the effectiveness of your strategies?

5. What structures will you put in place to ensure that there is time and space for learning, reflection, and iteration?

CHAPTER 2

Making Thinking Visible

By Rebecca Ochtera, PhD, MPH (2019) and Brittney Gaspari, MPA (2020)[1]

One morning over summer break, a friend told her son he couldn't bike over the long, high traffic bridge near their house to get a sneak peek at the new middle school he would soon be attending. Imagine her shock when her son came joyously bounding into the house that afternoon so excited to tell her that he actually could — and did — bike over the bridge to check out the school! At first, she was angry at this disobedience, but quickly realized it was actually a misunderstanding — he heard "not possible" when what she meant was "too dangerous." Luckily in this situation no one was hurt, and the lesson learned was an important one. Good communication is more than just saying something and assuming your meaning is understood. Make more than your words visible; make your thinking visible too.

MAKING THINKING VISIBLE

Making thinking visible is about sharing our beliefs, experiences, and/or reasoning behind our thoughts and ideas. It is about expressing the how, what, and why behind our perspectives and insights.

What does making thinking visible make possible?

Making thinking visible is central to better understanding, learning, and connection. When we make thinking visible — either to ourselves as part of self-reflection or to others as part of relationships, groups, and collaboratives — it clarifies and communicates how we uniquely understand an issue at hand, what we believe is impacting the issue, and what options might be available to help us best move forward. Making thinking visible matters because when it's prioritized:

We pay more attention to the human elements of our behaviors and our decisions. We can move from the *what* of an issue into exploring the *how* and *why* of an issue. This supports deeper listening, active questioning, and more meaningful conversations that help us move from emphasizing *what we know* to emphasizing *what we collectively understand.*

[1] The year a practicioner joined the EL Community.

> It's not about finding the one right path or even continuous 'success'. It's about laying all the multiple truths on the table...to determine what is next.

We create space that encourages participation, acknowledges a diversity of experiences, and helps make it acceptable to hold more than one truth. Making thinking visible, when practiced well, promotes conversations that share ideas rather than just facts and encourages people to share different perspectives on a topic or issue. When we recognize different viewpoints as valid and valued, we are more likely to get curious, experiment, and try options out rather than insist that we need a right answer in order to make a decision or move forward. These shifts help us build an organizational culture that is ripe for learning and can be especially important when we are working to tackle complex issues where right answers most often don't exist. As Anne Gienapp (2014), Research Lead at King County Metro, explained, "The work of transformative social change is complex, and it requires constant adaptation, and responding to external dynamics outside of our control. It's not about finding the one right path, or even continuous 'success'," she noted, "It's about laying all the multiple truths on the table and helping those in a shared endeavor to understand the complexity/bigger picture to determine what is next."

We can work toward common definitions, language, and success markers around an issue. Through the process of sharing our thinking with each other, we can often create a common context that builds a shared understanding and shared language for the issue or topic that brought us together. In both work and personal life, shared language is critical for effective communication and collaboration. It helps make sure our intentions are understood, tasks are completed as intended, and we track our progress in a way that is consistent with the things we hope to achieve.

What does it look like when making thinking visible is present or absent?

There are patterns and behaviors that tend to show up when thinking is visible, as well as when it is not. Here are some signals that can help you identify if making thinking visible is currently a part of your work or personal life:

Present	Absent
✓ People are encouraged to ask clarifying questions and answer in a spirit of greater understanding.	✗ Individuals or groups jump to solutions without examining or discussing underlying assumptions.
✓ People's shared insights or ideas are met with curiosity and deep listening instead of being negated or met with defensiveness.	✗ People are afraid to give their opinions or ask clarifying questions, which can further fuel inequity and power imbalances.
✓ People are open to differing ideas or opinions and don't take offense or feel a differing opinion means their own opinion is considered wrong.	✗ Goals are left vague, sometimes purposively, so that no one feels left out or there's room for multiple interpretations (a good intention but difficult environment for learning and progress).
✓ People can take information from the perspectives uncovered and generate informed ideas for how to move forward.	✗ Teams have confusion about a project or strategy (how to implement, how to know if progress is being made, etc.) that slows implementation, muddies tracking, and leads to re-work, wrong work, or reduced motivation to implement the work.
✓ Advocating for different approaches or actions is seen as productive for determining the best path forward.	

EXAMPLES FROM EMERGENT LEARNING PRACTITIONERS

We talked with members of the Emergent Learning Community and looked through available Emergent Learning documents for good examples of making thinking visible in practice to share in this chapter. As part of this effort, we found making thinking visible examples in a wide range of environments. Below we provide a few of these examples, with links to the tools or resources Emergent Learning practitioners used to promote making thinking visible in diverse and unique ways.

Making thinking visible in teams and programs

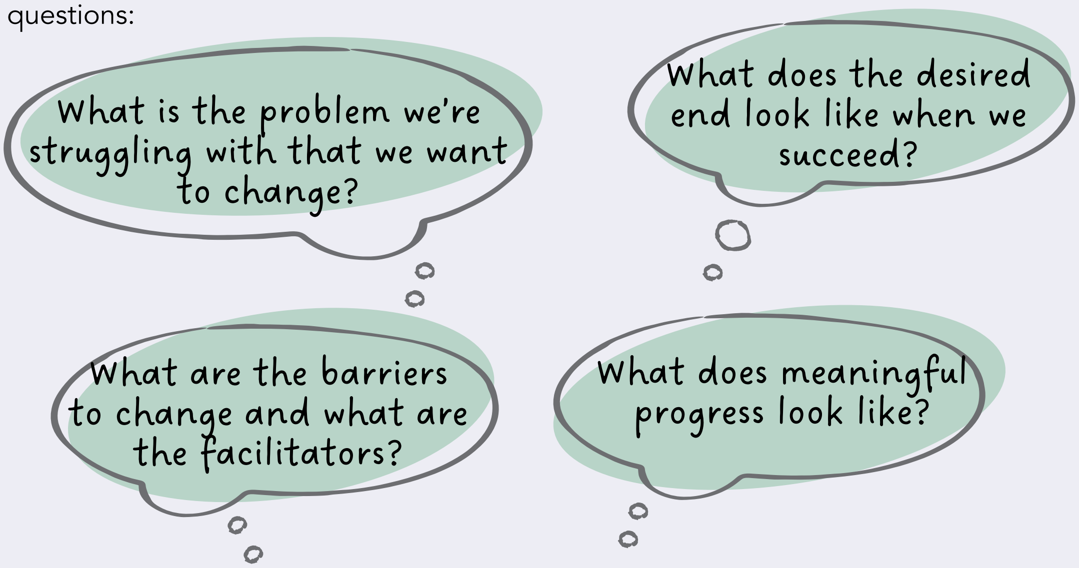
While working in different settings, Brittney Gaspari (2020), in her former role with The Winston-Salem Foundation and Stephanie Teleki (2020), Director of Learning and Impact for the California Health Care Foundation, both introduced Emergent Learning as a strategy to support programmatic priorities and decision making within their organizations. At The Winston-Salem Foundation, the entire program team comes together with senior leadership to discuss their programs on a biennial basis, using an adapted Emergent Learning Table.[2] Each program officer shares data and stories from the past two years related to their program experiences and progress. The full group reflects on the data together and shares insights from their different organizational perspectives about the past, and what may be possible in the future. Through this process, the lead staff member and others make their best thinking visible to each other and the program officer benefits from hearing multiple perspectives from individuals who are adjacent to their work. Program officers then use this collective thinking to identify and share back their decisions for the next steps of their program.

The California Health Care Foundation has a similar review process (also using an adapted Emergent Learning Table) with lead programmatic staff, then with senior programmatic leadership and, finally elevating the conversation to its board of directors. In this way, program staff make their thinking visible to the board, and the board has an opportunity to engage with the work at a more strategic level versus only approving individual projects. Each of these engagements create important opportunities to pause, step back, make thinking visible, and move forward together through collective learning. Stephanie noted, "Systems change is so complex that it's hard to get the human mind around it without some structured way to think and learn together. Emergent Learning is helping us to have a structure," she said, and "these simple practices are making it possible for us to be much more disciplined in our learning conversations."

Emergent Learning… is making it possible for us to be much more disciplined in our learning conversations.

2 For more on Emergent Learning Tables, see https://emergentlearning.org/practices/

In his role with The Pew Charitable Trusts, Josh Joseph (2021) developed and used a tool for explicitly making thinking visible with a diverse range of groups and stakeholders.[3] This tool derives from but elevates a Theory of Change and shares alignment with the practice of Before Action Reviews (BARs).[4] It helps people get clear on strategy by specifically emphasizing dialogue around four core questions:



While dialogue on all of these questions is important, Josh has found exploring barriers and facilitators related to participants' experiences is critical for sorting and prioritizing strategic decision making.

According to Josh, people can often articulate a problem and their desired ends but haven't always reflected deeply on why past efforts have fallen short or how current approaches will avoid similar pitfalls. By doing so, groups can build from lessons learned and avoid investing in solutions that they already know are less likely to work. Making thinking visible in this way can help people invest in what can best help them move forward versus what theoretically they like or want to see as the solution. This approach also helps people understand that they already have experience and insights to build on. It contributes to participants feeling they have "skin in the game," which is key to connecting someone personally to the work. Making thinking visible also helps give credit to both success and failure as simply a part of learning and improving — helping us better identify places in the work that need clarity and facilitating dialogue that can help a team, group, or organization progress past their current state.

[3] A copy of this tool is included at the end of this chapter.

[4] For more on Before Action Reviews, see https://emergentlearning.org/practices/

Making thinking visible in community work

Beyond internal organizational practice, making thinking visible is also an important for organizations in advancing work externally in communities.

Layla Garms (2021), Program Officer, Equity in Education at The Winston-Salem Foundation, provided an example of how using a Before Action Review with two community partners made thinking visible and advanced their collective work in local education. The Foundation decided to fund work between a large community institution and a smaller nonprofit organization. While the typical approach would be to fund the work and wait for the groups to figure out their relationship, the Foundation instead implemented a Before Action Review when the funding was approved to encourage collective dialogue early for the project. In Layla's words, "The BAR questions clarified the expectations and thinking of both partners up front so they could understand each other's perspectives and develop common expectations for the work going forward." She continued by explaining that "the one-hour structured conversation likely prevented months of fumbling around by creating space for the partners to make their thinking visible to each other. Not only were expectations clear, but the context of the work was more explicitly named, so that each partner could understand why the other was making certain decisions and taking certain actions."

> Not only were expectations clear, but the context of the work was more explicitly named, so that each partner could understand why the other was making certain decisions and taking certain actions.

Vanessa Samuelson (2019), Director of Learning and Reporting at the McGregor Fund, found that making thinking visible can benefit community projects by supporting deeper understanding between all organizations involved. Many organizations — both within and across systems — may be working to tackle the same community issue or support the same population. However, for a variety of reasons (e.g., funding streams, regulations, policy, etc.) the work of individual community organizations can often be siloed. Vanessa found the principle of making thinking visible helps organizations work better together in their support of a common cause. Making thinking visible, Vanessa says, "is critical in collaborative work particularly when it is hard to find commonality or traction. The assumptions, intent, experiences, and perspectives embedded in our individual and collective thinking are some of the most fertile places for exchange and learning. This principle reminds us to create space for them from the beginning."

Making thinking visible is critical to collaborative work particularly when it is hard to find commonality or traction.

Vanessa Samuelson

In an interview, Vanessa discussed how she has used visual mapping as a way of asking questions and encouraging dialogue that helped people working in different systems see themselves and others from a common perspective, in particular the perspective of the consumer they were all working to support in various ways. Vanessa noted that sharing visuals "can offer space for people to ask questions, compare, and challenge each other and in doing so decide what they are making visible along the way. Awareness, relationships, and insights foundational for collaborative work emerge as these conversations unfold." Through this type of exercise, organizations better see the interconnectedness of their work and use this collective knowledge to explore how to collaborate and adapt for greater community impact.

Making thinking visible to ourselves

While making thinking visible is most recognized and discussed as a group activity, it can also be a personal endeavor. Taking time for self-reflection about our own thinking is important for unpacking how and why something has occurred and for gathering insights into how we believe something can best move forward.

Tracy Costigan

Tracy Costigan (2018), Senior Director, Office of the Executive Vice President at The Robert Wood Johnson Foundation, wrote a case study (Costigan, 2020) about her year-long journey to develop an organizational strategic learning plan and build routines for staff to engage in learning practices. "Making thinking visible, even just to myself, was critical to developing my own learning practice," Tracy said, "in turn, allowing me to bring colleagues along in developing their learning practices and ultimately transform how we embed learning into our day-to-day work."

As part of her case study, Tracy highlighted using a personal Learning Log[5] to document *how* the work moved forward, not just *what* work moved forward. This Learning Log, kept throughout the year, held important documentation of key insights, assumptions, hypotheses, and actions from the project and created opportunities for real-time self-reflection for internal guidance during the project. As Tracy noted, "Keeping a Learning Log kept me grounded in my line of sight… at times when progress felt stalled, I could turn to the Learning Log to recall my experiments and the insights that these generated."

> Making thinking visible, even just to myself, was critical to developing my own learning practice.

Rebecca Ochtera

Heidi Sparkes Guber

Making thinking visible through self-reflection can also be an important first step to setting vision and direction with others. Rebecca Ochtera (2019), Director of Evaluation and Learning at Caring for Denver Foundation, piloted a new practice designed to help in her leadership and management role within the organization. With mentorship from Heidi Sparkes Guber, co-founder emeritus of Fourth Quadrant Partners,[6] Rebecca developed an annual "leadership letter" that makes her thinking visible to her staff, both as a reflection of the team's past progress and to set direction and expectations for the coming year. While brief, it provides critical information to help the team stay on track and highlights where each individual has unique strengths and opportunities for growth. In writing the letters, Rebecca was amazed at how much thinking about a year's worth of work she held internally. What she assumed were gut feelings or intuitions were, in reality, deeply embedded insights and learnings from the year. The leadership letter connected the dots. By taking the time to reflect in writing and share those reflections on the how, why, and what of the department's leadership work, Rebecca anticipates more clarity, focus, and success for the team in the upcoming year.

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5 For more on Learning Logs, see https://emergentlearning.org/practices/

6 Fourth Quadrant Partners transformed into the nonprofit Emergent Learning Community Project in 2023. For more information, see https://emergentlearning.org/history/

Things to consider

Making thinking visible, while powerful, isn't always easy. Obstacles do exist to the practice and good use of this principle; many of those obstacles have been shared by those in the Emergent Learning Community. Some examples are included below, along with practitioner insights to avoid or reduce these barriers in your own practice:

Organizational power structures can reinforce inequitable cultural norms around making thinking visible. Often individuals in power do not have to make their thinking visible to make decisions or take action, yet those with less power are expected to make their thinking visible to justify the actions they take. It can also be risky to share thoughts or opinions that don't reinforce the perspectives of those in power. This imbalance can lead to negative consequences in the workplace. Anne Gienapp described her experience in a past role, where there was significant confusion about its strategic plan. The plan was developed around a single leader's strong ideas, without making thinking visible to all staff. Because of this, staff were unable to develop a common line of sight. "Individuals' thinking gets shaped by so many things: their training, experience, whatever discipline they are part of, the organizations they have been a part of, and the ways of working in those organizations," reflected Anne. She noted that at times, "people's own thinking isn't visible to themselves because they are falling into the patterns of their organizations."

> At times, people's own thinking isn't visible to themselves because they are falling into the patterns of their organizations.

Shifting culture and power within organizations can be very challenging. Try to use what influence you do have within your organization to make your own thinking visible as an example and use powerful questions to assist others, when possible, in seeing their own thinking and articulating it to others.

Work and personal cultures that reinforce the idea of subject matter experts and traditional knowledge holders neglect the contributions of lived experience and non-academic expertise. Many of us have been trained from an early age to show up as listeners taking in knowledge from experts, not collaborators with important insights to share. We are used to being talked "at" and presented "to" as the way to gain knowledge rather than learning through the experiences and perspectives of all who participate. Finding ways to promote participation for all is critical to making thinking visible; the links throughout the examples section above are tools and resources that can help.

Conversation that encourages information sharing but not meaning-making limits the value of making thinking visible. Conversations intended to make thinking visible should create space for more than dialogue. Participants need opportunities to organize information shared and interpret the meaning of the conversation, not just talk to each other. In Josh Joseph's words, "people need to revisit their conversation, see it, agree or disagree, and then connect dots to move the thinking into visibility. There's no free lunch - people have to put in the time to make knowledge and information make sense." Set expectations that collective meaning making is part of the process and ensure there is time to pause, reflect, and unpack together what is evolving from the conversation. This is particularly important when making thinking visible is being used to set strategy or make organizational decisions.

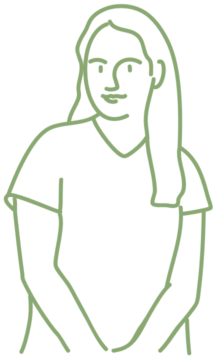
Inviting the "typical" players to the table can reinforce narrow perspectives and lead to blindspots in our thinking and actions. When we surround ourselves primarily with like-minded individuals who share similar beliefs, backgrounds, or experiences, we can miss important context and insights valuable for good decision making and strategy. Dr. Chera Reid (2016), Co-Executive Director of the Center for Evaluation Innovation, highlights the importance of becoming more proximate to communities that have been harmed by inequitable systems, so that the data and stories used to create insights are not limited to traditional definitions and perspectives of data. She describes making thinking visible as an opportunity to "widen the aperture" from where organizations get information to drive decision making. According to Chera, it is always important to consider and reflect on in a conversation: whose thinking is visible? And as you "put yourself in the story," do so in a way that is authentic and courageous. Organizations especially must make a commitment to make their own thinking visible to external audiences, especially those that have been, or will be, most impacted by their work.

A brief note on white supremacy culture and making thinking visible

In several conversations and shared documents, Emergent Learning practitioners noted important connections between white supremacy culture and making thinking visible. While the complexities of the connection would be difficult to address in this introductory chapter, we felt it was important to at least acknowledge the connection and provide a few insights around this issue from the Emergent Learning Community.

> EL is a subversive set of principles, practices, and tools that subtly invites individuals and organizations to make visible their assumptions about race, racial bias, and racial justice.

Milano Harden



There are many characteristics of white supremacy culture (Okun, 2022) that create barriers to making thinking visible, including the perspective of "only one right way" and the existence of objectivity. Making thinking visible can disrupt many of these norms. Milano Harden (2019), President and CEO of The Genius Group, identified in a community interview how the use of Emergent Learning tools and principles overall can make thinking visible by uncovering unconscious norms and bias so that these issues can be acknowledged and addressed. In Milano's words, "EL is a subversive set of principles, practices, and tools that subtly invites individuals and organizations to make visible their assumptions about race, racial bias, and racial justice." Milano continues, "This invitation to disrupt unconscious — but nonetheless biased — logics, and to begin building new norms that center racial justice and shared prosperity begin to disrupt old system givens. While these efforts use a more rational set of pathways, they make room for new and different ways of being and working together."

Alison Grubbs (2019), Program Director at New Pluralists, cited the role of making thinking visible as an antidote to the belief of objectivity and neutrality in a case study written while she was in a previous position (Grubbs, 2020). An individual's worldview and experiences affect how they understand things; taking time to make thinking visible is an important practice to uplift the varied data, stories, and backgrounds that influence our understanding of the world around us. She notes this principle can be an important complement to any organization's ongoing internal anti-racism work. It helps challenge dominant ways of thinking and can surface embedded paradigms that drive inequities when they go unrecognized or unacknowledged.

Taking time to make thinking visible is an important practice to uplift the varied data, stories, and backgrounds that influence our understanding of the world around us.

We chose not to offer generic suggestions or guidance for the use of making thinking visible in addressing white supremacy culture, as any intervention would need to be tailored to the unique context and characteristics of the organization or group involved. Instead, we hope this highlight will encourage readers to consider the potential role of making thinking visible within their own work and opportunities to address dominant cultural paradigms.

Conclusion

Making thinking visible is about making space for people to reflect on and say aloud the things we often leave unsaid.

Making thinking visible is about making space for people to reflect on and say aloud the things we often leave unsaid. This principle encourages us to dive deeper underneath our words (both in our group dialogues and our personal dialogues) to unpack what is driving our reasoning, motivations, and decisions. In doing so, we become better and more curious listeners for each other, make room for diverse perspectives and experiences, drive more consistent language and processes across our activities, and promote collective understanding in ways that drive more effective action. Many EL practitioners are finding creative ways to embed making thinking visible into their work in ways that have shifted personal thinking, organizational cultures, and even community practices. We encourage you to explore how making thinking visible can be a powerful learning principle in your next project, organizational strategy, or community endeavor.

Acknowledgements

We are grateful to the following for their insights and contributions to this chapter: Vanessa Samuelson, Chera Reid, Anne Gienapp, Tracy Costigan, Josh Joseph, Layla Garms, Milano Harden, Alison Grubbs, and Stephanie Teleki.

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THEORY OF CHANGE TEMPLATE

What is it: A theory of change is a high-level description of how an initiative is meant to work. It helps make thinking & strategy *visible*, sketching the anticipated path from current state to end goals and flagging key assumptions. The most useful TOCs also help to put an initiative's core strategies & activities into context, highlighting their importance in addressing barriers and enabling progress.

About this Template: Much of the template's value comes from a small set of questions it asks about how an initiative can be expected to support change. The questions aim to help teams download, discuss, and document their shared insights—in effect, making their thinking more visible to others. When groups can better articulate expected pathways to change, it benefits internal decision making and also makes it easier for funders, partners, and other stakeholders to engage constructively. These core questions and the suggested order in which they should be considered (steps 1, 2, and 3), are outlined below. When filling out the template, I suggest using bullet points and trying to limit the amount of information so that it fits on *one side* of a single 11x17 page.

Purpose of Your Initiative:

Key question to answer: *What does your initiative aim to do (what's the big picture)?*

Current State

(Step 1)

Key question to answer:
What core problem(s) will this initiative address (e.g., what's wrong, not working, or missing)?

Tips:
- Briefly describe the problem (or specific part of the problem) that the initiative is meant to address.
- Identify who is most affected by the problem and why addressing it matters.

Barriers & Assets

(Step 2)

Key question to answer:
What are the key obstacles to progress and what assets can be tapped (champions, resources, windows of opportunity, etc.)?

Tips:
- Ask why the problem hasn't yet been solved (e.g., what obstacles led past efforts to fall short).
- Flag potential assets that make the approach and/or timing especially ripe for this initiative.

Strategies

(Step 3)

Key question to answer:
What core strategies will help drive the initiative's progress toward desired ends?

Tips:
- What are your insights—why do you believe these strategies can make a difference where past efforts have come up short?
- Ensure that proposed strategies account for the barriers and tap the assets you identified in Step 2. If not, are you missing something critical?

Activities

(Step 3)

Key question to answer:
What activities, tactics, or actions needed to support and carry out the proposed strategies?

Tips:
- Consider why the proposed activities make sense for this initiative and are essential to support the strategies you've identified.

Progress

(Step 2)

Key question to answer
What early-stage changes would indicate or enable meaningful progress toward end goals?

Tips:
- Ask what "momentum" looks like. What changes from the current state would suggest that things are moving in the right direction?
- Look beyond quantitative measures to consider shifts in attitudes, behaviors, interactions, etc.
- What might suggest the initiative is off track or not working well?

Desired Ends

(Step 1)

Key question to answer:
What are the end results/outcomes that your initiative aims to achieve? Over what time period?

Tips:
- Ask what "success" looks like. What improvements over current state will the initiative make possible if it succeeds (e.g., what specific parts of the problem will it address or solve)?

Alison Gold

CHAPTER 3

Asking Powerful Questions

By Alison Gold (2021)[1]

Questions are powerful. They are tools that enable us to do so many things: from gaining basic information to making sense of the world around us; from building intimacy with another person to increasing understanding of communities and cultures. Questions can be used for discerning our own feelings and where they come from and hearing other individuals' points of view and experiences. They can be used to explore critical ideas in science, history, philosophy, and religion (and many other disciplines); surface unspoken truths and dynamics among people; raise critiques of the *status quo* (and critiques of those critiques); and imagine and envision different possibilities and futures.

The Emergent Learning principle of **asking powerful questions**, on the surface, seems quite straight forward. However, putting this principle into practice successfully requires a range of skills. This chapter is based on my discussions with four other Emergent Learning practitioners who work in different sectors, organizations, geographies, and issue areas, and who have different roles and identities. My colleagues' wisdom — which I've shared in their own words throughout — is the basis for this chapter which explores five questions:

What does it mean to ask powerful questions?

What does asking powerful questions make possible?

What does it look and feel like when people feel free to ask powerful questions?

What does it look and feel like when the culture does not support the principle of asking powerful questions?

What factors contribute to creating a culture where asking powerful questions is possible?

[1] The year a practicioner joined the EL Community.

What does it mean to ask powerful questions?

Questions are a critical part of the practice of Emergent Learning and they are a component of all the practices that make up the EL platform. Asking powerful questions is not so much about the questions themselves; it's when, why, and how we ask them.

> If evaluation is the retrospective look, and strategy is forward-looking, then Emergent Learning is really what unites the two.

Devon Winey

In Fourth Quadrant Partners'[2] (2019) foundational work on Emergent Learning, the principle of asking powerful questions was described as "The ability to listen to conversations and recognize when asking just the right Emergent Learning question…will help people explore their thinking more clearly, help them access their shared experience, or consider ideas that might otherwise be ignored."

Some Emergent Learning practices focus more on questions connected to specific activities — like Before and After Action Reviews. Others, like Emergent Learning Tables and Learning Agendas[3], play the critical roles of clarifying what teams are seeking to understand and find answers to over longer periods of time.

Together, the questions embedded in each of these practices are mechanisms for groups to socialize their learning. EL questions enable this by creating an invitation for people to share what they have observed and believe those observations mean, recognize how their collective thinking is changing, and articulate what new hypotheses are emerging in their work.

ASKING POWERFUL QUESTIONS

> The ability to listen to conversations and recognize when asking a powerful Emergent Learning question...will help people explore their thinking more clearly, help them access their shared experience, or consider ideas that might otherwise be ignored.

What does asking powerful questions make possible?

The principle of asking powerful questions shows up in Emergent Learning practice in a number of ways. Katie Grace Deane (2018) of The Lincoln Institute of Land Policy reflects that the principle has helped her and colleagues get beyond top-down approaches to problem-definition and solution-identification.

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2 Fourth Quadrant Partners transformed into the nonprofit Emergent Learning Community Project in 2023. For more information, see https://emergentlearning.org/history/

3 For more on BAR-AARs, Emergent Learning Tables, Learning Agendas, and other Emergent Learning practices, see https://emergentlearning.org/practices/.

Asking questions invites other people to participate in the solution in a way that starting with a statement doesn't…there can be a real tendency to say, "I've identified a problem, here's a solution." But there's a whole bunch of assumptions that would be embedded in both the articulation of the problem and the articulation of the solution. If [instead] you go from problem to question and get other people to think about what that right question is, it leads [everyone] to think differently both about the problem and about the solution.

In addition to inviting other people to think more deeply about problems and solutions, asking powerful questions helps to create greater clarity in other ways. Devon Winey (2017) of the strategy and evaluation consultancy Mt. Auburn Associates reflected that, in her work, "individuals and organizations often talk in fairly lofty, aspirational terms when describing what they are trying to achieve. Powerful questions can help ground these conversations by inquiring, 'What does that look like?' 'What hypotheses are you holding about how you will get there?' 'What's the data behind that like?'" Devon noted this "lets us move away from fuzzy language and get to the reality of what the work actually means."

[Powerful] questions really place within the individual the agency to dream...

Beyond nurturing shared understanding of problems, solutions, and strategies, Terry Whitfield (2021), a program officer at the Skillman Foundation, described the principle as meaningful in his work with colleagues and community members because it expands people's thinking and sense of possibility. Terry said, "Some of these questions really place within the individual the agency to dream and to imagine and to really put forth what their best idea might look like within the context of the conversation."

According to Omar Carrillo Tinajero (2019) of the Center for Community Investment, asking powerful questions also opens up those who hold power and authority and may resist changes to the status quo. He noted that this principle "creates openings to propose different ways of thinking or doing things so that people who would ordinarily fear loss might be more receptive to [these ideas]."

Katie Grace offered another great insight: "Powerful questions help people who are broad and expansive in their thinking get more targeted and people who are targeted get more expansive."

What's the data behind that like?

What does that look like?

What hypotheses are you holding about how you will get there?

WHAT WILL IT TAKE TO ADDRESS THE GREATEST SOCIAL, ECONOMIC, AND ENVIRONMENTAL CHALLENGES IN THE WORLD TODAY?

- **Work** collaboratively with other people to define problems and identify solutions.
- **Develop** a shared understanding of strategy and goals.
- **Nurture** a sense of possibility for the future among everyone from community members who experience the most acute impacts of problems to people with power and authority who are most resistant to disregarding the status quo.[1]

The feminist psychologist Jean Baker Miller defined power as "the capacity to produce a change" (Guinee and Knight, 2013). Asking powerful questions can catalyze and contribute to groups taking these necessary steps in order to produce change, and that is why it matters.

What does it look and feel like when people feel free to ask powerful questions?

Emergent Learning practitioners skilled in the principle of asking powerful questions have all noticed what difference it makes when the principle is highly present.

In my own work, one indicator I've observed is that everyone from the youngest to the most experienced in a group — from the person with the least authority to the Executive Director or CEO — are actively contributing questions and offering observations and interpretations. Sometimes the ideas that push the group's thinking the most come from the least expected people.

Omar shared that when the principle is being embraced, there's a "willingness to put all the barriers aside for a minute and just think about what an ideal situation might look like." He noted it's "not in a utopian [way where] we're pretending everything is perfect. But, in a way in which we're able to better understand what it is we're after and then more clearly articulate what we might do to get there." Terry noticed "there is an energy that comes. People want to engage in meaningful conversations that they believe will help move their work forward. So, there is something exciting when…you can ask a question that helps to encourage a person to think beyond where they might just be resting at that time."

> Sometimes the ideas that push the group's thinking the most come from the least expected people.

1 This is an example of the kind of question/answer dialogue that powerful questions generate. Each answer is actually a hypothesis that can be explored and tested.

Powerful questions are powerful because they plant seeds.

Importantly, Omar pointed out that the impact isn't always immediate or in the room. He said, "There's something about the principle that creates an opening for potential longer-term reflection. I think in our work and our culture, and even the way we talk about EL, [we think] there's an event, and we develop our insights there, and then immediately believe the next steps will be apparent." However, Omar noted, "I have seen how asking folks a question like 'What would it look like if you tried that?' Or 'what would that make possible?' may not immediately yield a

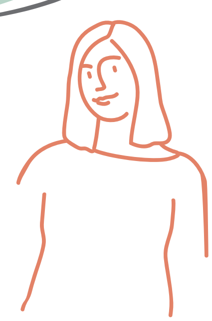
What would it look like if you tried that?

different approach, but can spark a different way of thinking. And then," he continues, "weeks or sometimes months go by, and folks come back and say 'we really thought about this question that you posed and we want to experiment by trying X thing." Omar reflected that "powerful questions are powerful because they plant seeds that we may not see germinate for a little while and that's fine."

To summarize, when the principle of asking powerful questions is highly present among a group of people working together, EL practitioners have observed that groups nurture shared understanding of problems, solutions, and strategies; there's agency to dream and imagine things differently and people are willing to do it; there's safety for all people — regardless of age and role to participate and respect for the contributions people are making; and there's a positive energy in the room. Sometimes the power of the question isn't so immediate, and instead enables a group to participate in ongoing and deeper reflection.

However, when the principle isn't present, it feels markedly different.

What would that make possible?



When culture does not support learning,
the very same questions meant to encourage learning
can get asked in a way that reinforces power dynamics
or shuts down imagination.

What does it look and feel like when the principle of asking powerful questions is not present?

More often than not, the questions that could open up our thinking are not being asked — whether that's in workplaces or homes, in community meetings or government hearings or business offices. Or, they are being asked, but not in the spirit of inquiry, discovery, and learning.

The principles of Emergent Learning speak about organizational or team culture and how it either enables or impedes learning. When culture does not support learning, the very same questions meant to encourage learning can get asked in a way that reinforces power dynamics or shuts down imagination. When this happens, it can dampen enthusiasm for asking questions at all.

Omar observed how questions can turn into manipulation or deflection of responsibility by those with more power and authority. "I've seen it used in a way that can put the onus on folks who may be experiencing the issue most acutely to be responsible for both raising an issue and be ready with potential solutions." He continued, "Then, if those people are not ready with a solution, it can be used as a way to shut down the issue that folks with less power raised. I think that's very clearly against the spirit of the principle." In contrast to when everyone — regardless of identity or role — is contributing openly and their contributions are respected, this misuse of powerful questions indicates to those who are in the down position of power dynamics that they are not safe.

Katie Grace described how, in an environment where people are ambivalent about the work or strategy (i.e., where the line of sight is weak), "the information you're going to get…is not going to be super helpful" and the questions can create an energy-sucking dynamic for everyone involved. "In some cases, the questions that drive personal engagement and institutional strategy may not be aligned." When faced with this, Katie Grace suggested considering different questions: "How do you help people figure out what it is that drives them? How do those personal drivers relate to where the institution is going?"

Sometimes powerful questions are not asked because a group believes there is only one explanation or possibility for what they are observing. Omar commented, "In our space of [community] investment, folks are committed to a story that lack of funding and money is the only barrier. And it is an important one." However, Omar noted, "this limits our options and avenues for change because oftentimes the path to getting that funding can be carved out in different ways. When we start working with teams we'll ask, 'Funding [and] money aside, what are the barriers?' Oftentimes teams can't think past that."

While it can be demoralizing to work in an environment where questions are not welcomed or are asked in a way that reinforces power through our discussions, we identified some important factors that support the conditions where we can ask powerful questions of each other. The good news is: with attention and intention, a group can be moved toward the more positive and productive end of the spectrum.

What does it look like when asking powerful questions is present or absent?

Present	Absent
✓ Asking questions becomes culturally accepted, recognizing that the goal is not to challenge, but to understand.	✗ When the culture does not support curiosity, asking questions reinforces power dynamics or shuts down imagination.
✓ Groups nurture shared understanding of problems, solutions, and strategies.	✗ People advocate for their positions or solutions (sometimes disguised as questions) rather than engaging in deeper inquiry first.
✓ Everyone, regardless of positional authority, actively contributes by asking questions. Great ideas come from the least expected people.	✗ People ask questions that call for information or research, rather than exploring their own thinking-in-action.
✓ There is greater energy and engagement and more reflection. People discover together what questions matter the most now.	✗ Not asking a question may mean that a powerful opportunity to learn gets missed.

What factors influence a culture of asking powerful questions?

In many ways, the factors that make it possible to ask powerful questions are the same as those foundational to the work of group facilitators and facilitation. We also noticed that these factors are not necessarily clear or intuitive to all.

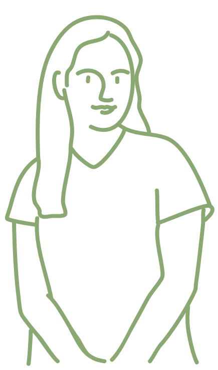
In the spirit of Emergent Learning, the next section aims to make the implicit explicit by describing some of the ways EL practitioners identify a group's readiness for asking powerful questions and facilitating learning among that group.

Context and group readiness for asking powerful questions

Maybe it's because I'm trained as an anthropologist, but I've found few practices and frameworks in social change work (and otherwise) encourage us to think deeply and strategically about how to build capacity for or adapt the work to the context in which we're introducing it.

And that is critical for practicing the principle of asking powerful questions because, as practitioners described above, it is often the context and process by which these questions are introduced that distinguishes between supporting transformative work and reinforcing the status quo — or worse, resulting in defensiveness and closed-offness to dialogue at all.

Culture and group dynamics. Omar works with teams across the United States, and has noticed how culture and group dynamics matter for a group's readiness to engage with powerful questions.



I think part of Emergent Learning, and this principle in particular, is that there has to be a willingness to shift what we're doing, a willingness to change our minds, an openness to trying new things, and the space to do so.

An example is a group I was working with whose attitude was, "things are the way they are because it's really hard for us to do anything any other way, and we have tried everything, and nothing is going to make things different. And because we don't have x, y, and z, we can't try anything different. Also, we're very overwhelmed, so we can't change course to do anything."

I think there's a shutting down that happens then. They may very well be right because the work we're trying to do is so challenging. They're clearly overwhelmed or they may be responding to an emergency. And what you do in an emergency is to not develop possibilities; you just have to react. But I think that when folks are in a reactive or overwhelmed mindset like that, creating an opening through powerful questions is more difficult.

As a consultant, Devon reflected that for Emergent Learning to work, clients have to specifically sign up for it. "I've experienced some Emergent Learning sessions where we're really trying to make meaning of evaluative data that has fallen flat because there isn't a learning muscle with a client or organization and there isn't really even a desire to go in that direction," Devon shared. "Whether it's the role in which they hold me [as an outside consultant] or evaluation, or whether it's just the culture of the organization."

With practice, EL practitioners develop a sense of timing. They begin to notice small opportunities to try something new when they present themselves.

Organizations and team members who are collaborative, hold a shared purpose and commitment to achieving their group's mission, who are open to learning, and who are willing to embrace and practice different ways of thinking and processing are well-positioned to explore powerful questions (as long as they are not also trying to navigate a crisis).

However, if a group's dynamics and development aren't there yet, it doesn't mean all hope is lost. Instead, it means there is work that needs to be done to build the team's capacity. If the idea of asking powerful questions is introduced — implicitly or explicitly — before some of those capacities have been developed, and when the timing is not conducive, it can lead to people shutting down and becoming risk-averse. With practice, EL practitioners develop a sense of timing. They begin to notice small opportunities to try something new when they present themselves.

People's tolerance for working in a collaborative, learning-oriented way is informed by many factors. For instance, the culture and norms one grew up with can be wildly different than the ones of colleagues and collaborators.

About 10 years ago, I was working with a colleague with whom, if I'm being frank, I really struggled to work. He had grown up in a military household and his family was white, middle-class, and Protestant. From what I could glean, many of the decisions in his household were made by his father without conversation or input from the rest of the family. I grew up the daughter of a labor lawyer and sociologist in a family that was white, upper-middle class and Jewish — and we debated almost everything around the dinner table. From a young age, I was taught that debate and advocating for my point of view was part of the process of making decisions. Eventually, my colleague and I came to realize that our understanding of conflict was fundamentally different from one another.

Any time I disagreed or raised questions in our work together, he perceived it as disrespectful or that we were in an argument. I, on the other hand, perceived it as respectful and lively debate that leads to better decisions. But, it was only through building more understanding about one another that we were able to identify that these norms shaped by culture and family were not in alignment and contributed to our difficulties. We came to understand each other better and be able to engage with one another more successfully. This underscores the importance of understanding who we work with as whole people influenced by our lived experiences and identities.

Roles and training. In addition to cultural norms, the way we were trained and the roles we play can impact our readiness, willingness, or sense of ability to engage with powerful questions.

Some people have been educated in learning environments that introduce frameworks for encouraging understanding, critique, exploration, and discovery. They may be naturally drawn to work that engages with ambiguity and long time-frames. Others have been trained to value rigor, measurement and risk mitigation, and may find themselves in roles that reward those priorities. While many people learn to expand their interests beyond their original training in either direction — or find themselves in roles that challenge them to stretch their thinking — it is important to recognize that our education, as well as the expectations of the roles we play, can have an impact on our readiness, willingness or sense of ability to engage in ambiguity, inquiry and exploration.

However, understanding the ways that team members' identities, roles, and training influences how they engage with asking powerful questions alone is not sufficient. Why? Because the overarching realities of power dynamics and equity are part and parcel of working with any group.

Power and equity. The world today is amid a significant period of learning and change, reckoning, and — to a far lesser degree — repentance and repair around issues of power and equity. The power and equity dynamics among a group, among facilitators and group, and among "professionals" and community members are all ones that should be taken into consideration in Emergent Learning practice, as are authority and identity dynamics.

Both Katie Grace, who does this work internally with an organization, and Devon, who works as an external consultant, described how power dynamics that aren't known or recognized can derail the practice of asking powerful questions. Katie Grace shared how hidden power dynamics show up when "you have a learning question around a particular program, and you have identified a set of internal staff and consultants and participants in the program as having ownership of this question. But," Katie Grace said, "you don't recognize that one or two or three of those people have more ownership or more input or more expertise that's going to be respected or understood in a particular way based on who's ultimately [in charge of the work]." She continued, "There might be people saying 'I have data' and 'I have insights,' and 'I have hypotheses,' but not all input is respected or considered in the same way."

Devon put it more directly. "I think when there are already significant power dynamics at play in a group, the best damn questions are unlikely to facilitate a good learning environment. Additional pre-work and careful meeting design are needed to manage the dynamics in place."

DEFINITIONS OF POWER AND EQUITY

My favorite definition of **power** is "the capacity to make change." There are many forms of power (and many frameworks about power), but some of the most commonly identified forms of power include legitimate (or authority), referent (influence), expert, reward, charismatic, coercive, and moral (Hansen 2021).

My favorite definition of **equity** comes from the work of Petty and Dean (2017) who describe the concept of deep equity as the "need to understand and address [inequity and] its multiple systemic, structural, institutional, interpersonal, and individual/internal causes (both historic and current), and recognize the social construction of identity, power and privilege over time. Deep equity requires ongoing attention to hearts, minds, behaviors, and structures," in service of shaping a world where inequitable access to resources and outcomes based on belonging to an identity group — whether race or gender, religion or ethnicity, sexual orientation or gender identity, physical ability, age, class or skin tone — no longer exists.

> Pre-work and careful meeting design are needed to manage the dynamics in place.

Devon Winey

Recognizing your own role and the positional power that comes with it is critical to creating space for inquiry around questions that matter. Terry saw this play out in his own life and work when he joined The Skillman Foundation five years ago. He described how his relationship with colleagues and community members he had known for 10 years changed. "Now I've been at the Foundation for five years, but I think even after day five of being in the Foundation, I was looked at as somebody that was 'of the foundation,' that was 'of philanthropy," Terry said. "So, I always have to be super-mindful of the setup and setting the stage for the questions that I'm asking."

Emergent Learning and asking powerful questions at their best can help us heed the motto of the Disability Rights Movement: "Nothing about us, without us." But, among the practitioners I talked with, in working with community members, this is more aspirational than the current reality.

> I think it makes sense that those closest to the issue — who are experiencing it — should be part of identifying ways forward. That is a valuable principle and practice to have. But I think it's really easy not to engage with that practice mindfully, and genuinely. And I think a way to pretend or go through the motions is by asking questions, for which you don't care to really understand the answers.

This is something I've seen extensively in my own practice. For instance, I have done strategic advising work with teams of academics who are developing and running social change initiatives in communities. For many of them, their training — and the history of academia more widely — has been surveying community members in service of their academic goals and research, not considering what communities want or feel needs to be learned about the problems impacting them. By and large these interactions are transactional, the communities never find out what the collected data said or how it is being used, and communities are left feeling burned and exploited and, on top of that, nothing in the systems impacting them has changed. It makes community members less willing to work with their institutions or colleagues in the future.

All this said, what does it take to challenge these long-standing habits of thinking and working that reinforce traditional power dynamics? What will it take to create space for learning to happen around powerful questions in an equitable way?

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What will it take to create space for learning to happen around powerful questions in an equitable way?

Facilitating the group learning process

The first set of factors that practitioners identified focused on context. The other set of factors focused on facilitating the learning process once a group has stepped into the work, including holding space and building trust, different forms of talking and listening, and framing questions at the right time.

Holding space and building trust. EL practitioners emphasized that the principles and practices of Emergent Learning can't succeed in a vacuum.


Terry Whitfield

> Asking the powerful question, in and of itself, is not a strong enough tool to overcome the baggage that people bring into conversations. So, the trust building — building the space and dynamics that allow for people to be vulnerable in the conversation — allows them to be able to grasp and answer fully what that powerful question is is more important. Or else you just end up in the space where people are giving perfunctory answers because 'I don't trust you as the funder to do right by this information.' Or, 'I don't trust partner B, they're really not my partner.'

Terry emphasized some key pieces of the work have to be done alongside the practice of Emergent Learning: building trust among the learning team and between the team and the facilitator, and creating an environment where people feel it is safe to speak up and share regardless of power dynamics. And where, if someone violates that safety, there is an intervention, consequences, and repair.

Different forms of talking and listening. While practitioners raised the need for strong facilitation skills and trust building, another implicit component is that listening takes different forms and listening is a skill. Too rarely — particularly in white-dominant cultures — is this named, discussed or taught. But it is critical to the work of Emergent Learning.

Adam Kahane describes four different forms of listening and talking in his book *Collaborating with the Enemy: How to Work With People You Don't Agree with or Like or Trust* (2017): downloading (listening from myself and my story); debating (listening from outside — factually and objectively); dialoging (listening to others empathetically) and presencing (listening from the perspective of the larger system).

In the work of Emergent Learning and, in particular, asking powerful questions, we are working to move the group away from the more common ways of listening and sharing — downloading and debating — to dialoguing and presencing. In these forms of talking and listening, new possibilities open up and questions that emerge help boundaries between people disappear because we are engaged on behalf of the whole group or system.

For Terry, when a group is exploring powerful questions in the spirit of dialoguing and presencing, it looks like this: the energy in the room is generative, "so you're able to create a more perfect synthesis of what everybody is thinking and then everybody can see themselves represented in the answer, or in their final product." Terry goes on to say that this feels like "I'm not just moving with my own understanding, I'm moving with an understanding of everything that I bring." He notes that "given the right facilitation and the environment, you're able to let people just go and there's an energy that is awesome when people are responding to a well-placed, powerful question that doesn't just work at the surface."

Given the right facilitation and the environment… there's an energy that is awesome when people are responding to a well-placed, powerful question.

Framing questions at the right time and level. Another factor practitioners identified as important to the principle was framing questions at a level and time that matches where a group is at.

First, it is important to say that there is no absolute "right" in Emergent Learning. Something is right only inasmuch as it helps to move toward a goal in a particular environment. Implicit in our understanding of powerful questions is their openness in both structure and application. The most powerful questions don't have a "right" answer, but are open-ended enough to elicit thoughtful answers, and they are responsive and flexible to the needs and the direction that the group is going.

At Caring for Denver Foundation, Rebecca Ochtera (2019) was asked by the Executive Director to use Emergent Learning to help the organization move away from the silos they had created. Several team members had come to the ED with separate plans for increasing community engagement opportunities but the overall vision wasn't clear. Rebecca started by setting up a MURAL board (a form of electronic white board) with the team members and simply asked them, "What are we trying to accomplish?" and "What's it going to take to do that?" This exercise helped each team slow down and think about the bigger picture of their plans. Through asking powerful questions, they were able to identify a more efficient and collaborative strategy with a clear understanding of why the strategy mattered and what they could achieve as an organization through their collective efforts.

The most powerful questions don't have a "right" answer, but are open-ended enough to elicit thoughtful answers, and they are responsive and flexible to the needs and the direction that the group is going.

What are we trying to accomplish?

What's it going to take to do that?

In talking with other Emergent Learning practitioners, we all recognized that sometimes we're in the flow in asking questions, but at other times there's a mismatch between the question being posed and a group's readiness to engage with it or sense that it is the question that should be talking about at all.

Devon Winey explained how she has found three categories of powerful questions she uses most often. "One, when initial responses are at a 10,000-foot level, I use powerful questions to unpack it. (e.g., What would that look like to you?)." She adds, "Conversely, when an initial answer is in the weeds or laden with assumptions, I will use powerful questions to help identify either the hypotheses underlying the statement or to unearth the significance of the original answer (e.g., What would that help us accomplish?)." For her, a third category is "a lateral one, which is more of the 'why' questions, understanding contributing factors, or just making meaning of that initial response. I guess in all of them …the powerful questions are in the follow up." Devon observed, "I think I often use it as a way to dig deeper on something."

When you ask a question that is beyond where the group is at right now, and, you get silence for more than eight seconds; then the actual response might be "well, could you say that one more time?" or, "I don't understand." There is this outward pushback to the question. Because it's like three steps ahead of where the group might be at within the process that you're working through.

For me, it just forces me to think. "Okay, that was three steps ahead. How do I reframe the question in a way that meets the people or the person that I'm in conversation with where they're at?" And then by bringing it back to a more simple level, you give people an opportunity to work the muscle, which then lets you ask that next question…The initial question might eventually end up being the third or fourth question that you ask. Or, if you come back and pare that question back, you then create a whole new avenue and a whole new reality, that another question would emerge. And another powerful question could actually help move the group forward.

Katie Grace Deane believes that powerful questions don't have to be "superhuman." She noted that the question doesn't always have to be at the level of "'What will it take to get capital flowing into underserved communities?' because that's a huge question… You can have powerful questions that aren't at that level. When I think about my work on a daily basis, now I think 'where can I find a powerful question that will help people think differently about their work?'"

It is useful to remember that a question may be "powerful" in small ways. Devon reflected that, "I don't feel like I have been in a situation in which [asking powerful questions] has been transformative in and of itself…I mean I think of it is a way to help people filter information, make meaning from it and move on your line of sight to your next point, that's pretty good."

Holding space, facilitating different forms of talking and listening, and asking questions at a level and time that helps to move the conversation forward are all practices that can create fertile ground for Emergent Learning.

Conclusion

As you've probably noticed by now, this chapter was largely structured as a set of observations and insights from five experienced Emergent Learning practitioners who have different identities, training, roles, organizations, and who work on different issues in different geographies.

We are experienced enough in the practice of Emergent Learning and the principle of asking powerful questions to feel confident sharing our ideas, experiences, critiques, and concerns about practice this principle. And, we're humble enough to know that we're just five people and our experiences are not comprehensive. If this chapter brought up a powerful question, observation, story, insight, or hypotheses for you, we invite, encourage, and welcome you to share it with us as we continually expand (and share) our learning.

Acknowledgements

Thank you to my colleagues and fellow Emergent Learning practitioners for sharing their time, experience, and insight into the topic of asking powerful questions through interviews and review of this chapter: Katie Grace Deane, Rebecca Ochtera, Omar Carrillo Tinajero, Terry Whitfield, and Devon Winey. You truly are the co-authors of this chapter!

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CHAPTER 4

Maximizing Freedom to Experiment

By Lauren Gase, PhD, MPH (2020)[1]

Why does my stir fry taste so salty? Many of us enjoy experimenting in the kitchen; the freedom to experiment allows us to try to recreate something we had at our favorite restaurant, to test out new flavor combinations, and to find ways to improve upon our favorite foods. And, sometimes, as Emeril would say — BAM — you create a truly spectacular dish. However, other times, it just doesn't work out, and you find out the hard way that liquid amino acids are not a one-to-one substitute for soy sauce.

As this chapter aims to illustrate, there may be opportunities more or less ripe for experimentation — for example, maybe you don't try to create a whole new spread when you're hosting the holiday party. There may be bounds you put around what you try — for me, a decision never to use cilantro. And there are ways to create structures to help you get better — for example, making notes in your recipe books to continually improve toward the most delicious dish (let's just hope you can read all those notes!) So, with that, let's dig in.

What is freedom to experiment?

Freedom to experiment allows actors the freedom to choose the path — or hypothesis — that, on the basis of their experience and perspective, is most likely to lead to a desired outcome (Fourth Quadrant Partners, 2020). Paired with that, freedom to experiment is the expectation that actors will assess and learn from the results of their experiments; thus, there is accountability to use the information they gain to inform future action. Freedom to experiment is rooted in the ability to distinguish between the "what" (the goals or intended outcomes) and the "how" (the specific strategy or path to get to those goals). By distinguishing these two concepts, actors can choose a variety of "hows" to get to the "what."

FREEDOM TO EXPERIMENT

Actors have the freedom to choose the path — or hypothesis — that, on the basis of their experience and perspective, is most likely to achieve their outcome.

[1] The year a practicioner joined the EL Community.

WHAT DOES FREEDOM TO EXPERIMENT MAKE POSSIBLE?

Maximizing freedom to experiment unlocks a number of potential benefits, both in the process itself and outcomes achieved. In developing this chapter, EL practitioners shared a number of powerful stories that help make the benefits of this principle come alive.

Maximizing freedom to experiment can:

- Create space for actors to bring diverse perspectives and ideas to the table.
- Create a more collaborative, fun, and generative atmosphere.
- Foster shared ownership and buy-in.
- Give actors an opportunity to align their passion with their commitment.
- Increase staff's productivity and job satisfaction.
- Build a broader and deeper understanding of an issue, challenge, or opportunity.
- Identify and advance innovative ideas.
- Create conditions where groups with different ideas about action can still work effectively towards joint outcomes, instead of having to adopt a single agenda and course of action.
- Compare and contrast the success of multiple solutions, to learn which are more effective.
- Create the conditions to learn faster and better.
- Support innovation and allow groups to identify impactful solutions.

What does it look like when freedom to experiment is present or absent?

Present	Absent
✓ There is a clear distinction between the goal and the strategy or plan to get there and people in the whole system know that they are able, if not encouraged, to experiment with different approaches and/or to shift gears if something is not working. ✓ There is an expectation that they and everyone else will learn from these experiments.	✗ Members of the system are expected to align their resources and/or follow a prescribed set of expectations about how to implement the initiative, program, or project. ✗ There is a lag time between early indicators that something is not working and when the approach gets adjusted.

EXAMPLES OF FREEDOM TO EXPERIMENT IN ACTION

Depending on the context, experiments can vary vastly in size, from micro experiments we do every day to large, rigorous, highly visible efforts. As the stories below illustrate, experiments can be conducted by a range of actors; for example, an individual, team, organization, network of organizations, or a diverse coalition.

In terms of process, freedom to experiment creates space for actors to bring diverse perspectives and ideas to the table. By enabling broad participation, the principle supports the notion that all actors — regardless of position, title, or background — have wisdom to contribute. Setting the stage in this way creates a more collaborative atmosphere and fosters shared ownership and buy-in.

madeleine kennedy-macfoy (2021) shared a story of integrating freedom to experiment into the process of planning a virtual conference. Given that the conference had never used a virtual medium before, madeleine wanted to ensure the process provided a space for participants to think more expansively. By presenting the planning process as an opportunity to experiment, she "took some of the pressure off" the group and set the stage for a more collaborative, easeful, and fun experience. There was freedom to experiment in both how the conference would run as well as how people worked together. Team members were encouraged to make suggestions and share ideas about areas of work they would usually not be involved in. As madeleine described, "team members looked forward to the opportunity to bring their diverse ideas to the planning meetings and found they were able to break out of old assumptions, mental models, and perceived areas of expertise. Planning meetings were characterized by plenty of laughter, light conversations, and sharing of even the most 'out there' ideas." madeleine reported that the online conference was a great success. It integrated arts and creativity alongside deep content. Because it was online, a wider range of guest speakers and hundreds more people could participate.

EXPERIMENTATION CAN BE DONE IN MANY DIFFERENT CONTEXTS

For example:

- A coalition with different types of organizations working to end homelessness.
- Units within an organization trying different strategies to reach underserved populations.
- Members within a team trying different teaching techniques or approaches.
- A practitioner adapting and testing approaches to communicate research results.

Freedom to experiment gives participants an opportunity to align their passion with their commitment, therefore building buy-in. By planning the strategies together, actors have the space to bring their creativity and capabilities to the work. Instead of asking partners to adopt a pre-defined solution, they can define their own path, following their own passion, toward the intended outcome.

Nancy Pole (2019) described the work of a philanthropic funder network in Quebec working to address inequity. In her role as co-coordinator of the network, Nancy encouraged members to self-organize into groups to define strategies to reach the network's common goals. As Nancy described, "avoiding a single planned-out pathway helped to foster distributive leadership throughout the network; funders of different sizes and profiles were on equal footing. This approach allowed the group to experiment with ideas with mixed levels of support, such as forming and incubating a funding collaborative, and left space for adaptive and emergent action." Because members were encouraged to experiment, they were more willing to try out different ideas. Moreover, network members were able to cluster and commit to strategies that motivated them.

Avoiding a single planned-out pathway helped to foster distributive leadership throughout the network.

> Freedom to experiment can also make it possible to learn faster and better.

Freedom to experiment can create similar benefits of building ownership and buy-in when applied at an individual level. Marisa Allen (2016) described employing a freedom to experiment mentality in managing a team of professional evaluators. She described her approach as "supporting staff in understanding the expected project outcomes and my expectations associated with the outcome, but providing autonomy in how staff get there." This supported her staff to feel empowered to test out new approaches, which is a well-documented strategy to increase worker productivity and job satisfaction (Pink, 2011). This approach mirrors the idea of "Commander's Intent" developed by the United States Army in which the commander explains not only the task, but also the purpose (why the task is important, explained so that the subordinates can pursue their goals even if events do not unfold as expected), and the end state (the desired results). This explanation allows soldiers to adapt and experiment to meet their immediate challenge (Darling, Parry, and Moore, 2005).

By creating space for broad participation and diverse ideas, freedom to experiment can support groups in gaining a broader and deeper understanding of an issue, challenge, or opportunity. The principle allows groups to take their own context into account and identify strategies to understand "what will it take to make that idea work here?" Freedom to experiment can also make it possible to learn faster and better. If everyone is pre-committed to a fully aligned course of action, then it is harder to compare and contrast the impact of different strategies, and it takes actors longer to notice if something is not working. In contrast, freedom to experiment allows space for multiple, competing hypotheses, which enables groups to take collective action without agreeing on a singular right path. Freedom to experiment is well suited for complex situations where the solutions or best courses of action are unknown in advance. Groups can explore ideas that may never have been on their radar and achieve outcomes that they never thought they could, thereby supporting greater innovation.

Ray Gordezky (2015) provided an example of a school board planning process in Ontario. During the convening, Ray described how he "created a space with diverse voices, cultivated a shared line of sight, and allowed groups to self-organize into action-focused working groups to generate strategies." One of the ideas that participants developed at the convening, and came to fruition after several years of work, was the creation of a provincial Ministry focused on children, a systemic strategy to improve student success and change the underlying dynamics that undermined school boards' efforts to enable school children to reach their full potential.

> What what will it take to make that idea work here?

Creating a provincial focus on children was not the purpose of this convening. Ray described that freedom to experiment "allowed the group to commit to this outcome and provided latitude to turn their idea into a reality."

Kelci Price (2015) mentioned an example from Buurtzorg, a healthcare organization in the Netherlands with a nurse-led model of care. Each home care team can experiment with how they do their work and autonomy to innovate how to make their work better, with the expectation that they bring their innovations back to the whole. One group identified success in how to prevent falls among elderly patients. Because they had a mechanism for returning learning to the system, they could share their success with other teams, and the innovation became widely adopted throughout the country (Laloux, 2014).

Rex Fyles (2018) provided an example from Gender at Work in which education unions in seven African countries worked to reduce school-related gender-based violence. The Gender Action Learning process brought together change teams from nine teachers' unions. The structured series of meetings had freedom to experiment baked in from the beginning: change teams within each union were asked to develop experimental change projects that would be appropriate and effective in their highly diverse contexts.

Teams tested a wide range of strategies, such as community engagement activities, union-based changes, and lobbying and advocacy efforts. Examples included implementing a peer-to-peer training model to change teachers' attitudes, lobbying the government to create guidance and counseling departments in all schools, and reducing the number of times that victims or witnesses of sexual misconduct were required to testify in disciplinary hearings. The process required teams to bring what they were learning back to the system, sharing their experiences and stories to support next steps. Rex described the work of facilitators to "cultivate a safe space where participants could share their struggles, what they were testing, and what did not work."

Importantly, the strategies they developed came from them. The experimental approach contributed to shifting union members' mental models: they changed how they saw their role, took ownership of the problem, and fundamentally changed the way that they approached the issue. As a result, unions implemented a range of systemic changes; for example, positioning themselves more publicly at the forefront of efforts to end school-related gender-based violence, developing onboarding processes that made their stance clear, and strengthening accountability mechanisms for perpetrators.

The project was successful because the participants had a shared line of sight, the need/impetus for addressing the problem was high, and the participants had shared lived experiences as teachers, union members, and parents of learners. The project benefited from a systems framework, creating conditions to make the elimination of school-related gender-based violence a priority (e.g., for national ministries of education), and centering the vision to make the prevention of school-related gender-based violence a self-funded and sustainable "part of the union's DNA."

What are potential unintended consequences of freedom to experiment?

With all these amazing benefits, you may be inspired to maximize freedom to experiment everywhere. However, it is important to consider some potential unintended consequences and misuses of this principle.

Ending up with misaligned "experiments" that don't yield learning. How do you avoid generating a bunch of very different, unaligned strategies that are all going in their own direction and not contributing to the overall outcome? With freedom to experiment, there is a potential for actors to take freedom to the extreme and wander off in their own direction. As Marilyn Darling sometimes describes it, "1,000 flowers blossoming." This is particularly risky in the absence of a clearly defined shared goal, or with a goal that is so broadly defined that essentially any course of action can arguably be justified. For example, criminal court judges experiment every time they hand down a sentence. They use their judgment of what is most important in the case or their perceptions of sentencing effectiveness, but typically this is not accompanied by shared goals, mechanisms to evaluate whether the sentence is effective, or means to adjust their sentencing practices based on learning from outcomes. Is it any wonder that the criminal justice system is plagued with unfair and ineffective practices that contribute to racial disparities?

Similar challenges can emerge in settings heavily influenced by notions of academic freedom or emergent strategy which, in both cases, result in a hesitancy to define goals in advance. Practitioners described numerous examples of initiatives where goals were expected to emerge over time and, therefore, created an environment where it was difficult, if not impossible, to make sense of diverse experimentation. In some cases, it led to bickering over goals and a competition for resources.

Experimenting without drawing on existing evidence wastes time and resources. A related challenge is the potential for actors to use experimentation as a rationale for doing whatever they want. One practitioner mentioned the mentality she sometimes encounters: "I want to do it this way. And my justification is that I'm experimenting and learning." But experimentation needs to be accompanied by rigorous rationales about existing evidence: why this type of process might work, what has happened before when something similar has been tried, and the extent to which the context makes this a feasible solution. Without the expectation that each experiment should have a strong rationale based on existing evidence and experience, and a commitment (accountability) to learn from the experiment, organizations can get into a cycle of learning about solutions that already have compelling evidence (for or against). This re-learning of existing information wastes precious time, and poses particular challenges when staff are competing for scarce resources.

Re-learning of existing information wastes precious time.

The risk is greater for those implementing or experiencing the solution. Freedom to experiment implies freedom to fail. It is important to consider: What is at stake when experiments fail? The idea or practice of experimentation can get people's hopes up, waste time and energy, and diminish social capital. When experimenting in certain areas, such as public policy, it can be hard to go back on a position or unwind legislation once it has passed. It is also important to consider: Who is taking the risk in experimenting? For example, when a foundation funds community organizations to test out different strategies, the risk sits heavily with the implementing organizations and the communities experiencing the proposed solution. If the strategy does not work out, implementing organizations will not be able to show other funders a "track record of success" and therefore may be less likely to secure future funding. The strategy being tested may also have unintended negative impacts on the community in which the work takes place, and result in a breakdown of trust between the community and the implementing organization. Meanwhile, foundation staff are likely to experience less risk as they can often write the strategy off as an unsuccessful experiment with little long-term consequence for the foundation itself.

To help address these three potential unintended consequences, it is important to be intentional about experimenting. In reflecting on their experiences, EL practitioners identified five strategies that support strong experiments: 1) cultivating shared line of sight, 2) bounding the solution space, 3) identifying meaningful questions and hypotheses, 4) bringing diverse perspectives to the table and holding expertise in equal measure, and 5) returning learning to the system. In the next section, we discuss each of these strategies in greater detail.

FIVE STRATEGIES THAT SUPPORT EXPERIMENTATION

- Cultivating a Shared Line of Sight
- Defining Meaningful Questions and Hypotheses
- Returning Learning to the System
- Bounding the Solution Space
- Bringing Diverse Perspectives to the Table and Holding Expertise in Equal Measure

STRATEGY 1: Cultivating a shared line of sight

Freedom to experiment aims to test the impact of different strategies or tactics toward a shared goal. As noted in its definition, freedom to experiment is rooted in the ability to distinguish between the "what" (the goals or intended outcomes) and the "how" (the specific strategy or path to get to those goals). By distinguishing between these two concepts, actors can choose a variety of "hows" to get to the "what."

However, to maximize freedom to experiment, it is important to have a shared vision of what success would look like. It is important to foster alignment between the "what" and the "how" through a shared line of sight, another EL principle that means a clear vision from current decisions and actions to the ultimate desired outcome. When freedom to experiment is high, but line of sight is low, it can be easier for experiments to veer off in several different directions that are not aligned with the intended outcome.

STRATEGY 2: Bounding the solution space

The next question that arises is: with how much detail and clarity do we need to define "the what" and "the how?" This will depend heavily on context.

As noted previously, experiments are not without potential negative consequences. While many experiments may be small and very time-bound ("What will it take to make the most use of this next gathering?"), experiments of greater scale or stakes may require more clearly defining (or "bounding") aspects of the "what" and the "how." Experiments can be bound along many dimensions, for example, by a problem or issue area, a goal or intended outcome, a function, a geographic location, a strategic direction, or certain aspects of implementation.

In some cases, it may be useful to bound an experiment around some aspects of the "how," such as bounding based on similar types of solutions. Examples might include experimenting with how to effectively implement a promising practice (e.g., how to combine parent and child interventions to disrupt the cycle of poverty) or improve the effectiveness of an evidence-based process (e.g., screening individuals for disease; administering vaccines). Likewise, experimentation could be bound within a set of values; for example, experimenting with ways of working that are community-owned or experimenting with how to put equitable evaluation principles into practice. When defining the how, it is important to do so with intention, especially in funder/grantee relationships. Implementers and funders should have a shared understanding of why specific solutions have been prioritized (or co-created, where possible). Implementers have a strong understanding of what is likely to be feasible and impactful in their contexts, which should inform implementation priorities and the experimentation processes.

Another way to bound experiments is to bring together organizations with similar functions; for example, teachers unions, funders, or home health teams. As illustrated in the examples at the beginning of the chapter, groups with similar membership are more likely to have shared experiences and contexts, which enhances their potential to learn from each other. Another way to cultivate alignment is bounding within a geographic location, as has been emphasized with place-based initiatives which bring together diverse community stakeholders to work across systems, identify new ways to support opportunity, and advance equity in a defined geographic area (Urban Institute, n.d.).

Without boundaries, diverse experiments working to pull different levers across a giant system may be too diffuse to foster change or support learning. One practitioner described the work of a diverse coalition with a very broad line of sight: a high-level goal with numerous potential drivers/levers. Different organizations addressed the issue in different ways. The experimentation resulted in a series of case studies, each describing the results of a different systemic strategy. Unfortunately, this approach did not support the group in reflecting on the relative value of the strategies or allow them to identify a coherent way to move the work forward. Moreover, it was difficult to apply learning from one case to other circumstances, given the unique scope of each partner. In this case, the practitioner felt that the partners may have benefited from a more bounded learning question, for example, around a shared strategic goal, such as: What does it take to engage with the communities and understand their needs? In this way, the actors might have been better able to identify a shared "design space" that fostered greater learning.

Without boundaries, diverse experiments working to pull different levers across a giant system may be too diffuse to foster change or support learning.

What does it take to engage with the communities and understand their needs?

This example illustrates two additional considerations. First, think about the time frame or time horizon to support freedom to experiment and ensure the return of learning to the system. With too long of a time frame, there may be a risk of losing institutional memory along the way. It might be useful to break down large strategies into manageable subunits, both in terms of scope and duration. Second, think about the number of actors/participants involved in different, concurrent lines of experimentation. It is important to consider actors' capacity to meaningfully engage with others to return learning to the system.

Nancy Pole

In her example, Nancy Pole described the power of a bounded solution space. She was working with a funder network to support experimentation in two areas: philanthropic practice and policy influence and engagement. The network used a self-study process to co-define a set of principles for the philanthropic practice area, engaging each of member organizations around the question of their inequality footprint. Because there was alignment on the principles, the group was able to more easily develop hypotheses and experimental strategies related to the question of what it would take to a) facilitate uptake of the practices among those in the network, and b) to engage with foundation partners (outside the network) to adopt the practices. For the policy influence and engagement area, Nancy described challenges in the group conceptualizing its line of sight because players have been bringing different sets of assumptions to the table. However, careful work to make these different assumptions more explicit — for example, beliefs about whether foundations should engage in direct advocacy on social and economic justice issues — has helped to bound this space for experimentation.

Balance is critical. While an overly diffuse issue area, problem statement, or question can make change or learning difficult, bounding it too tightly limits freedom to experiment to a focus on specific tactics or ways of implementing (which, depending on the context, may be exactly what is needed or may be too narrow and constrictive).

STRATEGY 3: Defining meaningful questions and hypotheses.

Starting with a set of useful and meaningful questions can support groups in their freedom to experiment (Cohen, Morrison, and Price, 2020). In crafting questions and testing hypotheses,[2] practitioners identified the following three observations.

First, consider that experiments are unlikely to reveal a singular path forward. It is unlikely that any experiment or set of experiments will provide a definitive answer; rather, experimentation can provide insight about what is more or less feasible or impactful in a certain context at a given moment. Moreover, there are likely to be many "right answers" or promising approaches that emerge through experimentation. Regardless of the outcome, actors will still have to make a choice about how to move forward. Consider your intention in experimenting. Questions such as "should I pursue strategy X or strategy Y?" can be challenging, especially if they both show promise. Getting clear on your strategic goals — for example, what levers you are looking to understand or what you are making a decision between — can help in crafting questions.

> There are likely to be many "right answers" or promising approaches that emerge through experimentation.

Second, start from what is already known. For many areas, there is a lot of existing evidence. Before finalizing your questions, review previous work (both inside and outside of your organization) to understand what is already known and what remains less clear. One practitioner gave an example of the question, "Are local coalitions an effective leverage point to support policy change?" Looking at the literature, there is a lot known on this topic; specifically, that local coalitions can be extremely effective depending on the circumstances and that there are known characteristics of effective coalition work. Therefore, a question that builds on what is known and supports actionability might be framed as: What will it take to make local coalitions focused on Issue Y successful in our context?

> What will it take to make local coalitions focused on Issue Y successful in our context?

Third, consider issues that impact decision-making, such as feasibility. Evidence alone is rarely, if ever, the only contributing factor to a decision. The choice of what pathway to pursue might be rooted in a broad array of factors, such as organizational values, what is politically viable for a given place or time, available resources (public or private) to support a given solution, public willingness to engage with a given solution, or an organization's skills/ability to carry out a particular solution (Lomas, Culyer, McCutcheon, McAuley, and Law, 2005; World Health Organization, 2021).

[2] For more on developing and using hypotheses in Emergent Learning practices, see https://emergentlearning.org/practices/.

Just because an experiment produces positive results does not mean that the strategy will be adopted. In crafting questions, it can be useful to explicate both the individual and organizational value system and worldview being employed. For example, is an experiment being conducted with a food access or food justice point of view? One practitioner gave an example of experimentation they did related to how to pay for primary care differently (outside of a free-for-service model). Despite positive findings, the organization determined that national-level constraints prevented the conditions for scale. This points to the value in considering not only impact as a part of experiments, but also context: What will it take for this idea to be adopted in our context? It may be useful to identify and consider issues of feasibility — especially large, blocking barriers — before making significant investments in experimentation.

Just because an experiment produces positive results does not mean that the strategy will be adopted.

What will it take for this idea to be adopted in our context?

In developing hypotheses, practitioners noted the importance of holding space for participants to put forward various, even contradictory, hypotheses. The greater the ability of a system to hold and test competing hypotheses, the greater its ability to adapt quickly. In moving from hypotheses to experimentation, it may be useful to employ a review of the literature, to help prune or shape hypotheses so they are additive. In the same way, consider issues of feasibility, so that questions and experiments can support actionability.

Emergent Learning Tables[3] can help address the three considerations described in this strategy: supporting multi-path thinking, starting from what is known, and considering feasibility. When revisiting EL Tables (after experimentation), practitioners can compare experiences and refine hypotheses based on results, so that the learning builds on previous work.

STRATEGY 4: Bringing diverse perspectives to the table and holding expertise in equal measure

Two other EL principles — inviting diverse voices to the table and holding expertise in equal measure — help to maximize freedom to experiment by helping groups build a broader and deeper understanding of an issue and surface innovative ideas. Different ideas about "the how" may result from a variety of individual or organizational factors. For example, differences in previous experiences, contexts, assumptions, conceptualizations or perceptions of the biggest drivers of the problem, leverage points, or power in the system will all lead to different potential pathways to achieving the intended goals.

It is useful for practitioners to consider previous knowledge from a variety of perspectives, including those of academic research, applied data efforts, and community wisdom.

3 For more on EL Tables and other Emergent Learning practices, see https://emergentlearning.org/practices/.

Different sources have knowledge about a piece of the problem or a piece of the solution. Communities are often the most knowledgeable about their lives and experiences; however, other actors and organizations can also bring a wealth of experience and knowledge about solutions, especially in terms of rigorous evidence of what does or does not work in various contexts. In bringing evidence together, practitioners can craft useful and actionable experiments.

STRATEGY 5: Returning learning to the system

As described above, a key to maximizing freedom to experiment is creating opportunities to make sure the experimentation is moving the work forward. As noted in its definition, a core expectation of freedom to experiment is that actors will assess and learn from the results of the experiment; thus, there is accountability for using the information gained to inform future action. And often this includes reaching beyond their own experiments; deliberately setting the stage for actors to learn from each other's work and experiments. Relatedly, experiments may outlive the people who created them, for example, due to staff turnover, which requires good documentation and communication about the intention of an experiment during transitions. As noted by Darling, Guber, Smith, and Stiles (2016), "The contract involves both freedom and accountability — the freedom to choose one's own hypothesis, but also, importantly, the accountability to rigorously test and refine it."

> The contract involves both freedom and accountability — the freedom to choose one's own hypothesis, but also, importantly, the accountability to rigorously test and refine it.

Practitioners emphasized the importance of creating mechanisms to communicate what they are testing and what they are learning (avoiding siloed work); this can happen through both informal, routine mechanisms (an opportunity for peer-to-peer conversation about "hey, I tried this…") and opportunities for more rigorous reflection. In developing mechanisms for sharing, it may be valuable to consider how to steward learning in ways that promote deep understanding, for example, by coming back to shared goals, explicating contextual factors, and considering what aspects of the learning may be most relevant for others.

One piece that is often missing when returning learning to the system[4] is an explicit consideration of the context in which results were achieved; and reflection on the extent of alignment between the current context and context(s) in which the solution has been previously tested (Brownson, Shelton, Geng, and Glasgow, 2022). Consider whether you are over-learning (over-generalizing), under-learning (ignoring context), or just-right learning.

[4] For more on returning learning to the system, see Chapter 9.

A familiar example from Fourth Quadrant Partners (Darling, Smith, and Guber, 2018) is how we learn to eat with silverware. At the first level of learning we are handed a fork and learn that it can help us put food in our mouth; we do not learn anything about when, why, or how to use a fork, or what we could use instead. At the next level, we create hypotheses that take context into account, which give us more options, for example, to use forks or spoons, or how to use a fork to eat different kinds of foods. Finally, the highest level of learning represents understanding how silverware works, what the set of options are, and why a diner would choose one set over another.

A related challenge is when to consider an experiment a failure of theory (the solution is unlikely to produce the desired impact) versus a failure of implementation (the solution was not fully implemented or implemented in the wrong way to produce the desired impact). For example, an irrigation project can fail either because it does not actually produce better water support for the farmers (failure of implementation) or because water was not a key constraint to farmer output in the first place (failure of theory) (Pritchett, Samji, and Hammer, 2013). A cogent assessment of the level of implementation is a critical part of understanding the effectiveness of a strategy.

What gets in the way of freedom to experiment?

There are a number of obstacles that can hinder our ability to maximize the freedom to experiment.

Top down choice of solutions. The first barrier is a hierarchical "command and control" structure that reinforces power differentials and siloed work. Within some organizations, leadership aims to maintain tight control and dictate specific instructions to be executed. This is rooted in the notion that one person has all the expertise or the right answers. Such dynamics can also manifest between organizations, for example, in funder-grantee relationships or within large governmental/bureaucratic systems, where those "on the ground" are not given the leeway to experiment or execute in the ways they deem best. This can be ameliorated by seeking ways to provide agency for actors at all levels and creating diverse structures to co-create.

Belief in a "right" solution. A related challenge is single-solution thinking (i.e., there is one right way to achieve an outcome). Single-solution thinking can be driven by individuals or organizations, which may stem from risk aversion or from the belief that there is a right answer that can be discovered and implemented. This can lead to a lack of willingness to try something different, or to doing the same thing, but framing it differently (not making any substantive changes), both of which stifle innovation. Belief in a single solution can be challenged by adopting a systems frame and embracing the complex factors and dynamics that hold a problem in place.

Perfectionism and risk avoidance. A related challenge is perfectionism: a culture in which mistakes are perceived as personal, there are unrealistic expectations, and there is an extreme focus on often unattainable results. In her case study, Alison Grubbs (2020) notes the structural challenges her organization faced in maximizing freedom to experiment, including the timeline required to plan and execute grant processes (which raised the stakes of the experiment) and the organization's desire to minimize risk (which translated into a long list of requirements that restricted their ability to experiment). It is important to reflect on the extent to which organizational structures promote or facilitate individuals' willingness to engage in experimentation.

Competitive, versus collaborative, orientation. Freedom to experiment (with others) requires actors to collaborate and share ideas. This is hampered when individuals or organizations feel like they need to prove something or out-do one another to succeed, for example, to win funding or to build their career. Creating a shared vision of success helps to overcome this dynamic. As madeleine describes in her work, she was able to cultivate a group sentiment that "if one is shining, then all are shining." But there is also the reality that needs to be acknowledged of existing dynamics around limited funding, competition for resources, and the business models which encourage organizations and firms to differentiate themselves from one another and hoard intellectual property.

BARRIERS TO MAXIMIZING FREEDOM TO EXPERIMENT

- Hierarchical structures that reinforce power differentials and/or siloed work.
- Notion that one person has all the expertise.
- Single solution thinking.
- Perfectionism and avoidance of risk.
- Competitive dynamics.

How do these barriers show up?

Organizations with these traits may focus on executing well-defined protocols and replicating existing strategies even in novel situations without considering the unique context or factors that made the solution work. Some settings may emphasize rigidity for a reason — for example, when there are legal or safety concerns. Likewise, some focus on fidelity may be warranted — for example in implementing evidence-based practices. As noted by Darling and Smith (2011), a common approach to correcting failures is to build institutional solutions to problems, such as process-heavy decision-making and annual planning processes. While the resulting procedures and checklists might reduce the opportunity to fail, they can also reduce the opportunity to learn. Consider how to make sure your procedures, checklists, and protocols (which often represent previous forms of evidence about how to achieve success) are fit-for-purpose and do not get in the way of innovation and freedom to experiment. One idea offered by Marilyn Darling is to create a protected space that is intentionally not bound by the structures of the larger organization.

Evaluation and learning work in organizations with these traits may focus on accountability, demonstrating results, or proving success. When there is an assumption that there is only one right solution or that fidelity to the model is the only thing that matters, freedom to experiment is greatly diminished. It is valuable to consider how to adhere to evidence-based principles, while still seeking to adapt and learn from practices in context. For example, developing and testing strategies that simultaneously consider evidence-based crime prevention strategies, community members' lived experiences and preferences, community resources and assets, and available resources. As long as an organization can resist believing that their current solutions are the "best" ones that will ever be found, freedom to experiment can help move us forward; even if the focus is on improved efficiency, implementation, or tactics. It is possible to simultaneously consider existing evidence and make disciplined choices about how to experiment in order to take our knowledge to the next level.

> As long as an organization can resist believing that their current solutions are the "best" ones that will ever be found, freedom to experiment can help move us forward.

QUESTIONS TO HELP ASSESS YOUR ORGANIZATION'S WILLINGNESS TO EMBRACE FREEDOM TO EXPERIMENT

Openness to new ideas: In this unit, are people interested in better ways of doing things?

Experimentation: In this unit, do we experiment frequently with new ways of thinking?

Appreciation of differences: Will an opinion that is not consistent with what most people in this unit believe be valued?

Adapted from Garvin, Edmonson, and Francesca (2008).

Conclusion

This chapter provided some initial thoughts on the following questions:

- What is freedom to experiment?
- What does freedom to experiment make possible?
- What are potential unintended consequences of freedom to experiment?
- What strategies support experimentation?
- What gets in the way of freedom to experiment?

In unpacking this principle, we attempted to surface potential tensions points. In reflecting, here are some additional questions that remain top of mind:

- What are the conditions in which freedom to experiment produces maximum impact?
- How can freedom to experiment support systemic learning across and between actors/organizations/parts of the system?
- How does the external context/environment support or inhibit actors' ability to experiment?
- By experimenting, you are likely to narrow in on a path of action. If/how do you continue to experiment as you move down that path?

Emergent Learning itself embodies the principle of maximizing freedom to experiment. The practice of EL is not about using the tools exactly as prescribed. EL practitioners walk a process of discovery, which allows for responsiveness and adaptation, and — as this guide illustrates — work diligently to share what they are learning back to the system. We are excited to hear your stories and reflections as we continue to experiment and learn together as a community!

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CHAPTER 5

Keeping Work at the Center

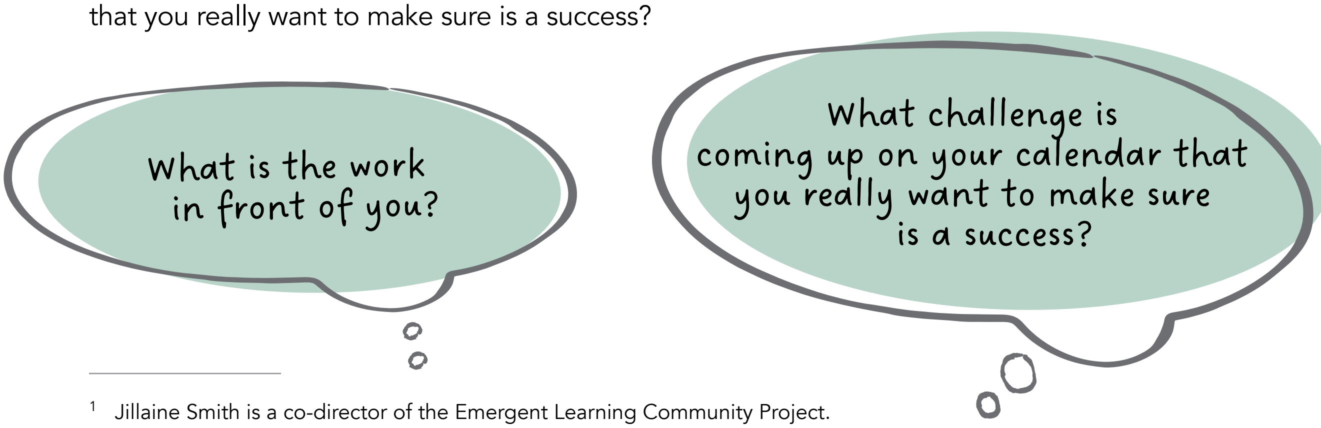
By Jillaine Smith[1] and Leslie Foster, MPA (2017)[2]

Adult learning theory reminds us that we learn best about the things that matter most to us *right now*. This was true for me (Jillaine) even as a child. The youngest of four, I grew up listening to my siblings' favorite music of the mid 1960s — the Beatles, Rolling Stones, Credence Clearwater and more. When I turned ten and my mother suggested that I learn how to play the piano, I was thrilled at the idea of learning how to play my favorite songs. I eagerly took a music book of Beatles tunes to my first lesson. My piano teacher, however, barely acknowledged the book, set it aside, and placed a book of beginner piano music meant for young children in front of me. My enthusiasm waned. I was intensely bored by the exercises the teacher made me practice from that book. I stuck it out for a while, but ultimately gave up the lessons (and later even the piano) because — as I know now — those lessons were not centered on what I was most interested in. I often wonder: what if that piano teacher had recognized what was important to me and incorporated some Beatles or other rock music into my lessons?

What is keeping work at the center?

In the social sector, we often hear leaders say "we want to be a learning organization," but without clarifying for themselves or others what would be different or better if they were. Staff may be hired to lead learning, expected to deliver "lessons learned" or an organization-wide Learning Agenda or framework, but often without strong connections to or buy-in from the programmatic work of the organization.

Many years ago, I (Jillaine) was teaching Emergent Learning practices to a group of evaluation consultants. They wanted to know — as many early practitioners of Emergent Learning often do — when should we use which EL practice? I responded with other questions: What is the work in front of you? What challenge is coming up on your calendar that you really want to make sure is a success?



1 Jillaine Smith is a co-director of the Emergent Learning Community Project.

2 The year a practitioner joined the EL Community.

What work have you done recently, still relevant to future work, that would benefit from reflection?

What work have you done recently, still relevant to future work, that would benefit from reflection? In other words, what is the work at the *center* of your interest; then choose your EL practice based *on that*.

The principle of **keeping work at the center** reminds us to keep organizational learning focused on what matters to and is useful for the people engaged in the learning practice. This principle invokes both a why and a how for learning — why learning makes a difference (if you aren't learning about your work, why invest time in learning?), and a way to ensure that a learning practice realizes its potential (if you don't tap into what interests people, they won't engage). In fact, Yen Chau observes that when she talks about the principle, she describes it as "keeping the 'why' at the center."

The goal of any Emergent Learning-related activity is to improve the results of our actual work and our ability to achieve results in the future. A useful analogy might be to contrast writing a daily journal with writing a life's memoir. A daily journal keeps work at the center in that sorting one's thoughts about the issues of today is preparation for a better tomorrow, whereas writing the memoir of one's life is reflection for the sake of posterity.

KEEPING WORK AT THE CENTER

Keeping learning focused on what matters to and is useful for the people engaged in the learning practice, so that participants see learning as relevant and worth their investment of time.

What does keeping work at the center make possible?

In the midst of a rush of deadlines, it can be hard to make the case to stop and reflect and learn from what contributed to or impeded our results. But when such learning is disconnected from the work at hand, learning can feel like an imposition.

When learning is disconnected from the work at hand, learning can feel like an imposition.

When learning is done in service of advancing and strengthening specific work goals, then participants see the relevance of learning, experience the value of their investment of time, and want to do more of it. This is the heart of this principle — focusing our learning reflections on the work at hand. It also means that we have an immediate customer for what we are learning — we can close the loop by applying what we've learned today to improving results tomorrow, which validates the lesson and makes it accessible.

madeleine kennedy-macfoy's (2021) introduction to Emergent Learning illustrates this. In her work for Education International, a global federation of teachers' trade unions, madeleine partnered with Gender at Work to support the efforts of education unions in a number of African countries to eradicate gender-based violence in and around schools. "While Education International is all about education," madeleine observed, "our own learning was not being integrated into what we do or how we do it." When she first experienced EL being used by Gender at Work, she recognized right away that something different was at play.

"I observed a clarity in their thinking, in how they asked questions of each other, all learning conversations intentionally focused on the work in front of them," madeleine noted. "While what we worked on was familiar (violence in and around schools), Gender at Work's approach to learning conversations elicited open and honest responses. I had not seen much of this in my work with Education International," madeleine admitted.

This experience of observing Emergent Learning at work with Gender at Work led her to bring the practice to her work at Education International.

In late 2021, madeleine was coordinating Education International's fourth world women's conference — the third time for her, but the first time planning for an *all virtual* conference, and this time sharing responsibility across a team, also virtually. With her team, madeleine conducted Before and After Action Reviews (BARs and AARs)[3] on a regular basis, strengthening the group's shared line of sight towards delivering a high quality conference virtually. "We did this for each area — content, technology, finance, communications," madeleine described. "For example, we explored what it would take to identify topics and themes that would attract both good and compelling speakers as well as keep online attendance high during each day of the conference." They used EL in other areas of the work before them — how to develop the conference app, how to implement conference registration, how to attract high level speakers, and more.

[3] For more on BAR-AARs and other Emergent Learning Practices, see https://emergentlearning.org/practices/.

The impact on her team of this intentional focus on shared learning around the work in front of them was stunning. “Using BARs allowed me to open things up in ways that we were not used to; previously, the bulk of the responsibility for making sure planning proceeded and to ensure a successful conference, had fallen only on me,” madeleine explained. “But answering the BAR questions on a regular basis led to a level of openness and working together as a team that we had never experienced; each person’s contribution was visible not only to themselves but to others as well.”

It also changed madeleine’s approach to her own work. “EL gave me an opportunity to step into the teamwork with the intention of being a positive force, creating trust and positivity; people looked forward to those meetings; we had fun and experienced the progress we were making. The conference shifted from being madeleine’s conference to being everyone’s conference.”

Tragically, four days prior to the conference, madeleine’s mother passed away, and she had to turn her attention away from the conference to attend to the needs of her family and herself. Under earlier circumstances, this would have been a major interruption to the conference. But because of all those BARs focused on the center of the team’s work, madeleine’s colleagues were able to move forward without her. “Previously, I held most of the work. People expected me to. This time, we all held hands together, and when I let go, I could step out of the space, other hands met and they continued.”

Everything was so clear, from the beginning; everyone knew what they had to do and what others were doing. We all knew where we were going together.

Centering her practice of EL on the work of the group enabled madeleine to re-conceptualize her own role and obtain buy-in from others for the planning, implementation and ultimate success of the conference. “Everything was so clear, from the beginning; everyone knew what they had to do and what others were doing. We all knew where we were going together.” Despite madeleine’s absence, “the rest of the team was fine. The conference went so smoothly, attendees did not even realize I wasn’t there.” All this was possible, madeleine reflected, because of the time invested in seeking clarity on an ongoing basis.

And madeleine noticed something else about the practice: “In addition to achieving shared clarity about the content of the work, Emergent Learning invited me to think deeply and carefully about *how* I am working with other people; *how* I enter the room each time; and *how* to engage others to join me on this journey. It was about me as a whole person — how I think, feel and act in doing my work. Emergent Learning is a way of *being* in the work. Same conference, same colleagues. Different me.”

madeleine and her team could have “done learning” around teamwork and interpersonal dynamics. Instead, out of necessity, they learned in real time, around an immediate work challenge so that the benefits were tangible and immediate. No need to find opportunities to take learning back to their day jobs. It was already there!

How do we stray away from that focus?

Many organizations believe they need to start their "learning work" with an organization-wide Learning Agenda — sort of like a strategic plan for learning. But starting there can lead to asking big, abstract questions, divorced from the actual work in front of people. When people are asked to learn about an abstract question (e.g., how to "increase collaboration"), or something that matters more to someone else (e.g., a question raised by a funder or other external stakeholder), learning starts to feel like an obligation; it is taking time away from "real" work and feels more like "learning for the sake of learning." This can often make learning one-way and extractive, instead of making it practical and relevant to one's work.[4]

Another common mistake we in the social sector make is forgetting that the frameworks we embrace have a "so that" behind them — that they represent our best thinking (our hypothesis) about how to achieve a goal — and focus instead on learning how to implement those *frameworks*, not on how using the frameworks actually improve the *results* we care about. We risk losing sight of the *results* we seek because we are over-focused on the *method* to get there.

> We risk losing sight of the *results* we seek because we are over-focused on the *method* to get there.

For example, madeleine described a previous experience where an organization had decided that "intersectionality" needed to be at the center of their work. "An external consultant did a great job of contextualizing intersectionality for us, but even though they provided concrete examples from our field, many colleagues told me it still felt like something *out there* and not part of our work," madeleine explained. "If I could turn the clock back, knowing what I know now about Emergent Learning, I would have taken a concrete piece of our work and used BARs and AARs to explore what it would take to plan and implement *that work* through an intersectional lens."

Before taking on the learning officer role at the Robert Wood Johnson Foundation, Tracy Costigan (2018) attended day-long staff retreats that were designed to support learning about topics that mattered to the Foundation's strategic approach (e.g., What is narrative change?). "At the end of the day, staff were energized and excited from the ideas that emerged," she noted, "but they always walked away wondering 'so what?' and expecting (rightly so) that nothing would change in the work as a result of the day. It was just learning for the sake of it."

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4 Not all attempts to learn at an organization-wide level are wrong. However, starting with more immediate work challenges and program- or project-specific goals builds an appetite for learning among those doing the work; what's being learned on the ground can then be rolled up to explore larger institutional questions.

What does it look like when keeping work at the center is present or absent?

Present	Absent
✓ A group's work goals drive its learning strategy. ✓ Success and the value of learning-related efforts are measured against progress related to the work itself. ✓ Processes or approaches, including learning, do not become ends in and of themselves.	✗ The focus shifts from the group's work goals to advocating for, and learning about, favored processes or approaches. ✗ Success is measured against fidelity to that approach, rather than against progress on the work goal. ✗ Learning becomes detached from the actual work of a group, reducing engagement.

What does this principle look like in practice?

Whether we are keeping our work at the center of learning or not can manifest itself in a number of ways. Here is what we have observed:

When a group's work goals drive its learning strategy, the value of learning-related efforts are measured against progress related to the work itself. Processes or frameworks, including learning, are held as hypotheses about how to achieve better results; they do not become ends in and of themselves. It's not about how many learning sessions are scheduled in a given period of time or how many staff attend. Teams start noticing and calling for real, immediate opportunities to learn and dive into those opportunities, because they experience the impact of their learning on their actual results.

When Tracy Costigan was hired into the new role of Director of Learning at the Robert Wood Johnson Foundation in 2017, she experienced what we described above: the first task assigned to her was to develop and steward an organization-wide Learning Agenda. She rightly realized that an abstract, top-down Learning Agenda would not likely obtain buy-in from pertinent staff to be implementable. As Tracy explored with leadership what they sought to accomplish through an organization-wide Learning Agenda, it quickly became clear that the priority was not on professional development and staff training, but about strengthening both the thinking and results of the foundation's strategies and programs. Tracy turned to the strategy papers that were being generated as part of an organization-wide strategy refresh. Emerging from these papers was a set of cross-cutting themes such as narrative change, power building, and data work. Tracy's initial Learning Agenda sought to focus on these themes.

"But even then, what did we mean by 'community power building'? Our staff had different levels of understanding of this topic and approach to create social change. Leadership asked that we provide our staff with a 101-level learning series." The foundation brought in external experts — powerful speakers able to convey what power building was and why it mattered. "The speakers were great, very inspiring," noted Tracy. "But when people returned to their desks, to their work, it was not at all clear how to translate that inspiration into the work in front of them." In other words, staff's own work was not at the center of these learning sessions.

How does this strategy support organizations to drive change?

As Tracy incorporated EL principles into her own work, program learning retreats and gatherings became more focused on staff's actual work, often around framing questions such as: "What will it take for us to shift mindsets as part of our work to achieve health equity?" Participants focused on what they were learning about how their own team approached this question. From these reflections emerged priorities for the foundation as a whole, identifying those key mindsets that needed to be shifted and suggesting a variety of ways to get there. This also helped staff track progress towards their mindset-shifting goals. "Now we have a much clearer sense of which mindsets and systemic barriers stand in the way of health."

What will it take for us to shift mindsets as part of our work to achieve health equity?

Tracy concluded that when such reflection sessions are centered on participants' actual work, "a group may no longer label these conversations as 'learning,' which implies something separate. Rather, they are engaging in iterative reflective conversations to generate important insights, and this is an important process or piece of the work at the center.... it's just how the work happens, but with more rigor and discipline."

Robin McKinney (2015), co-founder and CEO of CASH Campaign of Maryland, brought Emergent Learning to the center of the organization's yearly site visits to their partner organizations, which entailed visiting 17 sites in over six weeks. Prior to this, the annual site visits were perceived by both staff and the sites as a "check-the-box" requirement of the funder — the US Internal Revenue Service — to collect basic quantitative data (number of tax returns filed, number of volunteers). "We would leave these site visits wondering, what did we really *learn* about them? What do they need to be successful and how can we best support them?"

"An initial Before Action Review prior to the series of visits helped our team ground itself and get on the same page about what *we* wanted from the visits and how we could better use these visits to strengthen the services we provide the sites."

BARs and AARs conducted before and after each visit led to staff paying closer attention to the context inside of which their partners worked, including the proximity to resources (or lack thereof). “If we were hungry between visits and couldn’t find any service, is this what the locals experienced? We hadn’t even thought of that,” Robin admitted. “We had said we wanted our services to be customized to local context, but engaging in these BARs and AARs opened our eyes to what that would *really* mean. If we had used our normal checklist (toner, clips, paper, etc.), we would not have really understood the real challenges of a particular group.”

The iterative nature of doing BARs and AARs also led staff to clarify the kind of conversations that staff aspired to have with sites, pushing partner conversations to a new level. Robin reported that several of the people they met recognized that something was different, too: “They would say how energized the site visit made them, how our conversations were so helpful and productive. Who leaves a required site visit feeling like *that*?”

> They would say how energized the site visit made them... Who leaves a site visit feeling like *that*?

During the following year, Robin’s team sent the sites the AAR questions in advance, along with three years of each site organization’s trend data. “Sites came to conversations wildly more prepared. We stopped relying on the handout and found ourselves just naturally asking the questions: What do we already know here? What was successful? We just start thinking that way.”

This intentional work-centered learning practice had additional unexpected benefits for Robin and her team. Keeping the work at the center has built such an appetite among staff for strengthening their learning muscle that EL is now being applied elsewhere in the organization. Robin noted that a frequent reflection in staff meetings is often “We should have done a BAR!”

What do we already know here?

What was successful?

More than that, keeping work at the center has also strengthened staff’s strategic thinking muscle. “BAR/AAR questions are just simple questions, but the way they are set up and framed takes us to a different depth of thinking.” While Robin admitted that many external factors impact the volume of their results, “BAR/AARs increased and strengthened the quality of our thinking and planning.”

Watch a video interview (Smith & McKinney, 2021) with Robin for more details about their use of Emergent Learning, keeping their work at the center.

PRACTICE

How Emergent Learning practices support this principle

The practices of Emergent Learning[5] work together to help teams keep their work at the center of any learning activities:

Framing Questions turn a work goal or challenge into a "What will it take…?" question that invites everyone involved to bring their best thinking to the table and learn together. For example, the site visits conducted by CASH Campaign of Maryland could have focused on what it would take to complete 17 site visits in six weeks; instead their framing question became "What will it take to use these required site visits to transform our relationships with and support for our partner organizations?"

Learning Agendas. Tracy Costigan of the Robert Wood Johnson Foundation shared that "One of our organization-wide learning questions is 'What will it take to increase community power to advance racial equity?' Focusing a Learning Agenda around this one question kept staff's actual work at the center of their learning practices." Tracy realized that this then led to a "layered Learning Agenda" with each layer having more specific questions for different audiences within the organization; each group had different questions about their piece of the work. For example:

How does this strategy support organizations to drive change?

> **Program staff**: How does the foundations' community power strategy support local, constituency-led organizations to drive change?
>
> **Leadership**: What are we learning about how increasing community power leads to long term outcomes of our theory of change (changes in mindset, policies, conditions)?
>
> **Board**: What will it take to understand and navigate those elements of the context that most directly contribute to or impede our ability to achieve our goals? What strategies lead to the greatest impact?

What strategies lead to the greatest impact?

[5] For more on Emergent Learning Practices, see https://emergentlearning.org/practices/

Action Hypotheses. Keeping work at the center helps people clarify the "so that" in their thinking about how to achieve a goal. It takes a favored approach such as "intersectionality" and articulates what it is about this approach that is going to make a difference to the work at hand. For example: *If* we incorporate into our program design the interconnected impact of race, class and gender, *then* we can better attract, retain, and make a difference with groups that are disproportionately affected.

Before and After Action Reviews are perhaps the easiest and fastest way to center a group's learning around its actual work as they help teams identify real, immediate opportunities (an upcoming conference, a set of site visits) to learn related to their actual workstream and conduct fit-for-purpose learning that produces visible, immediate results. As Tracy Costigan put it, "BARs/AARs keep the work at the center by bringing sharpened clarity to the work and generating meaningful insights to shape the next activity at hand."

KEEPING EVALUATION CLIENT'S WORK AT THE CENTER

Mathematica Policy Research

I (Leslie Foster) became a public policy researcher and program evaluator to help clients use evidence to learn, decide, and act. In my work at Mathematica Policy Research, clients are foundation and government staff who design policies and programs to improve health and health care. They hire researchers and evaluators to assess whether policies and programs are achieving their intended effects so that they can decide what activities to sustain, adapt, or study further, and act on their decisions. My work is impactful when it helps clients do these things.

I feel great dismay when clients and other audiences say that many evaluations are not impactful, even though the quality of methods is not in doubt. One of my Emergent Learning aspirations was to understand what it would take to make my work more impactful — that is, more relevant to my clients' desire to learn, decide, and do. I did not intend to pursue my aspiration by facilitating BARs and AARs with clients. I wanted to do it through written reports, oral presentations, and other deliverables that evaluation clients typically request.

For me, keeping work at the center of my EL practice means keeping the potential for *client learning* — my desired impact — at the center of my practice. When the principle is missing, clients might be satisfied with the quality of my evaluation work (believing that I appropriately selected and applied methods) but they won't approach it with real curiosity, take notes in the margin, or share it excitedly with a colleague or the field. When the principle is missing, the client will put my evaluation report on a shelf.

> For me, keeping work at the center of my EL practice means keeping the potential for client learning — my desired impact — at the center of my practice.

What does keeping client learning at the center look like in an evaluation report? I hope it looks like empathy for busy people with a lot of demands on their attention. In my case study for EL certification (Foster, 2017), I described using EL practices to transform evaluation reports into learning documents. For example, I suggest using framing questions as report titles to invite the client to discover an answer to a question they care about. I suggest stating the client's original hypothesis behind a program or policy to lend an explicit learning purpose to the report's findings and to invite the client to reject, accept, or refine the hypothesis as they read.

I also suggest writing recommendations that comprise a purpose and a way to get there, following what the *4QP Guide to Emergent Learning* (Darling, Smith, & Guber, 2018) says about linking outcomes to actions and providing a line of sight so that people can make their own good decisions.

More recently, I've begun involving our foundation clients — and when possible their grantee partners — in data analysis to heighten anticipation of, and interest in, a forthcoming deliverable. After my team and I have done a preliminary, thematic analysis of evaluation data, we share it in a group setting with the client so that they and any partners can grapple with it, bring insights and perhaps the lens of lived experience to the information we collected. By actively listening to my client and others engage with the data, I learn what surprises them, what associations the data may prompt, and what questions it raises. Not only is this real-time engagement a form of Emergent Learning as its designers intended it, but I can also use notes from the conversation to create a written deliverable that benefits from those upfront insights, making it more likely that the first draft will land well with the client. Bringing the voice of grantee partners to sensemaking sessions — rather than filtering that voice through the evaluation team — is a powerful way to put the client's and grantees' work at the center of evaluation, thus increasing the evaluation's relevance to those most invested in that work.

When evaluators fail to keep client learning at the center of their work, it may be their academic training that gets in the way. In writing a master's thesis or doctoral dissertation, future evaluators showcase *their* knowledge of a body of work and *their* ability to add to that knowledge. Later, if evaluators give clients dissertation-like reports, the client must translate what is written to meet their own learning needs. Producing evaluation deliverables that help clients learn, act, and do requires external evaluators to set their attachment to their own work aside. Emergent Learning is the perfect antidote to the ingrained academic tendency of evaluators to show *I can do it*! It calls upon us to center the needs and perspectives of clients so that they may learn.

Emergent Learning... calls upon us to center the needs and perspectives of clients so they may learn.


Leslie Foster

Conclusion

Learning for learning's sake, because it is educational more than practical, is not often a powerful motivator to change behavior. Learning for learning's sake is not wrong or wasteful — becoming more knowledgeable about a new topic expands the mind and makes life exciting. But when learning is meant to improve how we work so that we are more likely to achieve our goals, then the learning must be centered on the work at hand.

Emergent Learning practices and the questions they embed help teams maintain that focus. Becoming — and staying — engaged in new ways of learning and working are more effective when focused on something that taps into intrinsic motivation. When to-do lists pile up, what will help you and your team make the time for reflection? To start, take a look at your own work and use Emergent Learning around that — an important upcoming meeting, a recently completed grant cycle, or a strategic question your team is grappling with. Pick something short, reflect, and try again.

If we succeed in keeping work at the center of our approach to learning; if we can help people use learning to solve real problems or improve important results that matter to them, then we can create a natural advocacy for learning as a strategic priority.

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CHAPTER 6

Inviting Diverse Voices to the Table

By Janine Saunders, EdD (2020)[1]

If you want to go fast, go alone. If you want to go far, go together.

–African Proverb

Imagine that you are planning a dinner party for a large group of your friends from different parts of your life. You've invited your childhood best friend and your college roommate and your favorite professor from graduate school and others across your life. You choose the menu and send the invitations. You set the table and select the music. You think of the various things that your friends bring to your life and you imagine the rich conversations that will happen over dinner. You are, quite literally, inviting diverse voices to your table. And as each of your friends interacts with each other, without any orchestration, they are creating a whole that is greater than the sum of its parts — the definition of emergence. We will return to our dinner party analogy throughout this chapter as we consider why, when, and how to bring diverse voices to the table.

What is inviting diverse voices to the table?

> It is not just about getting better input; it is about respect and recognition for the people who are working together to help all of us go far.

In an Emergent Learning conversation, the more diverse the set of experiences and perspectives represented, the greater the potential for "robust" insights to be developed — insights that hold true across a variety of situations. Inviting the people who care about a question and who have an active role in addressing it to think together about what they've learned from their collective experience leads to a greater level of ownership for the hypotheses that get generated and agency for testing them out. **Inviting diverse voices** to the table means reaching beyond the usual folks that we may lean on to help us solve tough problems and considering who else may have knowledge and experience to contribute. As Sonia Caus Gleason (2018) sees it, "At one level, this idea of bringing diverse voices to the table isn't any different than bringing any voice to the table. When you care about someone, and you convey that, and you're ready to lean in and listen to someone, people sense that." At the same time, adds Sonia, "when there are voices that have been traditionally left out, you need to be more intentional about

[1] The year a practitioner joined the EL Community.

reaching out, creating a supportive context, and listening with care." It also means creating conditions that allow everyone to participate in the process of thinking, learning, and adapting together. It is not just about getting better input; it is about respect and recognition for the people who are working together to help all of us go far.

INVITING DIVERSE VOICES TO THE TABLE

Reaching beyond the usual folks that we may lean on to help us solve tough problems and considering who else may have knowledge and experience to contribute, and creating the conditions that allow everyone to participate.

What inviting diverse voices to the table makes possible

Ultimately, Emergent Learning is a set of principles and practices that help the whole ecosystem to think, learn, and evolve to solve complex problems. When we say "whole ecosystem," that is what we mean. The more diverse the perspectives and experiences that contribute to our understanding of a challenging issue, the more our collective creativity and innovation can be harnessed in addressing the problem or issue. A diverse group of people is more likely to offer a wider range of viewpoints and options, resulting in more informed and well-rounded decisions. Various perspectives may clash resulting in what my colleague Bea Solis referred to as "sandpaper moments" — those times when our ideas rub up against each other in a way that may feel rough but ultimately ends up polishing both surfaces. A diverse set of voices around the table also means that you, the host, have the opportunity to learn and expand your own ways of knowing. Diversity of opinion enriches everyone.

I believe that the benefits of diversity are many. In the field of Emergent Learning, diversity means that framing questions,[2] which create a focus for collective learning, are broad enough to capture a wide range of experiences. It means that hypotheses, which are necessarily rooted in evidence, are more complete because they draw from a wider range of data. As Marian Urquilla (2013) reminds us, "in the EL context, we have to remember that history is data." Using our EL practices, we use what has just happened as key sources of information to help plan what comes next.

> [Inviting] a diverse group of people is more likely to... result in more informed and well-rounded decisions.

[2] For more on Framing Questions and other EL Practices mentioned here, see https://emergentlearning.org/practices/.

With greater diversity on our teams, Before and After Action Reviews can enhance our ability to understand what caused a specific set of results from various perspectives, identify practices that encompass a broad definition of success, and dig into structural factors that may have caused the results. In summary, I believe that diverse voices can enhance all aspects of Emergent Learning, accelerating our results over time.

What does it look like when diverse voices are present or absent?

Present	Absent
✓ There are lots of stories to "rub together" to compare and contrast; to seek out patterns and explore surprising outliers. ✓ Counterexamples are welcomed. ✓ By lingering in inquiry mode, participants often find themselves asking new and more powerful questions. ✓ What looks like a barrier to one person may look like an opportunity from a different perspective.	✗ The amount of experience to draw from is limited and leads to hypotheses that are risk-averse and reinforce the status quo. ✗ The conversation may default to what other people who were not invited to the table should be doing.

When this principle is present, it creates some signals about the culture of the organization. It means that within the organization, there is a culture of slowing down. When diverse voices are present, the work may take longer. With a broader set of voices and experiences, there will be more information to consider. New patterns and surprising outliers may arise and it will take time to explore them completely. Novel opportunities to strengthen and reframe learning questions may present themselves.

A lack of diverse voices at the table could also result in a narrow set of hypotheses. As mentioned above, our hypotheses are based on evidence from the past. If we all share a similar past, we may default to ideas or ways of knowing that are comfortable or that reinforce the status quo. We may miss hypotheses to test because we have only considered one aspect of the problem and are lacking the experiences to understand other aspects. If folks bring forward differing sets of evidence, we can expect to engage in a more meaningful exchange of ideas.

A NOTE ABOUT "INVITING"

While much of this chapter will focus on diversity, I want to take a moment to consider the word Invite. An invitation is a request to someone to go somewhere or to do something. In this context, we are inviting a larger and more diverse group of people than we typically do to bring their ideas and ways of knowing to achieve aspirational social change goals. As you consider our dinner party analogy above, consider how it all starts with an invitation to participate in something. The same is true when inviting diverse voices to the table.

As you think about invitations, I want to lift up the importance of authenticity when issuing your invitation. Punita Thurman (2019), VP Program and Strategy at Skillman Foundation) describes what makes her suspect of an invitation is "if I don't have a relationship with the person who's inviting me. If I don't know you and your first outreach to me is to ask me to invest my time, and you don't really understand the value it will provide to me, but are more focused on what value I can provide to you, that is what makes me suspicious of the invitation."

"These things are so subtle. You can see it in how people talk to you," shared Ammara Ansari (2020), Director of Development and New Initiatives, Detroit Action. "It's clear when they're making an intentional effort. You can see when people are genuine versus when they aren't. It's in their body language, it's in their eye contact. And especially when it comes to funder and grantee relationships or even when we're talking about what it looks like to have partnership amongst different organizations."

It's clear when [people] are making an intentional effort. You can see when people are genuine versus when they aren't.

There are effective and respectful ways to invite diverse voices that are consistent with the spirit of the principle. One way to do this is to consider why you are seeking out diverse voices and communicate that to your invitee. Sonia Caus Gleason describes it as "having a genuine curiosity to be with people you are not usually around and hoping that they think about things differently than you do." Knowing that you are interested in learning from someone's experience and perspective is an excellent way to set the table. You may also consider who issues the invitation and if that may impact how your invitees show up in the space. Another way is to show respect for folks' time. Sharing thoughts, ideas, and insights is labor. Too often, I am in spaces where "professionals" are paid for their time while "community experts" are expected to volunteer. Holding expertise in equal measure also means holding the value of time in equal measure. It is important to think deeply about how people are invited to the table, not just who has been invited.

Diverse voices in ourselves and our work


Janine Saunders

I cannot talk about how this principle first manifested in my work without talking about how it is present in my life. I *am* a diverse voice, dear reader! Your author is a queer Black woman and a lifelong Californian. Thus, it is hard for me to reach back to a time when I was not striving to bring diverse voices to the tables I occupy. I believe deeply that diverse voices and opinions enhance all aspects of my work and my life.

However, an example of how I have recently used this principle in my work comes from The California Endowment's (TCE) strategy development and community engagement process. The Endowment's 10-year Building Healthy Communities (BHC) (The California Endowment, 2020) initiative supported grassroots organizations and partners in 14 sites statewide, identified as some of the most marginalized communities throughout California, as they built power to transform systems of injustice. BHC was a profound journey alongside our partners, filled with many community-led victories. When we, TCE staff, were ready to design our strategy for the next 10 years, we knew that beginning with diverse community voices was key to our success. We began to design a multi-step community engagement process that would inform strategy development while engaging the broadest possible set of stakeholders.

We started with a survey to test our initial strategic direction and heard from over 1,000 of our community partners. Based on what we heard from our partners about that initial direction, we then designed the broad strokes of our new strategic framework. With this framework in hand, we next conducted over 150 individual interviews with our grantee partners. The interviews helped us to create a human-centered design process that brought our grantee partners together in regional groups to discuss what resonated in the strategic framework and to offer their insights on how to improve the frameworks. Finally, another set of over 100 individual interviews with a different set of grantees beyond the initial interviews allowed us to test our best thinking before creating strategic guidance documents that were shared with our community and grantee partners.

This process highlights some key features of inviting diverse voices to the table that we think are important to mention. First, inviting diverse voices means you should expect a diverse and wide-ranging set of insights. Throughout our process, we found much to compare and contrast. Second, while our partners often shared insights that confirmed the strategic direction that we were heading, we learned much from the times when their insights pointed in a different direction. We were sometimes urged to be bolder in our thinking or to contemplate ideas that we had not yet considered. Even when the insights were not incorporated directly into our strategy, they offered us opportunities to ask new and more powerful learning questions. Finally, we learned that truly incorporating diverse voices takes more time and resources than a more narrow approach.

In Sonia Caus Gleason's experience, "it's not automatic and it's going to slow things down. It's very inefficient, which is a real problem — and a gift. It requires a welcoming of messiness, which is not the natural inclination in the workplace." Nonetheless, creating spaciousness not only supports diverse thinking but allows for more creative insights to emerge from all participants.

> [Bringing diverse voices to the table is] very inefficient, which is a real problem — and a gift. It requires a welcoming of messiness, which is not the natural inclination in the workplace.

Diverse voices in action

Many years ago, I attended a community meeting that was meant to launch a citywide initiative focused on healthy eating and being active. During the introductions, one person raised the issue of someone who should have been invited to the meeting but was missing from the table. Another person did the same during their intro. We ended up spending the entire meeting talking about who else should have been invited to the meeting and accomplished nothing else. The voices that we needed had not been invited to the table and it hindered our ability to step into our shared work together.

And it is often not just a single voice that needs to be invited.

Ammara Ansari described her experience: "You are at political events, or you are doing funder work or you're at a nonprofit, and only certain people get invited to the table. Now, it's only those people who are perceived to either have power, or benefit the other people at the table, or seem to even have a voice. And sometimes those folks end up becoming representatives for entire communities when that's not the case. So you will have to have the one Muslim person show up or the one brown person or the one Arab, the one Black person. And it's only that one person who is perceived as beneficial to the entire group, or beneficial to the cause under which a table is being put together. It's almost as if the experiences and the work and the dedication and the resilience of the other members of that community just don't matter, because that same person who gets invited to that table probably gets invited to a lot of other tables."

In my example above, the group needed to slow down to ensure that the diverse set of needed voices were at the table. Once we got all of the right folks into the room, our work began to move along at a good pace and powerful insights were generated by the group.

A table with a diversity of opinions means that you have many experiences and ideas to draw from. Diverging opinions may lead to new insights. Outliers may shift our ideas about the intended results we are driving toward. Our results may be more sustainable because they are rooted in deeper knowledge.

Diverging opinions may lead to new insights. Outliers may shift our ideas about the intended results we are driving toward. Our results may be more sustainable because they are rooted in deeper knowledge.

To manifest the benefits of diverse voices, we need to intentionally make the space for all of our thinking to be made visible. As Punita Thurman describes, " There's so much value in having the opportunity to make your thinking visible in a room full of diverse perspectives. You develop an understanding of the *why* not just the *what*. Thinking together with people who have different perspectives actually enriches everybody's ideas."

Punita described the table she experienced that most represented this principle: The Coalition for the Future of Detroit Schoolchildren, an independent, diverse cross-section of 150 metro Detroit leaders formed in 2014. The Coalition's charge was to publish a call to action to the state, and then help lawmakers take action to support their recommendations. Punita remembers it as "probably one of the most shaping experiences in my career." In her words:

Thinking together with people who have different perspectives actually enriches everybody's ideas.


Punita Thurman

> There was a convergence of crises across the traditional and charter schools in the state and, if you followed the line of responsibility, it ended up at the state. Charters were governed by universities with boards appointed by the Governor; there was a state-run recovery school district, the Education Achievement Authority with an appointed board; and the district was run by an emergency financial manager selected by the Governor.
>
> Everyone was worried but no one knew exactly why and what to do, so lots of people were trying to solve for it — in different ways, in small pockets. A group of leaders came together, ultimately resulting in six co-chairs, including Tonya Allen, CEO and President of the Skillman Foundation. The steering committee was a cross-section of Detroit leaders carefully curated by the co-chairs: business leaders, labor and unions, non-profit, faith community, parents, educators. The co-chairs thought about what voices were needed and every invitation was made personally by a co-chair, only after all the co-chairs were in agreement. The coalition was grasstops and grassroots — a parent sitting alongside some of the most senior corporate leaders in our region — all working to understand the problems and data and to develop a shared set of recommendations.

I'm not a trained community organizer, but such an admirer of practices that mirror Emergent Learning. The process got the group to really stay together and committed to advocating for these changes. Big, unbelievable policy changes and investment came from the state ultimately because of the recommendations owned by this coalition.

This was an exceptional and incredibly complex effort. But the coalition did not start with the politics. It started with an invitation to people to come together — Detroiters of all sorts. I've sat in a lot of places where there's no clarity of task or timeline. It usually ends up being a lot of interesting conversations and recommendations of what should be done differently — by someone else. It has to be about building a shared understanding of why the problem exists, what contributed to the situation/challenge and fundamentally what we are willing to change too. That's the only way things really move.

Using Emergent Learning to disrupt dominant culture ideas and practices

We cannot discuss how this principle has changed over time without reflecting on the history of race in America. The murders of George Floyd and Breonna Taylor in 2020, and Keenan Anderson in 2023, among so many others, calls on all of us to consider the harms caused by the lack of diversity that has resulted in structural racism throughout all parts of our society.

We think this is a good place to introduce the idea of white supremacy culture and practice in the workplace. We use Tema Okun's (2021) definition here to refer to "the widespread ideology baked into the beliefs, values, norms, and standards of our groups (many if not most of them), our communities, our towns, our states, our nation, teaching us both overtly and covertly that whiteness holds value, whiteness is value." White supremacy culture (also called dominant culture) is the water we are all swimming in and no one is immune from its toxic effects. It gets in the way of appreciating the benefits of inviting diverse voices to the table and results in the tokenization of those that we do invite. By attending to ways that white supremacy culture and practice may show up in our work, we can begin the long-term work of disrupting dominant ways of thinking and invite more diverse ways of knowing into our work.

Having diverse voices in the conversation can disrupt characteristics of white supremacy culture in many ways. ***Worship of the written word*** is the cultural habit of honoring only what is written while devaluing other ways of communication. Diverse voices in the conversation mean that more people can participate in the process of goal-setting in ways that value all forms of communicating and knowing. Distilling insights down to writing may erase culture, wisdom, and knowledge in ways that are harmful and reductionist. Diversity of voice and opinion is also an antidote to ***individualism***.

Diversity of voice and opinion is also an antidote to individualism.

Collaboration is highlighted as an important value within the process of learning and collectivism makes the results of the work stronger. We are able to generate more insights together than we would have alone. ***Power hoarding*** is another characteristic of dominant culture that is disrupted by diverse voices. Creating space for diverse voices can help to neutralize power dynamics that may lead to prioritizing the voices of few over the voices of many. Sharing power means that all stakeholders are valued and leaders realize that sandpaper moments smooth our rough thinking in ways that are positive and generative. Finally, the characteristic of ***urgency*** can be interrupted by the slowing down that is required when bringing diverse voices together. Urgency makes it difficult to be inclusive and makes it harder for individuals to voice dissenting opinions or ideas. As Punita candidly observes, "I'm really aware that lots of my training from the private sector and orientation to dominant culture tendencies can get in my way. I want to move fast. I have a set of ideas about what it looks like when we are making progress and moving forward that's about getting things 'done,' but continue to learn that nothing gets really done unless you have time and commitment to build authentic relationships and trust — especially if you are bringing together people who don't know each other's 'why.'"

Nothing gets really done unless you have time and commitment to build authentic relationships and trust.

A commitment to spaciousness helps to ensure that all voices are heard and decisions are not rushed. As Ammara has experienced, "when there is ample room for creativity, and you get to do things you never get to do otherwise, that to me is a genuine sort of collaboration and bringing diverse voices to the table. And that revolves around respecting other people's opinions and voices and approaches."

Inviting diverse voices to the table can also help bring greater racial equity to your work and begin to equalize power dynamics. Marian Urquilla (2013) brings a great deal of nuance to working at the intersection of racial equity and Emergent Learning. "I think that if you don't hold the EL tools with a racial equity lens or a racial justice frame, then you basically just end up reinforcing the status quo in terms of power relations," Marian observes.

We have to recognize that we are bringing these sorts of dialogue and inquiry tools into contexts that are fraught with power, fraught with conflict, fraught with history.

"We have to recognize that we are bringing these sorts of dialogue and inquiry tools into contexts that are fraught with power, fraught with conflict, fraught with history." As a facilitator, Urquilla describes how "holding a racial equity frame front and center means that you have to be comfortable going into those areas of unspoken-ness and be comfortable and able to create brave spaces where people are willing to risk saying what is (the hidden present and the implicit past) and dream about what could be." When people are in hierarchical relationships with one another, "then you have to negotiate the truth of that power dynamic and how it can shape and distort 'open dialogue.'" She warns that, "the requirement or invitation to 'think out loud in public' that is the heart of the EL processes can have racialized impacts. Who is authorized to speak? Who is willing and able without consequences to make mistakes or expose non-expertness and not knowing in public?"

PRACTICE

Using EL Practices to support diverse voices at the table

Emergent Learning Tables are an excellent way to facilitate a conversation with diverse voices that is grounded in the experience and expertise of everyone involved. They bring teams together to discuss a shared learning question; reflect on a set of past experiences, data, or research findings; and learn together from these past events. They make divergent sets of ideas and opinions visible for all to see and reflect on. EL tables provide a structure to ensure that all voices are heard and represented in the table and everyone can leave the collective conversation with some ideas to test in their individual work.

Powerful Framing Questions help to focus attention on the shared work and vision of the team or organization. Turning a goal or a challenge into a Framing Question is also an invitation to bring everyone's thinking and experience to the conversation. It allows groups to move from abstract thoughts about how something might be accomplished toward concrete actions that can be taken toward common goals. Even those with no background or training in Emergent Learning can engage in creating and answering powerful questions around "what would success look like" or "what would it take to." When diverse voices are at the table, anyone can pose a learning question that helps to refocus the conversation and advance the work.

Before and After Action Reviews can work together with powerful framing questions to create a shared vision of what success would look like. Used together, BARs and AARs allow the group to compare actual results with intended results; explore the causes of those results; and plan for the next opportunity to test out what was learned through the process. As with other EL tools, BARs and AARs are most successful when a diverse set of stakeholders participate in the process. Individuals in the same situation may come away with very different ideas about what happened and why. BARs and AARs help to clarify those differences and harness the power of multiple perspectives in shaping solutions.

None of these practices alone will bring these voices meaningfully to the table if we do not also do our own work. "If we're not doing the inner work, and understanding who we are, and what our triggers are, then we're not doing others a service," warns Ammara Ansari. "And I think we underestimate that a lot, because it's difficult to talk about emotions. But the reality is that unless you keep yourself in check, and you understand where you're coming from, you're not going to be able to communicate with others, and to open yourself up to others in the way that brings them along with you."

> If we're not doing the inner work, and understanding who we are, and what our triggers are, then we're not doing others a service.

Conclusion

Finally, I offer an additional idea to support bringing diverse voices to the table that we have used with great success. I urge you and your colleagues to eat together. I opened this chapter with the image of setting a table and now return to that idea in a literal way. Enjoying food with one another has long been a way for people to connect with one another. It is humanizing and connecting in ways that transcend the principles of Emergent Learning. Eating together brings us into deeper relationship with ourselves and with one another and that is truly the point of bringing diverse voices to the table.

Acknowledgements

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CHAPTER 7

Holding Expertise in Equal Measure

By Laila Bell, MPA (2019)[1] and Andrea Anderson, PhD (2018)

Emergent Learning practitioners work in dynamic environments to tackle tough social challenges. Achieving impact in these conditions takes a deep understanding of the issues we address, collaboration across organizations or roles, and novel ideas about solutions. Social change isn't straightforward, and when we rely solely upon a single worldview or source of knowledge for an issue, we limit our understanding of its many facets and potential solutions. All too often, we are simply unaware of what we don't know.

Holding expertise in equal measure helps EL practitioners and the teams we work with to deepen our understanding of social issues to accelerate change for people and communities. Knitting together multiple viewpoints and sources of knowledge to influence organizational planning, learning, and decision-making yields a richer picture of a problem and better-informed solutions. Using literature, conversations with field leaders, and personal reflection, this chapter explores the principle of holding expertise in equal measure, describing its meaning, practice, and impact on the work.

> Knitting together multiple viewpoints and sources of knowledge...yields a richer picture of a problem and better-informed solutions.

What is holding expertise in equal measure?

Holding expertise in equal measure refers to seeking and using multiple sources of knowledge and perspectives to deepen understanding of a topic. It means recognizing that expertise can come in many forms — from academic research as well as from years of lived experience. The best idea might come from someone who has just joined the group based on their experience in a previous role. These ideas can only come forward when there is strong mutual respect, curiosity, and inquiry.

In this chapter, we broaden the definition of this principle to encompass *both* the wisdom and experiences contributed by the individuals who participate in a learning session *and* the intentionality to cultivate an organizational norm of using diverse types of knowledge to guide action.

[1] The year a practitioner joined the EL Community.

The ability to hold expertise in equal measure is aligned with and dependent upon an organization or facilitator's awareness of power, privilege, and positionality. Therefore, we see this principle as deeply intertwined with the values of race equity, diversity, and inclusion (REDI), which offer a common understanding, language, and tools to do this work well.

HOLDING EXPERTISE IN EQUAL MEASURE

Seeking and using multiple sources of knowledge and perspectives to deepen understanding of a topic. It means recognizing that expertise can come in many forms — from academic research as well as from years of lived experience.

HOLDING EXPERTISE IN EQUAL MEASURE BENEFITS FROM A REDI LENS, INCLUDING AWARENESS OF:

Power: The ability of an individual, group, or institution to influence or exercise control over other people and achieve their goals despite possible opposition or resistance.

Privilege: The status or social advantages afforded by membership in a particular group, either as an unearned advantage or entitlement.

Positionality: The idea that a person's position or relationship with a topic or a community is impacted by their social identities, values, and experiences.

To hold expertise in equal measure, we:

1. **Create conditions where every participant can contribute their knowledge — whether grounded in research or personal experience — to the learning process.** By combining diverse perspectives, the collective wisdom of a group can surpass the knowledge of any individual and participants gain the benefit of learning from the insights shared by peers.

2. **Incorporate multiple sources of knowledge and perspectives to inform organizational decisions.** When organizations establish norms or habits that encourage staff to collect and use multiple sources and voices in the design and implementation of programs and initiatives, they can interrupt unconscious bias to improve strategy.

Why this principle matters

Social challenges are by definition complex. They stem from multiple, systemic, interconnected issues that play out dynamically. No single perspective could possibly encompass the full scope of a social issue. Instead, by weaving together different points of view and types of knowledge, we expand our perspective from one-dimensional to a multifaceted awareness to achieve impact.

ENGAGING MULTIPLE FORMS OF EXPERTISE HELPS US:

- Understand the needs and insights of stakeholders, including people directly impacted by an issue.
- Sharpen strategy by revealing underlying hypotheses and assumptions about how change is expected to occur.
- Test and validate our thinking about what will work in particular contexts and communities, for whom, and why.
- Disrupt social hierarchies to create equitable and inclusive processes or decisions.
- Build collective capacity, interpretation and perspective.
- Increase transparency about what information will be used to guide action and how.

Four shifts to enhance our work

Holding expertise in equal measure invites us to interrogate how we think about the knowledge we use in service of the results we pursue. This triggers four shifts that enhance our work: combating biases, testing assumptions, increasing proximity, and deepening relationships.

Interrupting Patterns of Bias

We are socialized with messages that confer status or disadvantage based on identities like race, ethnicity, gender, or other characteristics like educational attainment or class. These perceptions are reflected in (and reinforced by) the design and operations of the institutions we navigate and the organizations where we work. Reframing expertise helps to interrupt these norms by expanding the notion of who is viewed as credible and capable of contributing to the work, which then challenges us to contend with multiple ways of knowing about a topic. Holding expertise in equal measure interrupts bias by:

- Disrupting the tendency of organizations to enact changes *upon* or *for* communities, instead engaging *with* people who are closest to an issue to guide action through consent and reciprocity.
- Balancing diverse sources of knowledge from academic texts to cultural and experiential wisdom to produce a layered and nuanced understanding of social problems.
- Increasing awareness of power, privilege, and positionality in organizational decision-making and prompting remediation or response.

Testing Assumptions

We all hold beliefs that are grounded in our personal or professional experiences and values. These beliefs shape who we invite into partnership, the practices we use, and the solutions we develop every day. Holding expertise in equal measure helps facilitators or organizations subject their thinking to the scrutiny of multiple perspectives or types of information which can surface and challenge critical assumptions.

I (Laila) observed this in a previous role when a program team reflected on a grant to a large, well-resourced organization that was a trusted partner and consistently produced results. At the end of the project, enrollment for the program had lagged far behind projections. The grantee assumed, given a recent uptick in need, that a particular evidence-based program would be a good fit for the community. However, the assumptions about the cultural fit of the program selected didn't hold.

> Holding expertise in equal measure helps facilitators or organizations subject their thinking to the scrutiny of multiple perspectives.

The grantmakers had an 'aha!' moment.; they realized it is critical to trust the expertise of nonprofit leaders and one way to support their success is by learning how they are using information from multiple sources — especially voices from the community — to create proposed solutions.

Increasing Proximity

Organizations can fail to engage the expertise of people who are most affected by an issue in the design and decision-making of projects or initiatives, often to the peril of their social change effort. Holding expertise in equal measure disrupts this pattern of behavior by prompting organizations to name the perspectives needed to deepen understanding of a topic, identify which voices are missing, and create accountability to use multiple sources of expertise when making decisions.

Milano Harden (2019), Principal and President at The Genius Group, recalled an example from The Campaign for Black Male Achievement. Milano suggested that the Foundation convene a panel of young Black men to talk about their lived experiences, instead of hosting an internal strategy session for program officers. "The young Black men's voices weren't there," remembered Milano. The change was powerful. "[The program officer] was like, 'This is brilliant!' By bringing in the voices of those who would ultimately be affected by the work, what became visible was that philanthropy was talking to itself within itself and hadn't given different weight or priority to the people who they ultimately wanted to reach."

By bringing in the voices of those who would ultimately be affected by the work, what became visible was that philanthropy was talking to itself within itself and hadn't given different weight or priority to the people who they ultimately wanted to reach.

Deepening Relationships

De'Amon Harges, Co-Founder of The Learning Tree, notes holding expertise in equal measure places participants in a different relationship with one another. People are put in the same room where they learn from each other and can form connections that lay a foundation for more meaningful engagement on challenging topics. In fact, deeper, more authentic relationships were a commonly cited outcome among the field leaders we interviewed for this chapter, with each acknowledging this principle requires deliberate attention to building trust- — among participants in a learning process and between organizations and the communities they serve.

The result can be transformational. "People who didn't have certain relationships now have different social capital because others [recognize their gifts and] see them differently," said De'Amon. "So now they're able to get invited. An example of that is in my neighborhood — they call where I live a 'food desert' — but there are some of the greatest gardeners, most of them are elders or have been taught by elders." De'Amon connected the gardeners with church members from a neighboring community. Over time the group engaged with the local hospital in collective action in a project called The Black Market. When that project ended, the group members remained connected, drawing on each other's expertise for other projects.

Why we focus on "expertise"

It is important to note this principle was initially named "Experts in Equal Measure." Experts play a key role in social change efforts. They are often called upon to distill research, praxis, and firsthand experience about what has or hasn't worked to address an issue. However, the notion of who is considered an "expert" is fraught with challenges. As Tracy Costigan (2018), Senior Director and organizational learning leader at the Robert Wood Johnson Foundation found, even using the word *expert* created an unintentional barrier to inviting different perspectives to participate in learning conversations at the Foundation. In 2022, Tracy wrote, "[the title *expert*]...implies a narrow set of formalized, traditional credentials — certain types of academic degrees, jobs held, formal titles — that are privileged and elite. The word expert indicates that one does not value broader ways of knowing, including lived experiences from one's personal life, work life, civic engagement, or otherwise."

This observation prompted a renaming of the principle. To counter the limiting notion of who is regarded as an expert, Emergent Learning practitioners value *expertise*, which is defined simply as intimate knowledge of a particular subject or field.

The word expert indicates that one does not value broader ways of knowing, including lived experiences from one's personal life, work life, civic engagement, or otherwise.

To counter the limiting notion of who is regarded as an expert, Emergent Learning practitioners value expertise, which is defined simply as intimate knowledge of a particular subject or field.

We recognize knowledge is generated in many ways through intuition, tradition, lived experience, and empirical and academic research. The table in Attachment A (at the end of this chapter) offers some examples of various sources of knowledge for social change.

Different forms of expertise live in each of our organizations

"I think once you're within an organization, part of where the expertise in equal measure comes in is the notion of disciplinary expertise within that foundation. So there might be the learning leader in a foundation, but programmatic staff have a particular body of expertise around program content. The President might have a particular body of expertise around containing the whole situation that allows work to be done by managing the board and staff … everyone has a body of expertise that is situated with their professional identity or discipline."

We often think of things like data, research and historical or cultural texts as being the sources of expertise, but people are too. As practitioners, our task is to identify our gaps in knowledge about a topic, determine the sources of information or voices that would deepen our understanding, and then operate with transparency as we synthesize multiple forms of expertise to guide action or decisions. This creates tension as we grapple with when to center, decenter, or balance different information or voices to achieve "equal measure" within the context of the disparate power, privilege, or positionality that affect our projects or initiatives. We discuss this tension later in the chapter.

What does this principle look like in practice?

We see this principle playing out when multiple types of expertise and voices are considered an important component to understanding an issue — much in the same way that each musician in a symphony orchestra or jazz ensemble is respected as contributing something unique to a performance. This can look like assumptions that are grounded in one type of expertise (say empiricism or authority) being challenged or validated by others (say experience, tradition, or intuition). There is humility, curiosity, and respect for the various voices and types of knowledge brought to the table to inform design or decision-making processes.

Humility is a necessary frame of mind for holding expertise in equal measure

We recognized that we had multiple types of capital to deploy in our efforts to influence outcomes for children in Detroit. In a foundation, the type of capital that we typically focus on is financial, but a second type of capital that is leveraged by many foundations is knowledge — subject-matter expertise. I think that developing an Emergent Learning practice has helped us move toward a space of greater humility, which is a necessary frame of mind to hold in order to invite other voices to come into our decision-making space as experts in equal measure. I see that as an important step toward centering equity in our planning and decision making.

Holding expertise in equal measure may result in conflicting hypotheses about how to produce a solution, and that is ok.

Another way that expertise in equal measure may play out in a group is the development of multiple competing hypotheses. Holding expertise in equal measure may result in conflicting hypotheses about how to produce a solution, and that is ok. We ought to resist the norm of working to arrive at a consensus, even if it is momentarily uncomfortable to hold competing ideas because multiple perspectives mean that multiple hypotheses can each hold an element of the truth.

When expertise in equal measure is missing, we reinforce the status quo or business as usual. When the principle is present, we bring in stories, narrative, artistic expression, and other "ways of knowing" into the space. The table below shows examples of when holding expertise in equal measure is present or absent in a group process or organizational decision-making.

What it looks like when expertise in equal measure is present or absent

Present	Absent
✓ We recognize and value people who hold different sources of knowledge.	✗ We privilege education, credentials, or job title as the source of credibility.
✓ We ask what people, perspectives, and ways of knowing are missing from a conversation or organizational decision-making process.	✗ We over-rely on a single type of knowledge or expertise (e.g., data or intuition).
✓ We balance multiple perspectives and are transparent about how decisions will be made, and what information will be used to guide them.	✗ We accept a single notion of "truth" about a topic and assume there is only one right way.
✓ We acknowledge and make visible power, privilege, and positionality in groups or organizational decision-making processes. Facilitators strive to create inclusive and equitable meetings that recognize the gifts every participant has to contribute to the conversation.	✗ We allow hierarchical meeting dynamics that reflect implicit racial, gender, income, or other bias.
✓ We pursue transformational relationships which allow groups or participants to learn with and from one another over time.	✗ We pursue transactional relationships that create a single opportunity for participants to exchange knowledge.

Achieving collective results is a team sport made possible by holding expertise in equal measure

I am an avid football fan. The sport shows what expertise in equal measure looks like in real-time. Although certain members of professional sports teams achieve star status, a win takes leveraging the knowledge of multiple positions who each contribute a different point of view. An array of coaches and coordinators with different roles and specializations prepare the players and develop strategies. Players have a role and set of skills unique to their position, and must understand how to read the field quickly to adapt to changing circumstances. Medical staff often make game-changing decisions to take a player out of the game or patch someone up and send them back in. Analysts at NFL headquarters in New York crunch statistics and send head coaches play-calling instructions based on predictive analytics. While the quarterback is often held up as the most important player on a team, true football fans know that it takes upwards of 100 people with specific knowledge, roles, and points of view during a game to win.

Our work as learning leaders is unfortunately not as cut-and-dry (or well paid!) as professional athletics. Unlike sports teams, we are working to create an ideal that is not often the norm in our field.

How do we create the conditions for expertise in equal measure?

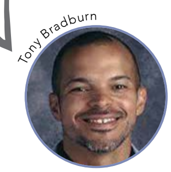
Miles Sandler, Director of Policy and Engagement at The Ewing Marion Kauffman Foundation, emphasizes the importance of assessing gaps in understanding and determining which voices or types of information could address them. “A healthy organization will not just fit people into a broad stakeholder slot — which is what we often see when foundations seek out a ‘person from the community’ to participate in a planning meeting or other event,” said Sandler. “Instead, organizations should be deliberate about identifying the unique voices or perspectives to bring to the table to enrich their understanding.”

Organizations should be deliberate about identifying the unique voices or perspectives to bring to the table to enrich their understanding.

Whether implemented during a learning session or practiced as an organizational norm of using multiple types of knowledge to guide action, each of the field leaders stressed intentionality as foundational to establishing the conditions for expertise in equal measure.

Tony Bradburn, Director for Diversity, Equity, and Inclusion at Township High School District 214 in Cook County, IL, sets expectations at the start of an engagement. "Before the meeting gets going we talk about the protocol and then speak to our added norms that we center and uplift BIPOC voices and that we're leaving our titles at the door," said Bradburn. "It helps to just be preemptive about it."

Before the meeting gets going we talk about the protocol and then speak to our added norms that we center and uplift BIPOC voices and that we're leaving our titles at the door.



A number of individual, group, and organizational actions foster the conditions for this principle:

- At the **individual level** the work to hold expertise in equal measure begins with organizational leaders, meeting facilitators, and group participants examining their own beliefs about expertise and interrogating how their personal power, privilege, and positionality affects how they show up in the work. This takes embracing vulnerability and intellectual humility, which is not always easy as Tracy Costigan reflected from her experience facilitating meetings in new content areas. "I felt really uncomfortable because I knew so little of the research and best practices in the domain that the strategy discussion was focused on and this started to block my ability to facilitate well." Then Tracy switched to focusing on her role in the meeting, "And then it became okay. We named ourselves as facilitators — that was our expertise at that table," Costigan remembered. "This allowed my co-facilitator and I to be more open and less perfect in tracking the conversation; as a result others in the room started to name their own expertise and ask more clarifying questions (and not pretend to understand all the jargon)." This individual work is a necessary precursor to adhering to this principle in strategy or learning sessions or embedding it as an organizational value.

- At the **group level**, establishing norms that value every individual's contributions, building shared expectations about how participants will engage, inviting and managing the tension of different "truths," and clarifying how the information will be used or decisions will be made are key practices during a planning or decision-making process. Andrea Anderson said it's important to, "... really get people comfortable with the fact that there's not one truth. There are a lot of data points or pieces of information that feel like the truth based on where you sit."

- At the **organizational level** practices include: investing in racial equity, diversity, and inclusion training; establishing regular feedback loops; providing adequate time and resources for relationship building before rushing into the work, and maintaining those relationships to learn together over time. This also includes transparency about the types of information that are used to influence organizational decisions. "The sources of knowledge and the sources of data are really important," said Costigan. During strategy reviews and other planning sessions, Costigan noticed that the range of information that prompted strategic pivots was sometimes opaque.

"Sometimes a team might not name their source of knowledge and you wouldn't know if they just spoke to two experts who were excited about a new hot topic, or if they engaged with the community to make a decision about a strategic shift." To check this tendency, Costigan encourages teams to share what they're learning, the sources of knowledge, including who they convened or spoke with, and how that information is influencing program evolutions.

When these factors are in place, Raj Chawla (2020), Principal at The OCL Group, says they facilitate *trust, accountability, consent, and reciprocity*, which are preconditions to holding expertise in equal measure.

What concepts and practices help to foster expertise in equal measure?

The Emergent Learning framework offers a number of concepts and practices that can be used to support the practice of this principle:

EMERGENT LEARNING PRACTICES

Before and After Action Reviews[2] invite people who are actually involved in achieving a goal to think together in real time about what it will take to do it and to learn and adjust together — team sport.

Emergent Learning Tables invite individuals to share their stories, data, and hypotheses to make thinking visible and engage in meaning-making of individual perspectives or different sources of information. The result is a collective understanding of individual experience.

Framing Questions serve as an invitation to everyone to bring their own experience and thinking to the table.

Fuzzy Language undermines individuals and organizations ability to clearly articulate the rationale behind ideas or actions and gets in the way of collective learning. Naming and addressing fuzzy language encourages clear communication, tests for shared understanding among the individuals or organizations engaging in a conversation or action, and encourages sharper and more specific hypotheses.

Learning Agendas elicit clarity about what a group or organization seeks to clarify in order to accelerate progress towards a result, and asks who needs to do the learning in real time. From there, we can identify the perspectives or sources of information to engage to deepen understanding around a topic.

[2] For more on this and other Emergent Learning Practices, see: https://emergentlearning.org/practices/

PRACTICES FROM THE FIELD

The leaders interviewed also shared other tools and frameworks beyond Emergent Learning they use to support their individual or organizational practice of this principle:

- **Courageous Conversations**[3] protocol offers a set of tools for effectively engaging, sustaining, and deepening interracial dialogue so that individuals, groups, or organizations can address persistent racial disparities intentionally, explicitly, and comprehensively.
- **Equitable Evaluation Initiative**[4] challenges orthodoxies in evaluation and learning practices to expand the types of information that are viewed as credible or rigorous and shifts power dynamics so that stakeholders co-create evaluation and learning goals, approaches, and expectations about what success will look like.
- **Factor Analysis** ("The 5 Whys") is a structured team process that assists in identifying underlying factors or root causes of an event (Serrat, 2019). A technique commonly used in Results Count (Annie E. Casey Foundation, 2017) and planning processes, groups or organizations can conduct a factor analysis to build a shared understanding across multiple perspectives or sources of information.
- **Lived experience engagement** is a practice used to improve federal research, policy, and practice, based on people's lived experience. The Office of the Assistant Secretary for Planning and Evaluation within the U.S. Department of Health and Human Services studied effective strategies for lived experience engagement (Skelton-Wilson, et al, 2022).The report offers valuable insights, including a logic model of lived experience engagement initiatives and tips for creating a meaningful engagement that Emergent Learning practitioners invested in holding expertise in equal measure will find useful.

Earlier we described the tension caused by balancing different voices and sources of information to achieve equal measure. Different voices and sources of information lead stakeholders to form different hypotheses, no one inherently "right," but without being explicit about sources of expertise and without working to make thinking visible, this can lead to tensions.

[3] See https://courageousconversation.com/.

[4] See https://www.equitableeval.org/.

Kelci Price

Kelci Price (2015) reflected on this polarity with us. As the learning leader at The Colorado Health Foundation, she helped the strategy team seek out experts with different worldviews to inform the foundation's behavioral health strategy. This resulted in very different strategic options for the foundation to consider: a more traditional approach representing a medicalized worldview of behavioral health and grounded in providing more mental health clinicians to more people, or an alternative approach grounded in the viewpoints of experts with lived experience with behavioral health challenges and rooted in non-clinical services provided within the local community. There was no right or wrong understanding of the challenge or solution, just very different ideas based on very different worldviews. Because of the influence that peer experts had on our thinking, we were able to point out that if we move in one direction, we would essentially be trying to reform traditional clinical systems from within traditional power structures. But if we support this other type of solution, we would be supporting the power of those in recovery and in local communities to structure choices about how recovery happens within that community context. Neither of these are wrong, they're just different perspectives on the challenge and the solutions. There's truth in both. But by making them visible, we were able to ask, 'Which relationship with power do we want to have?'

Which relationship with power do we want to have?

Expertise in equal measure calls us to listen deeply to understand.

Marilyn Darling

Embracing the principle of expertise in equal measure is not about how decisions get made, but about making sure that multiple, diverse, important, unexpected perspectives are invited into the process leading up to decisions, and that people feel valued and heard. It's not about relinquishing role responsibility to make decisions.

From a learning perspective, the worst possible outcome would be to try to 'wordsmith' all of those perspectives into some mushy hypothesis, or find some way to include a perspective that is antithetical to the intent or values of the work. So it's not about blindly "trusting" a variety of perspectives, but exploring them to see how they could expand our options or make our thinking about how to pursue them more nuanced. To help us ask the questions we are not asking.

Conclusion

The experience of writing this chapter collaboratively could not have been more ideal, given the subject matter. We embarked upon the work together with no idea of how differently we each viewed this principle. In our debates throughout the writing and editing process we each tightened our grip on certain positions and leaned into a new way to think about others. *Practicing* the principle of expertise in equal measure as we worked together was at times joyful, and at other times a bit frustrating, but we emerged with a deeper relationship and new ways of looking at our own work.

Acknowledgements

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APPENDIX A: SOURCES OF KNOWLEDGE[5]

Knowledge is generated in different ways. The table below shows several ways of acquiring knowledge in the social sciences.

Source	Description	Example in Social Change Efforts
Intuition	Knowledge gained without being consciously aware of its source.	A program officer's "gut feeling" about the dubious intentions of a prospective partner in the work.
Tradition	Knowledge is gained through the transmission of social practices or customs.	Religious or cultural views that inform a group's dietary practices.
Tenacity	Clinging stubbornly to ideas because they have been repeated, despite evidence to the contrary.	A political campaign repeating a slogan spreading misinformation about the fiscal impact of a proposed policy change.
Experience	Awareness or understanding of a topic gained through first-hand exposure.	The insights from a client who experienced a recent rule change in a nutrition assistance program.
Authority	Knowledge gained from those viewed as authority figures is often determined by formal education or credentials.	The recommendations of a university-based researcher with a decade of experience designing nutrition assistance programs.
Empiricism	Making observations, gathering particular facts, and formulating generalizations based on those findings.	Themes from a five-neighborhood listening tour that explored communities' attitudes, values, and access to healthy foods.
The scientific approach	A method of acquiring knowledge consisting of systematic observation, measurement, and experimentation through the formulation, testing, and modification of hypotheses.	Findings from a randomized control trial evaluating the impact of a nutrition assistance program on participants' health outcomes.

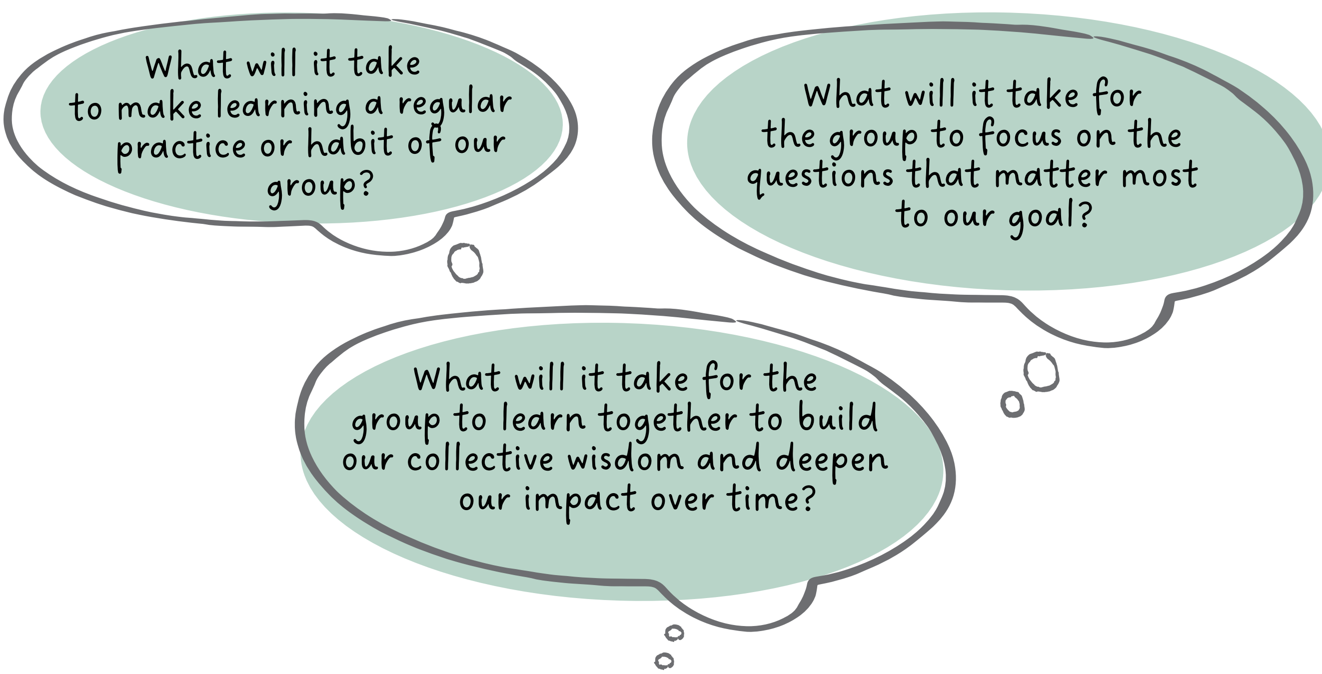
5 Jackson, S. L. (2012). Research methods and statistics: A critical thinking approach. Belmont, CA: Wadsworth, Cengage Learning. https://ibave.weebly.com/uploads/1/0/7/4/10741354/applied_research_ibave1.pdf

CHAPTER 8

Stewarding Learning Through Time

By Sarah M. Smith , MSW, MPH (2019)[1]

Imagine that you recently joined or started working with a group. What are you noticing about the habits and regular practices of the group? What are you noticing about the culture around learning? Maybe the group meets once a week to provide structured report outs — there are good updates but not much discussion or a clear connection back to shared goals. Perhaps there is a series of learning sessions for the group that feature smart speakers, but with little focus on connecting what was learned back to the work. As an Emergent Learning practitioner, you start to wonder: what will it take to make learning a regular practice or habit of our group? What will it take for the group to focus on the questions that matter most to our goal? What will it take for the group to learn together to build our collective wisdom and deepen our impact over time?



[1] The year a practitioner joined the EL Community.

This chapter explores the principle of **stewarding learning through time** to help us understand how we can nurture the conditions and capacities necessary for groups to engage in iterative learning practices.

Before continuing with the rest of this chapter, I want to emphasize that it is possible to practice this principle in small and big ways, in tacit and explicit fashions, and with formal and informal structures. You do not need a major operational or cultural shift to begin building the habits of a group to engage in an iterative practice of learning. However, practicing this principle can result in big shifts over time. The many variations in what stewarding learning through time looks like in practice makes it accessible to a wide range of professionals looking to strengthen their Emergent Learning practice in various settings and contexts.

What is stewarding learning through time?

Fourth Quadrant Partners[2] (2021) describes stewarding learning through time this way: "Learning practices have their greatest, most visible impact when they are done iteratively, over time, focusing on the questions that matter the most to a group. Stewardship does not mean doing the learning for a group; it means holding the intention for a group to do its own learning and helping them build it into their regular way of working."

STEWARDING LEARNING THROUGH TIME

Nurturing the conditions and capacities necessary for groups to engage in iterative learning practices and habits to explore the questions that matter most to their work.

In other words, stewarding learning through time starts to shift a group's culture by helping to transform learning from one-off, disjointed activities to an iterative cycle of asking and answering questions to accelerate and deepen impact.

[2] Fourth Quadrant Partners transformed into the nonprofit Emergent Learning Community Project in 2023. For more information, see https://emergentlearning.org/history/.

STEWARDING LEARNING THROUGH TIME AND GROWING A LEARNING CULTURE

With this principle guiding the work, groups aspire to:

- Identify key questions with potential to accelerate or deepen impact
- Keep these questions front and center as the work progresses
- Engage in regular reflection to unearth assumptions, hypotheses, and insights
- Weave together knowledge and insights in a way that creates a whole that is greater than the sum of its parts (Darling, Guber, Smith, & Stiles, 2016)
- Apply what they have learned back into the work
- Track and deepen their understanding of how thinking evolves over time

While it is rarely a linear process, taken together, this work creates the foundation for growing a learning culture.

Why does stewarding learning through time matter?

By engaging in iterative learning practices and habits to explore the questions that matter most to their work, groups can generate insights and ideas to propel the work forward. Gladys Hairston (2020) reflects, "I define this principle as necessary to organize work from a series of 'good ideas' to something that is purposeful and thoughtfully designed."

> Without clear stewardship of learning over time, lessons become anecdotes that are difficult to translate into meaningful change and improvements.

She elaborates, "Without clear stewardship of learning over time, lessons become anecdotes that are difficult to translate into meaningful change and improvements."

The role of stewardship also matters as it supports the group's ability to sustain its focus on its central learning questions. Looking closer at the stewardship role, Tanya Beer (2013) shares, "So much of stewarding is constantly gauging what is the capacity of the team. When you work in enormous complexity and uncertainty — of course the team has a hundred learning questions. There is so much uncertainty in the system. Stewarding is helping people decide where to focus in that mess, how to keep it just enough to not swamp them, and how to make it happen with the least amount of friction."

Additionally, many practitioners of Emergent Learning work on complex issues, meaning there are high levels of unpredictability and uncertainty surrounding the decisions and situations of a group (Snowden, 2007). There are no quick and easy solutions to complex issues. Stewarding learning through time helps groups identify and test potential solutions, learn from what's working and what's not, and build a shared knowledge base to grapple with what could otherwise feel like intractable problems. Tanya elaborates further, "Accumulating shared wisdom is only possible if you're stewarding in a way that builds and refines understanding about what it takes to make change happen. For me, this is the true measure of playing the role well."

There is so much uncertainty in the system. Stewarding is helping people decide where to focus in that mess.

What does it look like when stewarding learning through time is present or absent?

Present	Absent
✓ Groups can clearly articulate their key learning questions.	✗ A lot of one-off learning activities exist that do not add up to greater understanding, capability, or improved results.
✓ Because learning is iterative, a group can see its skills around a particular question or its impact around a particular goal accelerating.	✗ Commitment to maintain learning practices decreases, and learning related work is deprioritized as 'nice to have'.
✓ People develop a shared sense of competence and confidence around what might have previously felt like a recurring barrier.	✗ Groups and teams operate with a "business as usual" mindset.
✓ Learning becomes "just how we do our work here."	✗ People have a weak line of sight from their work activities to their goals.
✓ Groups maintain and intentionally reinforce their energy to practice learning behaviors, and highlight better outcomes as a result of effective learning habits.	

It is important to remember that nurturing a group's learning practices and habits is a journey and is not linear. The opportunities for influence and change ebb and flow due to factors outside of our individual control. I was reminded of this when working with a group where I believed we were on track to see big results indicating that learning through time was really happening. Just a few more repetitions with our learning practices and I was convinced we would be able to check all the boxes that the principle was present. However, before we saw these big results, we ran into significant internal and external challenges. In a matter of days, I went from confident in our ability to steward learning over time to questioning whether we were practicing the principle at all. This was an important reminder that the work is not linear and that we can't think of the principle as a list of things to check off a list. It also prompted me to think about other signs to look for as a steward to understand (in the shorter, messier term) if we are practicing the principle of stewarding learning through time.

When you feel stuck in your efforts to practice this principle, try developing or revisiting your hypotheses about what it will take to get there. This can help you identify whether the principle is present or growing in your current context. In my case, I started to look for:

- **Groups making time to slow down their thinking**, creating the space and an opportunity to identify what is driving decision making. I hypothesized that if groups explore the data, insights, and hypotheses behind their decision making, then it would be easier to develop a shared sense of competence over time.
- **Groups naming the challenges in their work.** I hypothesized that if groups identify challenges, we would be better positioned to help groups identify and articulate key learning questions.
- **Groups asking for Before and After Action Reviews**[3] or debriefs. I hypothesized that if a group experiences the benefits of learning, the appetite for learning will increase and learning habits will be reinforced.

Breaking it down in this way helped me understand how I could continue practicing the principle in a way that met the group where they were in the current moment.

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3 For more on Before and After Action Reviews, see https://emergentlearning.org/practices/.

The principle in practice: What it makes possible

Two members of the Emergent Learning Community shared stories to illustrate what this principle looks like in practice and what it makes possible.

Adjusting to a new reality

In 2020, Rex Fyles (2018) found that stewarding learning through time could help his team at Gender at Work navigate new terrain. Gender at Work is an international feminist knowledge network that works to end discrimination against women and build cultures of inclusion. Most of their work takes place in Africa and Asia (Gender at Work, 2018). During the COVID-19 pandemic, Gender at Work had to transition all its offerings online. Rex shares, "When the pandemic came, we were floundering for a period of several months." The Gender at Work team came together around the shared learning questions, "What will it take for us to create intimate experiences online? What will it take to enable people to dig into their lived and embodied experience of gender in ways that make them feel empowered to make changes in their context?"

What will it take for us to create intimate experiences online?

What will it take to enable people to dig into their lived and embodied experience of gender in ways that make them feel empowered to make changes in their context?

Through regularly occurring workshops with primarily African and South Asian facilitators and participants, the team had many opportunities to learn. Rex supported the team as they thought about what they had tried, what worked, and what they could do differently. After each virtual workshop meeting, the team would reconvene to discuss what they had learned and what they would try next time, using the practice of Before and After Action Reviews. Rex shares that there have been many lessons learned about what did not work, and by intentionally learning over time, the Gender at Work team has been able to test and refine its hypotheses to create intimate spaces where people can dig into its lived and embodied experience of gender. He believes the practice of learning over time led to participants feeling more confident, motivated, and skilled to advance gender equality in their contexts, which is their overall goal. Rex believes this was a critical moment for his team as they would not have been able to advance work towards their mission or live into their values without finding ways to adjust to the new reality.

Learning in real time

Another example of what stewarding learning through time makes possible is highlighted in Cheryl Francisconi's Emergent Learning Case Study (Francisconi, 2019). Cheryl was the director of an Institute of International Education (IIE) leadership development program in five countries (Ethiopia, Nigeria, India, Pakistan, and the Philippines) funded by the Packard Foundation. When the program came to an end in 2011, they completed a participatory evaluation. Cheryl elaborates, "All the participants who were involved went out to collect stories of impact. They learned so much about what they did right and what they didn't do right. The tragedy was, we should have known it along the way." Fast forward to 2019, when Cheryl was a member of the Emergent Learning Cohort program and the Packard Foundation asked IIE to conduct a needs assessment based on the current leadership landscape in Ethiopia. Cheryl began integrating Emergent Learning practices like Before and After Action Reviews and started a Learning Log[4] to keep track of key insights. Having this structure created a constant flow of reflection throughout the process. Instead of waiting until the end of a program to learn, she was creating the conditions to steward learning through time. She shares, "In the end what came of it was so much better. It was a constant flow of information and a chance to constantly reflect on how it was weaving together."

Role of a steward

The role of the steward is an important aspect of this principle and can't be overlooked. As Emergent Learning practitioners, many of us will adopt the role of a steward, helping to hold the intention of a group's learning and nurturing the capacities and conditions for them to engage in an iterative cycle of asking and answering questions.

The steward may be a person or group of people and can change over time. Sometimes this role is played by an external consultant, other times staff with a formal learning role, and other times staff without learning formally in their titles.

You don't have to have a formal learning function or learning role to steward learning. As Rex reflects, "Stewards bring a particular 'attitude' — a desire and ability to ask learning questions. Anyone on a team can develop and make use of that 'attitude.'" Regardless of who is playing the role of steward at any given time, stewardship involves cultivating and tending to the practices and habits that make learning over time possible.

Stewards bring a particular 'attitude' — a desire and ability to ask learning questions. Anyone on a team can develop and make use of that 'attitude'.

4 For more on Learning Logs, see https://emergentlearning.org/practices/.

> The job of the steward is to hold the questions, remind people of the questions, [and] help host the flows of information back into the conversations at the right times…

This could involve coaching a group to identify and keep key questions front and center; facilitating conversations to unearth assumptions, hypotheses, and insights; or playing back information to help a group keep track of its thinking. A steward also proactively helps a group to notice learning opportunities that are in front of them, allowing a group to learn in real-time as opposed to just looking back in the rear-view mirror.


Tanya Beer

Tanya Beer reflects on the role of a steward: "It's about helping the team to hold the thread on the iterative cycle and flows of information and reflection as they go about the business of their work." Tanya continues, "For me, it involves owning responsibility for reminding folks about the practice, the habit, and adherence to the principles — when we're getting lazy with our language, when we aren't making our thinking visible, when we're not acting as experts in equal measure. Being that constant reminder of practice." She adds, "The job of the steward is to hold the questions, remind people of the questions, help host the flows of information back into the conversations at the right times, crystalize insights with people, and help them find ways to share those insights in the right places. It is a process host."

Learning polarities/tensions to steward

To be effective, it is important for stewards to consider how to explain and model learning principles and practices while navigating interpersonal dynamics, taking into account groups' unique contexts and organizational cultures (Clark, 2018; Engage R+D, 2022). Acting as a steward, you may encounter polarities or tensions around:

- When to take a tacit approach and when to take an explicit approach
- Balancing the need for structured opportunities for learning against embracing emergence in your plans
- The degree to which you are taking ownership of aspects of the process versus building the capacity of the group to have collective responsibility for learning over time

These polarities and tensions are described in more detail below.

Identifying when to take a tacit vs. explicit approach

In some cases, it is most helpful for the steward of learning to tacitly introduce the principles and tools of Emergent Learning to support learning through time. This can allow a group to experience the benefits of practices and habits while keeping focused on their work. For instance, Cheryl Francisconi has tacitly used Emergent Learning practices in her work with clients. Sometimes she starts with simple questions, such as asking people if they would be willing to reflect on the meeting or event. This provides an opportunity for her to tacitly integrate Before and After Action Review questions. Her clients quickly start to see the benefits of this reflective practice. In one case, several months after she had tacitly begun using the Emergent Learning practices, the client asked if she was "doing" Emergent Learning and expressed an interest in learning more about the thinking behind the practice and habits. Cheryl emphasizes, "If you are practicing it, you are modeling it. You model something, you don't have to talk about it all the time."

Gladys Hairston also believes a more tacit approach is helpful as she works to refine and implement learning practices at her organization, which established a formal role for learning in 2020. She shares, "I'm hoping more tacit approaches will help this feel less daunting for people to wrap their minds around.
This will hopefully help us break our learning into small chunks that feel less theoretical and [more] attached to a specific offering related to a defined change we hope will take place."

In other cases, it may be helpful for the steward to be explicit about the thought process behind the practices, especially when working to build the capacity of others to steward learning, or in groups or organizations that already place a high value on learning. Additionally, being explicit can be helpful for building trust and buy-in with the leadership of a group or organization. For example, I have taken time to explain the practice and tools that facilitate stewarding learning through time to our full leadership team. This helps leadership trust that the energy invested in learning will have a positive impact on the work of the team over time. It also provides me with more opportunities for collaboration and freedom to experiment to find what works to create the conditions for learning.

If you are practicing it, you are modeling it. You model something, you don't have to talk about it all the time.

Balancing structure and space for emergence

To steward learning through time, Emergent Learning practitioners should consider balancing the need to create structured opportunities for learning and reflection with the recognition that learning doesn't happen on a neat and orderly timeline. Opportunities for learning can emerge at unexpected times.

At the Houston Endowment, Russell Ramsey (2019), has created a regular monthly opportunity for program staff to reflect on questions related to their Learning Agenda. These monthly reflections are then played back to the staff during mid-year retreats so that the group can see how their thinking has evolved over time and integrate new understandings into future plans. This structured process creates accountability for learning and contributes to building a team learning habit.

Tanya Beer is currently working with the McKnight Foundation's Director of Learning, Neeraj Mehta (2019), to create a learning approach for the Foundation's staff that provides a structured cycle paired with the flexibility to respond to learning opportunities that emerge along the way. For example, they include learning-oriented conversations in scheduled events like Board meetings and also practice building learning habits that are not meeting-dependent. To do this, they are looking for the naturally structured moments when they need to crystalize things, like the preparation of a quarterly Board report, while also building habits for learning outside of these structured moments.

Understanding the responsibilities that you should own

The steward's role is not to do the learning for a group (Fourth Quadrant Partners, 2021). This means that when you step into the role of a steward, your purpose is not to interpret information for the group, generate the insights, or develop ideas for next steps independently. However, you will often need to take ownership of aspects of the process to keep the questions front and center and remind people of what they have learned before. You may find yourself needing to own more aspects of the process at the beginning of an initiative, when the team is eager and excited to get the work moving, and at times during implementation, when a group feels stretched thin due to multiple competing priorities. You may also need to own more aspects of the process when working with organizations or teams where there is not already a strong culture of learning.

Owning aspects of the process as the steward may include such tasks and activities as scheduling or hosting meetings, facilitating conversations, keeping notes in a Learning Log, or even reminding a group that they have already learned important insights about an issue on the table that should be revisited and incorporated into the next opportunity for action.

The key point to remember is that even when a steward owns responsibility for aspects of the process, it is still not the steward's responsibility to learn for the group. It is important for the steward to reflect on the extent to which owning responsibility enables a group to learn, but doesn't absolve the group of its collective responsibility for its own learning and to explore the questions that matter most in its work.

> A group is more likely to apply what it is learning if its members are invested in the process of asking and answering questions that matter most to them.

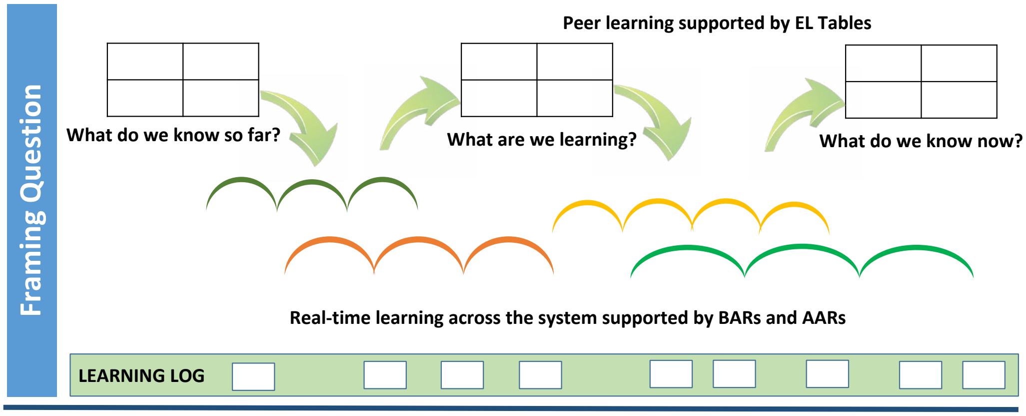
Why is it important for a group to develop a collective responsibility for learning over time? A group is more likely to apply learnings if its members are invested in the process of asking and answering questions that matter most to them. There are also opportunities for learning important insights that are not visible to the steward in time to take advantage of them. For instance, our program officers and directors at the Blue Cross Blue Shield of North Carolina Foundation are in regular communication with their grantees and partners. While I often play the role of internal learning steward, I am not present for most of these interactions. However, because there is a collective sense of responsibility for learning over time, the program officers keep key learning questions front and center and leverage opportunities for real-time learning with grantees and partners to inform their work and bring important insights back to our organization.


Sandra Wegmann

The balance between the learning steward's individual responsibility and collective responsibility can change over time. In fact, for many Emergent Learning practitioners, it may be intentional to transition ownership for stewarding learning through time to the group. Sandra Wegmann (2016), an independent consultant and an Emergent Learning Advanced Practitioner, described working with a collaborative for two and a half years. As a new collaborative with a set of co-chairs and volunteers, Sandra took on the role of steward because there was a "constant stream of competing priorities." Along the way, Sandra introduced different ways of reflection that members of the collaborative could act on themselves, which in turn increased the collective appetite for learning. While Sandra still plays a coaching role, her experiments of turning more ownership back to the collaborative resulted in a shift in the responsibility for learning through time. Reflecting on what it took to evolve her role, she says, "At some point I realized I had some attachment to aspects of the learning role, and that, in fact, other individuals were able to take some of those responsibilities."

How Emergent Learning practices help people support this principle

Taken together, the platform of Emergent Learning practices can facilitate learning through time.



The suite of practices helps the group focus its learning (Framing Question), understand what is known so far (Emergent Learning Table), learn from the work in real-time (Before and After Action Reviews), reflect on what has and is happening (Emergent Learning Table), and capture key insights (Learning Log). An overarching Learning Agenda can help organize the different components and make the plan for learning over time clear to members of the group.[5]

You can start practicing this principle anywhere and build out from there. You do not need to start with a framing question. For instance, one group may start by integrating the Before and After Action Review cycle into its work. As a result, they start to develop a better understanding of the questions that matter most to the group to explore over time. Others may find it helpful to start stewarding the learning of a group through the use of a Learning Log, keeping track of data and key insights that emerge during a group's meetings. They can then share back the data and insights from the Learning Log to prompt the group to reflect on what they know so far through an Emergent Learning Table. There is no right or wrong place to start. It will depend on your unique context and the dynamics of the group.

What gets in the way?

Stewarding learning through time is about cultivating the iterative practices and habits that allow a group to learn. Emergent Learning practitioners may face several challenges as they work to embrace this principle. A few of these challenges and potential solutions are described below.

[5] For more on these and other EL Practices, see https://emergentlearning.org/practices/.

Big and broad questions: A group may choose a broad learning question in order to be inclusive of many perspectives and to reflect their ultimate long-term goals. However, this can result in a group's learning questions feeling too large or long-term for initial conversations. Russell Ramsey elaborates, "Without breaking the learning question down over a short time horizon and making connections back to it, it feels like looking too directly at the sun." A steward can help a group identify digestible questions that are most relevant in the moment and to the people present while holding the thread back to the big questions.

A long list of questions: The issues groups are working on are complex, so there are naturally many questions tied to the work. To narrow and prioritize questions, it is helpful to consider the decisions and opportunities coming up on people's calendars. What questions, if explored, could have the most impact on these decisions and opportunities?

What questions, if explored, could have the most impact on these decisions and opportunities?

Making it too complicated: There is a tendency to over complicate the learning process. The issues a group may be working on are complex; however, the processes to support the work do not need to mirror the same level of complexity. Cheryl Francisconi shares: "It is beautifully simple. What are we learning from doing our work? What is happening along the way? We can figure out how our outcomes map to our indicators, but those things don't allow us to feel and see it." She adds, "Learning is such a beautiful dance, if we are doing it with a scientific mind. I can remember some of the old indicators we had, including how many leaders are raising new funds for their programs from new donors." And, Cheryl says, "That's great and we do want to know if they are doing that. But as we are going along, we want to be reflecting and learning from all of our activities through Emergent Learning practices over time, not just those we identified as indicators at the beginning." Importantly, Cheryl points out, "There is a lot of richness there we could miss if we are just focused on the indicators. What's fun about it is that it is simple. Simple doesn't mean easy, but it's not complicated. We don't need to over complicate or over think it."

What are we learning from doing our work?

What is happening along the way?

Organizational culture: As Sandra Wegmann notes, "It takes psychological safety, humility, the ability to make mistakes and learn from them, and group adaptability." If you are running into challenges with stewarding learning through time, consider: Which aspects of the culture facilitate learning and which create barriers? While these may be out of your individual influence or control, you can account for them in the design and implementation of learning practices.

Knowing where to start: Sometimes it is hard to know where to start. If you feel stuck or unsure, try applying the principle of stewarding learning through time to your own practice. As Tanya Beer notes, "we tend to forget to hold ourselves to the same habits and principles." Try completing a Before Action Review to understand what success would look like for you, and continue the Before and After Action Review cycle while you build out hypotheses and generate insights around what it will take to steward learning through time in your role.

Lack of confidence: Emergent Learning may be new to a group. People may feel unqualified or unsure of how they can apply the practices in their work. Practice and repetition can help build a group's confidence with Emergent Learning practices and principles. Additionally, identifying opportunities for early "wins" can help groups gain confidence in applying the practice in their work. The Before and After Action Review cycle is often a nice entry point for groups to build their confidence and see more immediate results.

Conclusion

Stewarding learning through time is about nurturing the conditions and capacities that make it possible for learning to become an iterative practice focused on the questions that matter most to the group. When groups steward learning through time, it helps them accumulate collective wisdom and skills to get the results they want. This chapter provided examples and insights from several Emergent Learning practitioners around what it takes to make learning a habit. As you continue in your practice, I encourage you to keep coming back to test your own hypotheses around what it will take for the groups you work with to make learning together a regular practice to build collective wisdom and deepen impact over time. During your work with groups and when you reflect on your own practice, remember what Cheryl Francisconi so wisely shared, "It is beautifully simple. What are we learning from doing our work? What is happening along the way?"

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CHAPTER 9

Returning Learning to the System

By Jeffrey Poirier, PhD (2019) and Kimberly Spring, PhD (2021)[1]

The analogy about identifying an elephant by touching it illustrates the final principle in this guide, **returning learning to the system**. Say that a group, more than just needing to identify the elephant, must find a way to move it. Each member of the group, with blindfolds on, touches different parts of an elephant — the trunk, an ear, the torso, a foot, the tail — without knowing what's in front of them. They may separately draw very different conclusions about the object before them and what it would take to move it. Each person may be convinced that they are correct because of their individual experience and the data they've collected, but the elephant is large. Group members miss the broader picture because of their limited perception; they are only able to describe and learn from their individual experience. However if, as a group they share, co-interpret, and make sense of the data they have each collected, they may together be able to correctly conclude that an elephant is in front of them and to identify an effective way of moving it.

Now imagine that instead of an elephant, the group is trying to understand and move a system or an organization's culture. This is the power of returning learning to the system — a practice vital to tackling complex social issues. In this chapter, we start by defining the principle of returning learning to the system, talk about why it is important, describe how we think about "systems," and offer an illustration of this principle in practice. After that, we describe four key benefits. We show how different tools and approaches can help to put this principle into practice. Next, we share guiding questions to help apply this principle and describe ways of working that can support or hinder returning learning to the system. Lastly, we present additional practice examples and key suggestions for getting started returning learning to your own systems work.

Returning learning is not linear. It's iterative, ongoing, multidirectional and layered. It's not just grantees telling us what they learned to simply inform our work; nor is it the Foundation telling grantees what we are doing. It builds over time, as part of a series of learning loops. And, returning learning can be layered, meaning that different individuals in the system may be trying to answer questions with a slightly different lens. For example, a program officer might want insights to inform ways to sharpen strategic focus, a community organization might want to learn about best practices to strengthen their work and support community outcomes, and a board might ask questions about broad impact. If this system is operating under a shared framing question, each is contributing to the others' learning, even with a slightly different lens.

[1] The year a practitioner joined the EL Community.

Throughout, we share anecdotes and quotations from interviews with learning practitioners to further illustrate the principle in action. We also provide thoughts on what avoiding blind spots looks like in practice, and how this principle can broaden our understanding of the big, complex issues in front of us.

What is returning learning to the system?

As you've seen elsewhere in this guide, Emergent Learning is about how to draw and apply insights from data gathered through collective efforts to inform your thinking and decisions — and, ultimately, to strengthen your line of sight and improve your results. Returning learning to the system can be applied in a variety of contexts, including team projects, the execution of a strategy area in a foundation, the implementation of a new policy in a nonprofit or public system, or the evaluation of a program or a community-based initiative.

Returning learning to the system focuses on how a whole system learns from and acts on information, experiences, and insights to explore different paths to achieving outcomes. Individuals and groups can start by processing data and information that contributes to their knowledge, new insights, and ongoing learning. It is important to consistently return learning to the system if you want to tackle big goals in complex environments and allow for diverse stakeholders to bring data and experience into view. The principle helps groups adapt to new, evolving, and challenging issues and contexts; generate and share insights; and work together to develop and implement better solutions.

RETURNING LEARNING TO THE SYSTEM

How a whole system learns from and acts on information, experiences and insights to explore different paths to achieving outcomes.

What does returning learning to the system make possible?

This principle makes data and experience visible. By consistently gathering data and sharing their own stories and perspectives, participants can take stock and learn together. Activities like data walks provide interactive opportunities for individuals who play various roles within a system to process and reflect on data together. For those organizations that fund or commission data collection, returning learning helps move away from more conventional practices in which funders hold these data for their own purposes. Returning learning also invites additional insights from diverse stakeholders to share and collectively reflect on what a group is learning.

Returning learning can also be as simple as regular check-ins across teams working on similar challenges to ask each other, "What are you learning in your work?" Complexity theorists use a bee's waggle dance (2023) to illustrate how important frequent and timely data-sharing is to the health of the hive. A bee's waggle dance says to the other bees in the hive, "There is nectar in that direction!"

Significantly, returning learning to the system builds capacity to experiment and explore new hypotheses, which can happen informally or formally. One structured approach is through an iterative plan-do-study-act (PDSA) process. This systems-learning cycle creates an environment to learn collectively *and* apply and test what you have learned, ultimately bringing forth more data and often new insights. The PDSA process begins with defining a problem and planning the change you want to test. Participants then carry out tests of potential solutions; collect and reflect on data from before and after the change; and make decisions, implement solutions, or make adjustments based on those results. For example, Marian Urquilla (2013), co-founder of the Center for Community Investment, engages in this practice to adjust curricula as she moves through the cadence of a program. "This cycle of small tests helps us understand what is working and what is not, and make real-time adaptations to improve the curriculum and the participants' experiences."

> This cycle of small tests helps us understand what is working and what is not, and to make real-time adaptations.


Marian Urquilla

Creating regular feedback loops is a core practice for this principle. Decision makers and other stakeholders should have and reflect on as much information as possible to assess the best approach, examine trade-offs, and inform the path forward. Returning learning to the system strengthens their capacity to assess and prioritize information and make sound decisions. Feedback loops equip individuals at all levels of the system to collectively use the learning, understand how the learning applies to their work, and to share their understanding with others.

Returning learning to the system is literally about closing the loop in the learning cycle. Even if you apply all the other Emergent Learning principles well, if you aren't sharing learning with others and applying that learning to practice — returning it to the system — then you are limiting progress and change.

Everyone, regardless of position, can have a role in returning learning. As Anne Gienapp (2014) from King County Metro shared, "Learning is not just for initiative or program staff. Everyone can be a learner, so it's important to think about how and where and what learning should be returned to different parts of an organization or system. It's important that organizational leaders, boards, and partners learn as well." Intentionally bringing people together to create spaces to return learning to the system is also valuable, and individuals or organizations like funders can take on this role. "Never underestimate the power of convening, and having a convener that can also be the holder of the process and the container," says Catherine Lester of The Annie E. Casey Foundation. "These are important contributions to how returning learning happens. Our role at Casey has been to hold the container … the magic is what partners bring into the container."

Everyone can be a learner, so it's important to think about how and where and what learning should be returned to different parts of an organization or system.


Anne Gienapp

What it looks like when returning learning to the system is present or absent

Present	Absent
✓ Individuals and groups across the system, especially those doing the real work of an initiative, project, or other collective effort, find ways to share what they are seeing, doing, and learning regularly, in fit-for-purpose ways. ✓ Results are visible, and missteps and failures are as important to learn from as are successes.	✗ No news is good news. ✗ There is no appetite for learning and/or learning is seen as a big, cumbersome process that happens only infrequently. ✗ The core team (the funder or other organizing group) is the hub, but really a gatekeeper, for learning activities and sharing. ✗ If members do experiment, they keep it to themselves.

A system is a group or network of individuals working toward a common goal or goals.

What do we mean by a system?

A *system* is a group or network of individuals working toward a common goal or goals. For the purposes of this chapter, a system could be an informal group of stakeholders or a more formal structure that brings stakeholders together: a team or department, a whole organization, a public agency or even a community (a neighborhood or city).

A system can also be some combination of these, with smaller groups and networks operating as smaller systems within the larger one. Returning learning to the system requires recognition of the important role that individuals have in systems, contributing to and applying collective learning.

"As a default, we might think of returning learning to the entire organization, but sometimes within this there are different lenses or angles underneath a framing question. Different teams within an organization may have specific insights that influence their work," notes Tracy Costigan (2018) of the Robert Wood Johnson Foundation. "When you have an overarching framing question, teams within the organization (as a system) can return the learning that came through their own lens — and, in turn, inform other teams with different lenses," Tracy says.

It is essential to define the system that needs to learn in the context of your work. This can help identify and clarify who should contribute to learning as this principle is put into practice. Further, these individuals may also be situated in a larger ecosystem in which multiple systems interact. For example, an ecosystem may consist of the various services and sources of support in place for youth and young adults. Within this ecosystem are individual systems — such as networks of nonprofit organizations, formal public systems like education and child welfare and community leaders and mentors — which may or may not be coordinating and working together in service of shared results.

Within a system, there may be disagreement or a lack of clarity about the goals, or conflicting perspectives across different individuals and stakeholder groups on how best to achieve those goals (i.e., their line of sight). Inequitable power dynamics and isolation among parts of the system can cause tension and limit the transparency and trust needed for collective learning. Ultimately this can lead to different and sometimes conflicting strategies, approaches, and practices — creating particular challenges to returning learning. One strategy to address this challenge is to authentically invite different perspectives into the work. As Natalie Portman-Marsh (2014) of NPM Consulting shared, "It's important to be explicit in seeking diverse feedback so that the insights that are being returned to the system represent various perspectives. This will help to eliminate confirmation bias or reinforce a status quo. All people offering their input should be able to then see their influence and insights into what is being returned to the system."

All people offering their input should be able to then see their influence and insights into what is being returned to the system.

The Annie E. Casey Foundation's two-generation approach to local community change


Kimberly Spring

From 2013 to 2020, The Annie E. Casey Foundation supported an effort to integrate a two-generation approach into local community change efforts in three communities. The effort involved complex sets of partnerships that included Casey, local funders, service providers and the backbone organization responsible for both managing the broader community change effort and leading the two-generation efforts to coordinate supportive services for young children and their parents or caregivers.

While Casey had identified key principles and practices for effective two-generation approaches, it did not specify a singular two-generation model to be used. Instead, the Foundation felt it was important to allow for various approaches that could respond to the assets, needs, networks, and contexts of each community. In addition, Foundation staff wanted to enter into the work as partners — providing information about what they knew as well as resources to support the local work — but allowing the local collaboratives to determine what was needed and how to use the resources.

This innovative approach required both Casey and the local partners to stretch and learn new ways of interacting with one another. Not surprisingly, it also led to some tensions as the partners learned how to work together in this way. A central tension emerged between the position of the Foundation as a partner that held knowledge and resources external to the communities and that of the local collaboratives, who held knowledge of their own context, including local relationships and assets. As they implemented the effort, the partners needed to figure out, in real time, what it would take to function as true partners, with Casey sharing what it knew without prescribing an approach and the local partners determining the direction that they would take.

This innovative approach required both Casey and the local partners to stretch and learn new ways of interacting with one another.

To help it and its partners learn through this process, Casey funded an evaluation to gather information on how it entered into the communities as a partner to the local collaborative and other funders. The evaluation was designed to collect information from across all of the partners in the effort, with a focus on the experiences and perspectives of those in the three communities. The third-party evaluator facilitated spaces for the partners to reflect on the data, name any tensions and identify adjustments.

For example, Casey had technical assistance support that it could provide to the communities but did not want to be prescriptive about what technical assistance should be provided. Instead, the Foundation wanted the local partners to identify what they needed. While Casey staff assumed that this nondirective approach helped to position them as partners, leaders in the communities perceived this approach as withholding critical information. How could Casey's knowledge about the principles and practices for effective two-generation approaches inform local thinking about what technical assistance would be most valuable? And how could the local partners make a technical assistance request if they didn't know what assistance was available? The local partners appreciated the flexibility, but they also needed more transparency.

Casey wanted the local partners to identify what they needed.

While the evaluation was able to identify the tensions, it was the process of returning learning to the system that allowed Casey and the local partners to understand each other's perspectives and experiences and apply what was learned to how they were showing up as partners. Findings from the evaluation were shared with the local community organizations and the Casey team and its consultants, with opportunities for the groups to gather and discuss what the findings meant and how they could be addressed. Through that learning and sharing process, the partners were able to explore new ways of identifying and providing technical assistance. One result was the recognition that a one-time workshop, while informative, typically was not sufficient to help the local partners apply what was learned in meaningful ways. In response, Casey and the local partners worked together to develop a technical assistance framework that included several phases to allow for learning and application. Thus, they were able to adapt and partner together to develop and implement a better solution.

Benefits of returning learning to the system

Returning learning has four core benefits that can contribute to better, more equitable processes and results. First, by allowing individuals to share their perspectives and collectively identify and find ways to test their hypotheses, this principle helps groups to identify and mitigate blind spots and challenge assumptions and mental models.

Second, if you integrate other Emergent Learning principles (e.g., inviting diverse perspectives, holding experts in equal measure) into the process, the principle of returning learning can also promote equity. Privilege can elevate the voices of some individuals and groups, so it is important to intentionally work toward valuing and including diverse perspectives as groups learn and share in the process. Returning learning also helps to prevent the systematic exclusion of certain groups from access to information and knowledge, which can further limit their ability to effectively advocate for change. When individuals are actively invited to share their ideas, experiences, and insights, they are better equipped to contribute to decision making and practice. This can build agency and capacity for communities to develop their own solutions. The process "may also elevate the very different perspectives on an issue, heighten empathy for others' experiences, and create a more fluid understanding between different members with different roles engaged in a shared experience," says Portman-Marsh. "This is especially useful in funder and grantee relationship-building and within efforts to co-design and co-create community change."

Third, when conducting research and evaluation or collecting data to inform continuous quality improvement, the process of returning learning to the system provides the structure to apply learning to practice and engage fully in the PDSA iterative cycle.

> While Emergent Learning provides the prompts to help people be clear on what they are learning, the principle of returning learning to the system brings people to an understanding of why they are learning.


Anne Gienapp

A number of years ago, I worked with a foundation as they were sunsetting a special initiative after seven years of investments. As the initiative was coming to a close, there was a desire among organizational leaders to do some learning-focused evaluation, with the hope that the foundation could understand what to do better in the future. It was honestly kind of sad to begin learning-focused evaluation at that point, when the initiative was sunsetting, because there wasn't going to be any good opportunity to apply the learning that came out of that evaluation effort. This is a great example of how important and useful it can be to return learning to the system across the lifespan of an initiative — for example, what are learnings that are relevant to the grant-making process, grantee engagement and relationships, the relevance of outcomes, the realistic timeframe for certain goals, or how findings are reported and shared?

While Emergent Learning provides the prompts to help people be clear on *what* they are learning, the principle of returning learning to the system brings people to an understanding of *why* they are learning — ensuring, according to the Casey Foundation's Allison Holmes (2021), "that there is a purpose for research, that the information gathered through research has a place to go." The learning cycle is helpful to integrate into the life cycle of projects and initiatives.

As Anne's story illustrates, returning learning to the system is a principle that can be integrated over time throughout your work.

Finally, returning learning to the system can foster experimentation and help partners work more efficiently. It can help prevent — or at least minimize — repeatedly asking the same questions and repeating mistakes, and enable teams to work smarter both today and in the future by being more grounded in real-time data and information. As Tracy shared, "Over time, our focus — our line of sight — has sharpened, different and more powerful questions have been asked, and participants are more willing to be open, sharing insights and ideas that are based on stories, data and examples. There's less emphasis on perfectionism and more on inquiry and experimentation." Ultimately, this also builds participants' capacity to nimbly act on what they are learning.

Tools and approaches that support returning learning to the system

While any of the Emergent Learning tools can help you to return learning to the system, this chapter focuses on four: (1) Learning Agendas, (2) Before and After-Action Reviews, (3) Emergent Learning Tables, and (4) Learning Logs.[2] Together, these tools collect and aggregate thinking from diverse individuals and perspectives to generate shared insights and identify patterns.

Learning Agendas can support returning learning to the system by providing a structure for real-time learning conversations as activities progress, at the midpoint of an activity, or as a project ends or evolves into new work. Learning Agendas should explicitly name how a group intends to involve diverse stakeholders in collective learning. Significantly, a Learning Agenda can name the customers for what the team is learning, and help the team think about how to involve them in learning activities (e.g., inviting them to BARs or AARs).

[2] For more on these and other Emergent Learning practices, see https://emergentlearning.org/practices/.

> If [the] system is operating under a shared framing question, each is contributing to the others' learning, even with slightly different lenses.

Tracy Costigan

The Robert Wood Johnson Foundation has experimented with layered Learning Agendas, in which different parts of the system have specific learning questions that are nested under one larger framing question for an effort. In one example, the program officer guiding the strategy, the board and leadership guiding the budget, an intermediary, and the health practices team each had different learning questions under the larger framing question.

According to Tracy, "A program officer might want to generate insights to inform ways to sharpen strategic focus, a community organization might want to learn about best practices to strengthen its work and support community outcomes, and a board might ask questions about broad impact." She's noticed that "if this system is operating under a shared framing question, each is contributing to the others' learning, even with slightly different lenses."

As Tracy shared, "while each part of the system had a very specific learning question, when they came together for reflection and analysis (through BARs, AARs, and EL Tables), they were collectively sharing insights related to the overarching framing question. In this way," she noted, "while different parts of the system may focus on different pieces of the project objective, when each returned their learning to the system, greater progress was made to the overarching goal."

Before and After-Action Reviews (BARs and AARs) support a process of reflection before and after an activity that, when used iteratively, offers a PDSA structure for returning learning. Groups share their assumptions and thinking as they plan for an activity, examine what occurs through the activity to generate insights, and identify what actions they will take based on what they've learned. Invite people who have done this work before to the BAR to learn from what has been tried in the past. Invite key stakeholders for your learning objectives ("customers") to participate in your AAR, as this tool helps groups reflect on actual results, what contributed to the results, how to sustain or improve practice, and opportunities to test what has been learned in future activities.

Iterative BARs and AARs can be part of an ongoing response process in environments with continually evolving contexts and shifting conditions. Consider co-developing community meetings through BARs and AARs to develop shared decision making and attention to continuous quality improvement. However, as Natalie points out, the process "may be unfamiliar to community partners, and in fact [it] may take some time for trust to develop among the members, recognizing that there is no right answer, just a candid sharing of experiences that is actually what is desired in the process."

Emergent Learning (EL) Tables take groups through a cycle of sharing information about what has happened in the past and reflecting on its meaning in the present. EL Tables are a collective process in which each person brings a unique lens. They support deeper reflection on data and stories related to a framing question.

EL Tables help identify new insights that can inform a new hypothesis — or idea — being tested. What emerges from an EL Table conversation can be shared with people outside the learning process. This is one way EL Tables help return learning to the system, invites more perspectives to the conversation, and advances the virtuous PDSA cycle.

As part of an EL Table, groups can step back and ask what it will take to return learning to the system, so that everyone is benefitting from the experiments and experiences of everyone else with their hands on the work.

EL TABLE CONVERSATIONS

It is often helpful to summarize the insights gained in an EL Table conversation for outside audiences. The following script can be a good starting point:

- On [date], [describe who convened].
- The question we came together to address was [FQ]
- This question matters to us because [describe your own context].
- Reflecting on our past experience [describe], we discovered that [insight].
- [Repeat or expand on this, covering both things that worked and why, as well as things that did not work as well and what you learned from these experiences.]
- Keeping in mind our upcoming opportunity/opportunities, which include [describe]...
- We identified [one or more] hypotheses that we think are worth trying out: [List ONLY each hypothesis you think is relevant to your own opportunities]
- We plan to actively test these hypotheses [optional: using BARs and AARs to deliberately turn these opportunities into learning experiments], track our results, and refine our thinking over the next [describe the timeframe (i.e., month, year, etc.)]
- We will know we are succeeding if [describe measures or indicators].

Learning Logs document what a group is learning and communicate it with other stakeholders, strengthening efforts to develop deeper insights about the work. A Learning Log provides a structure for capturing details of activities, intended results and achievements, and insights about what contributed to results so individuals and teams can discover opportunities to test new perspectives and ideas. The group can review and apply this information together or individually. An EL Table can be helpful for this purpose.

Over the past four years, The Emergent Learning Community Project, (formerly Fourth Quadrant Partners) and its program faculty have conducted weekly one-hour Friday morning learning calls, using a learning log kept on a shared spreadsheet as the platform for the conversation. Participants take a few minutes before the call (or even at the beginning of the call) to think about what has happened during the week that might hold a lesson or a challenge worth reflecting on with their colleagues. The log entries may consist of just a few words to prompt the conversation. The person who added the entry begins by describing what happened. As colleagues discuss the situation, patterns might emerge from comparing stories. During the conversation, other participants often add insights to that entry on the log. Participants can sort through the log at any time to see the learning history of a particular project or search through their own insights. "Over the years, this simple process, which requires zero planning, has returned learning to the system perhaps more powerfully than any other learning conversation I participate in," observed Marilyn Darling. "It is really just as a by-product of talking, in a trusting space that we have developed together over time, about what matters to each of us right now, and about projects that we might not otherwise know about."

Over the years, this simple process, which requires zero planning, has returned learning to the system perhaps more powerfully than any other learning conversation I participate in.

When feasible, applying these four tools in interconnected ways can maximize a group's ability to return learning to the system. BARs and AARs can be used to test hypotheses identified through an EL Table. Learning Agendas can frame the learning approach, and Learning Logs can synthesize the activities and the results of learning. In addition, there are several other tools and approaches — such as data walks, peer consultations, the Results Count® approach (Annie E. Casey, n.d.), implementation science, participatory action research and continuous quality improvement processes — that offer tools and principles in support of returning learning to the system.

GUIDING QUESTIONS TO PUT RETURNING LEARNING INTO PRACTICE

Below are guiding questions to help you put the principle of returning learning into practice. Reflecting on these questions can help kickstart your thinking about when, how, and with whom to apply this principle. You are encouraged to consider what other important questions are relevant to your team's work.

- Who are the partners to be included in reflecting on data, identifying insights and developing and testing hypotheses?

How do we create safe spaces for collective learning?

- How do you create spaces that allow for the transparency and vulnerability needed to learn collectively — for example, how can the group address power differentials, territoriality, expert/professional mindsets, and/or the fear of admitting failure/retribution for disclosing mistakes?
- What types of data are needed to make informed decisions? Who else has experience you could draw from to inform this decision?
- How do you ensure that you are testing your assumptions and taking in multiple perspectives?

What data are needed to make informed decisions?

How are assumptions being tested and multiple perspectives included?

- How do you ensure that the time and space for learning is built into how you do the work, so that learning doesn't feel like something you do "on the side" or as an "extra" thing?
- How do you provide for iteration, or the idea that learning occurs in a continuous cycle? How do you track and reflect on changes that occur along the way?
- What types of processes/practices/infrastructure do you have to support the learning process? What could/should you do to make changes to support that process?
- To what extent is there accountability within the system to encourage partners to learn from data and experience and use that learning to guide actions?

How do we build time and space for learning into the work we do?

Ways of working that influence the ability to return learning to the system

> Returning learning to the system requires curiosity and an understanding of the need to pause and reflect.

Some of the ways we work can either enable or impede returning learning to a system, such as: a "fixer" mindset embedded in conventional funding relationships; the tendency of funders and leaders to define "success;" a reliance on leadership-endorsed "experts" to facilitate learning, or; a culture that privileges short-term outcomes and discourages learning from mistakes.

As Veena Pankaj (2019) of Eval4Learning, notes, "returning learning to the system requires curiosity and an understanding of the need to pause and reflect. It's admitting that you don't have the answer and allowing for a certain level of vulnerability to invite others to explore with you." Yet when the work is framed around a defined problem that needs to be solved — as it often is in conventional funding relationships — it can lead to a "fixer" mindset, where organizations and systems are rewarded for identifying and applying the "right" solution. Once a solution is identified, groups often close off their ability to recognize data and that do not align with that solution, thereby limiting opportunities to apply and test alternative hypotheses.

> Returning learning to the system can help partners move from a 'fixer' to a 'builder' mindset, so that they begin to think about their work in terms of hypotheses rather than strategies.

"Returning learning to the system can help partners move from a 'fixer' to a 'builder' mindset," Marian Urquilla (2013) notes, "so that they begin to think about their work in terms of hypotheses rather than strategies." By recognizing that systems are complex and fluid environments, groups can open themselves to the possibility of multiple hypotheses and solutions. When groups apply the returning learning principle, they have opportunities to formulate multiple hypotheses that can be tested and refined in practice. This can help partners avoid a recurring loop of learning the same lessons over and over.

Another challenge relates to the fact that funders and administrators typically have control over how success is defined, what questions will guide learning and how resources will be used for learning. As a result, learning tends to be focused on those things most relevant to *their* decision making. Less attention is given to the day-to-day operational conditions that allow those engaged in the work to reflect on it. When this happens, learning becomes a burdensome additional step for practitioners.

My father was a scientist, so his entire career was premised on trying and failing. Something in my home was normed on trying and failing. But in a lot of systems and settings, this is counterintuitive and there is a lot of risk to failing. We see this in terms of how partners come to the table with us as a funder too. There is a hesitancy to admit when something doesn't go well. We need to acknowledge power dynamics, and model our own learning and course correcting as a funder too. Otherwise, you won't end up with anything real as you try to return learning within groups like grantees and other partners.

Organizational-level and operational-level learning are equally valuable but distinct activities. Learning that is focused on day-to-day operations strengthens learning at the organization level, since it helps to ensure that the processes and resources are applied in ways that are most relevant for practice.

When learning is positioned as something that should be led by "experts" and for the benefit of those in leadership positions, it becomes a top-down process that places limits on who has the opportunity to learn and the spaces where learning takes place, and it tends to exclude local knowledge and may not be relevant to the practice on the ground or responsive to local priorities, cultural context, and needs. As Bill Shepardson of The Annie E. Casey Foundation notes, "when people collect multiple perspectives but do not truly believe that these multiple perspectives allow for better decision-making, the process never moves beyond the performative. Those in positions of authority need to believe in its value, provide the resources needed for it, and listen and respond to the perspectives of others."

When people collect multiple perspectives but do not truly believe that these multiple perspectives allow for better decision-making, the process never moves beyond the performative.

When you engage partners who work at different levels within the system, you can be more intentionally inclusive and give attention to how learning applies to on-the-ground practices and the experiences and priorities of those being served. In this way, knowledge shifts from something that is collected and archived to something that is constantly evolving, providing the building blocks for developing and testing real-world hypotheses.

Involving partners in the sensemaking process, as Veena notes, "requires a certain level of spaciousness that can be at odds with the culture of urgency that exists in many organizations." It is important to ensure that the appropriate time and resources are available and partners are given the opportunity to slow down and reflect. "Too often, people want to get to the final quadrant of EL Table, so insights are offered instead of data and future-oriented hypotheses instead of insights," Marian Urquilla notes. "They are so future-oriented that in their effort to move forward, they forget about where they've been."

> We need to normalize that making mistakes is going to happen, and what we can do when we make mistakes is learn. This is why the principle of returning learning to the system is so critical, because what good is it to make a mistake or fail and that's just the end of it? The better scenario is to make a mistake and learn.

Furthermore, learning from mistakes and fostering safe learning spaces are key to putting this principle into practice. As Catherine Lester shared, "Learning typically happens when things don't go well, so we need to think about power imbalances and attend to creating spaces where people feel comfortable to share all aspects of what they are learning." Anne Gienapp also emphasized that failure and making mistakes often evokes fear about potential consequences, so establishing an environment of safety and trust when it comes to learning from failure is critical to put this principle into practice. "We need to normalize that making mistakes is going to happen," says Anne. "And what we can do when we make mistakes is learn. This is why the principle of returning learning to the system is so critical," she adds. "What good is it to make a mistake or fail and that's just the end of it? The better scenario is to make a mistake and learn."

"When the work is driven by political considerations and not by experience, a premium is placed on performance," says Bill Shepardson of The Annie E. Casey Foundation. "In that type of environment, there is a tendency to count things as opposed to focusing on whether the effort is making a difference. As a result, immediate needs may be met, but root causes go unaddressed." Shepardson illustrates this with the case of two organizations that were dedicated to addressing issues related to housing instability and homelessness. One of those organizations focused on rapid rehousing, counting the number of individuals they were able to rehouse. "Their numbers were amazing," he says, "but when you looked at the trend over time, in the city's total number of people who were experiencing homelessness or were precariously housed, those numbers had not changed."

[When] a premium is placed on performance…there is a tendency to count things as opposed to focusing on whether the effort is making a difference.

The other organization spent time gathering multiple perspectives, including from those who had experienced homelessness and housing instability. By gathering information from across the system, they were able to develop an approach that took the whole system into account, one that was intentionally designed to address the root causes. By bringing this learning back tothe system, they were able to achieve both short-term increases in getting people housed and long-term decreases in the overall rate of homelessness and housing insecurity, even during economic downturns. "That type of environment — where individuals gather and listen to multiple perspectives, especially those with lived experience of the issue — that is where Emergent Learning has the greatest potential to help the work," reflected Bill. "Of course, this is not to say that it isn't important to provide rapid rehousing for individuals — in fact it is a badly needed intervention," he said. "But it is important not to conflate those numbers with the type of systems change that is needed to make sure people don't experience homelessness or insecure housing in the first place." It is by returning learning to the system that partners have the opportunity to find sustainable solutions to big issues, like homelessness, within complex environments.

…where individuals gather and listen to multiple perspectives, especially those with lived experience of the issue — that is where Emergent Learning has the greatest potential to help the work.

Returning learning to the system: Tips and additional practice examples

As mentioned earlier in this chapter, when learning is being returned to a system, groups establish feedback loops for sharing information and generating new insights. We recommend being open to trying different approaches to establishing these feedback loops. When starting a new area of work, we recommend bringing together a diverse group of stakeholders for a BAR to discuss how you might put returning learning into practice. This review could include a team you are working with already or individuals representing a larger group with whom you are hoping to share learning from your activity. Be sure to discuss and identify your intended audiences and how they might be involved. Part of this discussion should focus on how you will engage others in what you are learning and how they might participate in the learning process more directly (e.g., co-interpretation of data to generate new insights).

Natalie Portman-Marsh

One of the ways in which this principle engages diverse voices at the start is to ask, "What do we already know?" Participants from different roles and perspectives may come together to launch an initiative by sharing, from their perspective, what has worked and what has been less effective in their experience. This approach is inclusive and brings everyone in as an expert in their own experience, providing agency to the researcher and the meeting planner.

Additionally, it may be helpful to start by defining a core framing question, if one has not already been identified, that everyone in the system is working toward, as well as individual learning questions that can vary depending on the part of the system they represent. You can discuss and gather input from other stakeholders on how (with whom, why, how, when) you intend to share what you are learning from your framing questions. For example, The Annie E. Casey Foundation recently embarked on a cross-foundation learning journey focused on how it is joining communities that are working to improve outcomes for youth and young adults. Although the work is still in its early stages, the team has found that naming learning values, defining learning questions and explicitly stating learning practices have helped to define how the Foundation can return learning to the system.

The team has found that naming learning values, defining learning questions and explicitly stating learning practices have helped to define how the Foundation can return learning to the system.

Regular meetings that bring together stakeholders from within and across a system to reflect on data, experiences and practices can be part of putting this principle into practice. These meetings may be used to share ideas with your partners as part of your annual planning process; to engage community members and other stakeholders in the design, implementation, and interpretation of performance management, research or evaluation projects; or to share data and learning with an organization's board of directors.

In all of these cases, consider how conversations might include affected communities who might not otherwise be represented. As part of a group you can identify ways to share and compare stories, identify patterns, and generate insights — and use them to test new ideas and adapt your practice moving forward. You can also share this information outside the group, such as with a community of peers.

Think about the ways in which sharing data encourages transparency and facilitates real-time adaptations to strategy and approach. At the same time, Natalie Portman-Marsh points out that participants should understand "the level of flexibility and change associated with a system." She warns, "To ask the group to share their perspectives, identify new insights that would be relevant to the community of practice, and then not make the adaptations could backfire. Seeking input is important, but only if the organization is committed to an openness to change in its behavior and practice."

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Learning consultant Veena Pankaj also shared how returning learning to the system was core to the effort that her previous organization took when it revamped its performance review process. The effort began by gathering reflections from full staff about their experience with performance reviews both within and external to the organization. Using the four quadrants of the EL Table, they were able to co-create a new way forward by generating insights and new ideas, grounded in the experiences shared by staff. Veena notes it was through this effort that they were able to develop and implement "a revised, asset-based approach that focused on staff learning and growth rather than solely on accountability."

Incorporate approaches for sharing data and gathering insights, building these activities into work plans for implementing strategies, programs, and policies. These approaches will provide opportunities to assess how a given strategy, program, or policy is progressing toward the intended results and to apply insights on an ongoing basis. As you begin to return learning to the system and engage others in what you are learning, it will be helpful to periodically review how your efforts are progressing and identify ways to refine your approach. Together with those from across the system who are integral to applying the learning, consider what happened with past learning efforts and collect insights on what worked well and what didn't.

Then brainstorm hypotheses around what will make you successful this time around, and be willing to experiment with these various hypotheses to try different approaches, practices, and tools. Remember that the goal isn't to find the "right" answer — that adaptability is critical in working within the complex and shifting context in which learning takes place.

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As we noted above, there are a number of other approaches and tools that can complement and support the process of returning learning to the system. This includes The Annie E. Casey Foundation's Results Count® leadership development approach, which supports social sector leaders in accelerating their impact on outcomes for children, youth, and families. Results Count provides leaders with customized skills to support collective efforts to gather and use data to reflect on strategies or theories of change and assess progress toward a defined result. The approach emphasizes bringing together a range of partners to reflect on progress and promote change at a systems level.

Bill Shepardson, a staff member at The Annie E. Casey Foundation, and Marian Urquilla, who serves as a Results Count faculty member, note how many of the Results Count practices resemble those of EL, such as collecting, analyzing, and using data to reflect on and improve practices, services, and products — and using those data and the insights to inform and improve processes. At the same time, they recognize the particular strength of Emergent Learning, as Marian articulates, "to support complex, adaptive systems work and to allow for a way to anchor the work when results need to shift because of broader environmental changes, like a pandemic." Bill notes that the practice of Emergent Learning has helped those who participate in their Results Count program "think about whose perspective is being incorporated in the analysis of data and be intentionally inclusive when they use the data to make decisions." When combined, these two approaches can help systems to engage in continuous learning and improvement, while strengthening the capacity of partners to both align collective efforts toward shared results and be nimble in complex and shifting environments.

Conclusion

This final principle in the guidebook focuses on how a whole system — a group or network of individuals working toward a common goal — learns from and acts on information, experiences, and insights gathered from those within the system. Returning learning to the system, like other principles covered in this guide, requires a commitment to developing skills in applying the principle, as well as ongoing practice, reflection, refinement, and experimentation. As Catherine Lester shared, "learning is reciprocal and not just a person 'with expertise' imparting knowledge; it is multidirectional, and that's crucial." The principle of returning learning to the system can be applied in a variety of contexts and helps to make data, experience, and insights visible. In practice, the principle involves regular feedback loops, which build the capacity of groups to assess and prioritize as they make decisions. This principle is foundational to effective learning practices and intersects in powerful ways with the other principles in this guidebook. The examples, guiding questions, and suggestions for getting started are intended to provide ideas to inform your practice.

> Learning is reciprocal and not just a person 'with expertise' imparting knowledge; it is multidirectional.

Everyone is a learner and can contribute to returning learning to the system. Even if you are just beginning a learning journey, you will likely have stories and insights that can shape your thinking and how you move forward. If you approach your learning with the right intentions — to find ways to meaningfully put this principle into practice in your work — don't worry about potential missteps. Even the missteps along the way can powerfully shape and benefit your learning practice as you strengthen your skills in returning learning in your work. It is important, too, that funders and program administrators model an openness to learning — and returning learning to systems. It is, after all, emergent.

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CHAPTER 10

Connections

By Avery Eenigenburg, MSA (2020)[1]

One of my favorite things about the diversity of peoples and languages on this planet is how much beauty, depth, and complex meaning a single word can hold. Earlier this year, I traveled to Zimbabwe for the first time. Near a local school, I noticed a mural: children playing in front of a brilliant orange and yellow setting sun, with the word *ubuntu* boldly written below. It means *I am because we are.*[2] It's one of those words you want to cozy up in and sit with, because there is so much there. When I see you, hear you, understand you, then I better understand myself. That is the essence of connection.

I've thought a lot about *ubuntu* since, particularly in the context of Emergent Learning. The idea of *ubuntu* is at the core of what Emergent Learning is all about. EL focuses on learning in the context of relationships — between one idea and another, between ideas and action, between strategy and implementation, and between people.

In the context of our shared humanity and our complex, messy circumstances, EL helps create the conditions for learning and for creating connections between people. The most important information in any ecosystem lies not within individuals themselves, but in the relationships between them. Hence, *ubuntu*. I am because we are. I understand the essence of who I am by understanding my relationship to you: What is it that connects us? How do we dance within that connection? Who am I to you and you to me? What is the potential that exists because *we are*?

> Ubuntu.
> I am because we are.

Similarly, Emergent Learning is not a set of discrete principles and practices designed to dance on their own, without connection. The principles were intentionally pulled apart in this guide so that we could take a deep dive into each one. Now, we want to knit them back together. First, we'll explore how principles connect to each other, and how those connections help us explore our own mental models and learning cultures and how to shift or strengthen them. Then, with that larger picture in mind, we want to look at how EL connects with and supports other approaches to social change.

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1 The year a practitioner joined the EL Community.

2 It is hard to fully translate the meaning of *ubuntu* into English, and it has several meanings. This is the one that resonated most with me. See: https://www.africaw.com/african-philosophy-ubuntu-a-way-of-life for more.

The relationships between EL principles helps create richer learning in three ways: through deepening what we know about the context we are learning in, nurturing that context to create the conditions for emergence, and sparking connections that didn't exist before now. This intersectionality is one of the things that makes EL so powerful, and more than a framework or process. It is what makes it a whole greater than the sum of its parts. Learning in the context of relationships creates the dynamic, secure space we need to courageously explore new territory and think creatively together.

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Context

Context is the setting in which our work happens. It can be shaped by people, culture, dynamics, history, finances, dilemmas. In Emergent Learning, principles help us dig deeper by surfacing the nuances of context that might otherwise be invisible to better understand them, so that we can experiment with solutions that are fit for a particular context. Context is actually implied within our framing question: [In our context], what will it take to…? This then invites all types of data and stories into the conversation, so that we can compare contexts and learn our way through the question we are trying to answer.

[In our context], what will it take to...?

Without taking context into account, we attempt to boil the ocean. We are tempted to ask broad questions like: What will it take to prevent lead exposure in young children? The principles of EL help transform the question into a contextualized learning challenge: What will it take for healthcare providers and nonprofits to work together to prevent lead exposure among young children in our community? In other words, what will it take to prevent lead exposure *here*, in the context in which we're all living and working together? What stories and data can we "rub together" on our way to making sense of what is happening and deciding what action to take?

What stories and data can we "rub together" on our way to making sense of what is happening and deciding what action to take?

Janine Saunders (2020) notes how holding expertise in equal measure, making thinking visible, and inviting diverse voices to the table all intersect to deepen understanding of context. She shares that this "allows us, if we are willing, to uncover biases that should be addressed and uncover insights that may have been made invisible." Brittney Gaspari (2020) and Rebecca Ochtera (2019) add that the intersection of these three principles also "helps level the power dynamics, create space for understanding why different points of view exist, and the drivers of those differences." Together, this brings clarity to how different experiences and backgrounds shape insights and potential solutions to the problem at hand and what they might look like in different contexts.

Lauren Gase (2020) adds that when we weave freedom to experiment into these other principles, it helps the group discover connections between an array of experiences, data, and insights on their way to crafting a useful experiment. "Different sources have knowledge about a piece of the problem or a piece of the solution," says Lauren, especially in terms of bringing a "wealth of experience and knowledge about solutions… [and] rigorous evidence of what does or does not work in various contexts." Janine also points out that "Diverse voices are more likely to bring a diverse set of expertise to the work — from lived experience to work history to academic research," and "inviting diverse voices means that all ideas are welcomed into the discussion and are interrogated with respect."

Furthermore, when we promote deep understanding of contextual factors, we design better experiments that resist the status quo. And, as we steward learning through time and invite diverse voices, we are better equipped to make sense of the results of those experiments because we better understand the context. The added benefit, as Sarah Smith (2019) suggests, is that this can go a long way "to preventing learning through time from perpetuating existing inequities." Connecting EL principles together helps us approach a problem in the full frame of its complexity, so that we learn our way to solutions that fit the unique circumstances at hand.

Connecting EL principles together helps us approach a problem in the full frame of its complexity.

Conditions

Social change is not a linear process. In the EL Community, we often talk about "creating the conditions" for emergence. What we mean by this is that we don't always know what will emerge from our learning, but we want to nurture an environment in which the seeds we plant through learning are given an opportunity to grow into a breakthrough. How does applying the principles of EL help us learn in complex contexts and harness our collective creativity to create the conditions for deep social change?

We create the conditions by focusing on improving the "soil" for emergence. For starters, Chris Tebben (2020) and Rachel Bland (2020) suggest explicitly using EL principles as meeting norms to "set the container" for learning together (Tebben & Bland, 2023). Chris adds, "The principles serve as shared values and reference points that can help a group stay on course through vulnerable or difficult conversations." Within that container, creating the conditions means holding space in a meeting for everyone to bring their creativity and agency to the conversation.

The principles serve as shared values and reference points that can help a group stay on course through vulnerable or difficult conversations.

PRACTICE

Learning culture conversation starters

The Present/Absent Tables in each of the previous chapters are an excellent way to start a conversation about the learning culture in which you are working and how to create the conditions for learning in your particular context. How would you rate your own learning culture in relation to this principle? It's also a great way to start a conversation among people unfamiliar with Emergent Learning in a way that helps them reflect on how their culture affects their ability to learn together.

EL principles work together to create the conditions for learning. They help us understand where learning cultures are strong and where to focus improvement. You may be doing a lot of things well, but if you don't have diverse perspectives in the room — and fail to create a safe space for those who are gathered to create, decide, and act — you may find that you're just reinforcing the status quo. If you have a strong line of sight and lots of experimentation, but don't do anything to return learning to the system, emergence isn't likely to happen. To create the conditions, we need to be asking, "What principles do we need to add to the mix?"

Several chapter authors suggested that evoking and keeping the line of sight in front of us at all times is an essential condition for emergence. Without that line of sight, learning activities are rudderless. And, when line of sight intersects with inviting diverse voices to the table and freedom to experiment, it invites a whole, diverse community to actively bring all of its creative energy to collaborate toward an outcome. "Enlisting diverse voices when trying to determine what success would look like helps to clarify the collective vision of our work," says Janine Saunders. "It helps a diverse group coalesce around a common goal. The line from our current state to our desired outcome is sharpened when we all draw the line together," she says. And, Janine continues, everyone "has greater clarity on what they can contribute to successful outcomes [as they] co-create the path to getting there." In Chapter 1, Parv Santhosh-Kumar (2017) and Jessica Mindnich (2020) add that diverse voices means "everyone has agency and expertise to offer wisdom around strengthening the line of sight."

> The line from our current state to our desired outcome is sharpened when we all draw the line together.

Furthermore, Rebecca Ochtera and Brittney Gaspari observe that when making thinking visible becomes part of the culture of an organization, it can create an environment for testing and experimenting. They point out that "When a team is okay with multiple 'best guesses' for how to get to success, then testing out those best guesses with a spirit of curiosity and creativity is a much more likely next step." Janine Saunders adds that inviting diverse voices into experimentation "creates the conditions for asking and exploring certain questions and ideas that may not be taken into account otherwise."

Another important condition of emergence is stewarding learning through time. As Tanya Beer (2013) observed in an interview with Sarah Smith, "Accumulating shared wisdom is only possible if you're stewarding in a way that builds and refines understanding about what it takes to make change happen." One of the things that makes stewarding learning through time effective is a strong line of sight. Gladys Hairston (2020) adds, "Stewarding learning is virtually impossible without a strong line of sight. The lessons learned will be all over the place." As Sarah describes in Chapter 8, a strong line of sight serves as a map for the process of stewarding — identifying which questions to focus on and which ones to let go of.

Sarah Smith adds that inviting diverse voices makes the intersection between stewarding learning and line of sight even richer because, together, they create space to consider new ideas and contributions regardless of where they come from or when they emerge. She notes that if this principle is absent, stewarding learning through time will perpetuate existing inequities — a condition we do *not* want to cultivate. Tanya Beer reflected in the interview with Sarah Smith, "The steward is often in the position of figuring out what information and perspectives to bring to the table to support deep learning. Diverse perspectives help break teams out of cognitive traps such as confirmation bias and groupthink."

Diverse perspectives help break teams out of cognitive traps such as confirmation bias and groupthink.

Connection

If the context is our garden plot, and conditions are how we nurture the soil, then connection is the ecosystem of relationships that grow over time. It's where we see the spirit of *ubuntu* in full bloom. At its essence, Emergent Learning principles make it possible for new connections to manifest: among people, their ideas, their experiences, their histories, and the opportunities that lie ahead. So how *do* we make those connections?

Trusting relationships

The first part of the answer sits in how EL principles make it possible for people and groups to build trusting relationships with one another.

Making thinking visible, as Janine Saunders says, "externalizes your internal insights, including the assumptions and biases undergirding your ideas," which, when done with respect and honored by the group, creates a sense of safety and connection because we all are shaped by our experiences and what we learn from them. Laila Bell (2019) and Andrea Anderson (2018) note that "when individuals in a learning process openly share their thoughts, they allow others to understand the 'what' and 'why' of their ideas and contribute to the collective understanding and wisdom of the group." They add that it isn't just about individuals being vulnerable. "To build transparent, trusting relationships in the communities where we work," Laila and Andrea say, "organizations must also make the rationale for their strategies and approaches visible and testable for staff, partners, and beneficiaries."

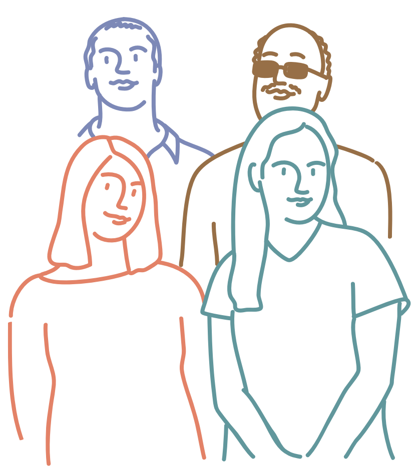
Jeffrey Poirier (2019) and Kimberly Spring (2021) note how returning learning to the system also creates the conditions for connections to emerge because it calls for convening and re-convening groups to make sense of what is happening and co-develop new hypotheses and experiments as part of the learning process. As part of that process, a sense of individual and group agency emerges that reinforces those developing relationships. "Done well," Jeffrey and Kimberly say, "learning engages a diverse group of voices to both increase each participant's knowledge and capacity and build on the group's collective experiences and wisdom, fostering greater ownership of what the group is learning."

Connecting the "in-between"

The second part of the answer lies in the "in-between": how EL principles help us make explicit and deeply explore the connections between *ideas* and how those ideas connect to the *real-life work* happening on the ground.

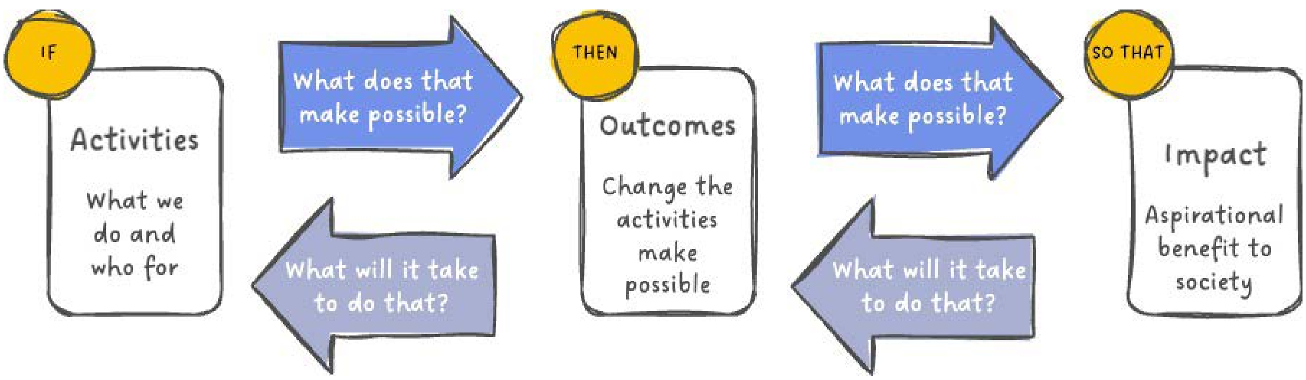
The strong relationship among asking powerful questions and making thinking visible helps us explore connections between ideas, and we often see these two principles working together. As EL practitioners listen to conversations, we often ask, "What does that make possible?" or "What will it take to do that?" as we consider everyone's experiences and together translate those experiences into our most powerful and shared thinking about what it will take to succeed.

A good example of this is in a theory of change, which makes our thinking visible by expressing and focusing on learning about the hypotheses that are implicit in between the boxes of inputs, outputs, and short and long-term outcomes. Deborah Bae (2020), Managing Director for Robert Wood Johnson Foundation's Leadership for Better Health program, shares that in conversations about her work, "I said that EL is the space between the boxes. I want to put as much space between the boxes as in the boxes themselves… I want to be able to double click and see the hypotheses."



Making space in between the boxes

One way I've made the implicit thinking behind the little arrows visible in my own work is to include questions that help reveal that in-between. As we talk about the relationship between our activities, outcomes, and ultimate vision, I've found asking our team to articulate answers to "What does that make possible?" and "What will it take to do that?" brings clarity to our thinking. More concretely: What do the activities we undertake make possible? What do short term outcomes make possible for longer-term impact? What do all of these make possible for society? Conversely, if we start with our vision: What will it take to accomplish it? What lives between the vision and activities? Answering these questions is about helping people make their thinking visible by explicitly expressing their hypotheses. Here's a simplified example of what this has looked like:



Once our thinking is visible, we still have to find a way to plug our thinking in with the real-life work on the ground in a way that keeps the work moving forward. Here, we fully embrace work at the center and recalibrate our powerful questions to help us understand what came of our experiments: What really happened? What was true and not true about our hypothesis? We double-down on maximizing freedom to experiment — What will we try next? — and steward learning through time as we loop in new hypotheses, experiments, and findings over and over again.

As Carla Ganiel (2022), Learning and Evaluation Officer for the Max and Marian Farash Charitable Foundation, mentioned in the EL Integration and Impact Learning Inquiry,[3] this is what "helps bridge the disconnect between what people put on paper and their thinking about what it will take to really accomplish their goals."

> [Making thinking visible is what] helps bridge the disconnect between what people put on paper and their thinking about what it will take to really accomplish their goals.

Carla Ganiel

Emergence, by definition, is the potential for something to become. The principles of EL — by helping us understand the context, create the conditions for learning, foster relationships between one another, and make deeper connections between our thinking and real work on the ground — make it possible for social change to emerge.

Relationship with other approaches to social change

The social sector employs a lot of frameworks and approaches — sometimes so many that people who are just trying to do good work become 'allergic' to adding something new…including Emergent Learning.

One of the reasons (in my experience) we find adoption of Emergent Learning tricky is because EL isn't a standardized process that leads us quickly to answers. There is no A+B=C formula. In EL, *learning* is the product (Darling, 2022). And that learning happens in the spaces between the elements of a theory of change, the steps outlined in a framework, or the process of evaluation. "It is exactly *because* Emergent Learning focuses on the interstitial spaces more than on what can get captured on paper that it 'plays well with others,'" writes Marilyn Darling in her blog in 2022. If we want to learn, then we have to keep focusing on that interstitial space.

> Learning happens in the spaces between the elements of a theory of change, the steps outlined in a framework, or the process of evaluation.

This is particularly relevant as we encounter other social sector approaches — ones that already exist and continue to evolve, like collective impact and systems thinking — and ones that are newly emerging, like the Equitable Evaluation Framework™ and Trust-Based Philanthropy.® Emergent Learning works in the spaces between any of these models, and is complementary and reinforcing to them. These frameworks can be incredibly helpful in particular contexts to help us ask new questions and see things from different perspectives. It is important, though, to keep in mind that a framework's purpose is to help us achieve our work goals. It can be easy to slip into the mistake of measuring our success against the framework and lose sight of our larger goals. EL helps us remember to always keep the work at the center.

3 The EL Integration and Impact Learning Inquiry is a multi-year community learning project to explore how EL becomes integrated into practitioners' work and what impact it has on their results.

Exploring Trust-Based Philanthropy® with powerful questions

When applied within the context of Trust-Based Philanthropy (TBP), EL has helped teams think through what it will take to ameliorate power imbalances. For example, in a case study, Brittney Gaspari (2020) described how Emergent Learning helped The Winston-Salem Foundation learn their way through implementing TBP. As the foundation sought to deepen its connections to grantee partners in their focus areas, staff began to explore what it would take to keep the grantees' work at the center of the grant application process, rather than building something that served only the foundation's needs for information. The foundation found that asking the question, "What will make us successful this time?" in conversations with grantees was a powerful way to shift the power dynamics between the funder and grantees from one in which the "grantee was expected to propose outcomes and then be solely responsible for their completion" (Gaspari, 2022) to one in which the foundation named their role in making the project successful. Brittney noted that, "In this way, we lived into the practice of 'doing the homework' from Trust-Based Philanthropy" (Gaspari, 2022).

EL principles help us ask powerful questions of these approaches, just like we would of any other hypothesis or idea. For example: What does it look like when evaluation is implemented in service of equity? What does a common agenda make possible, and what does it really take to accomplish our collective goal? What are we learning about how mutual accountability between grantmakers and grantees helps both accomplish their missions? Questions like these help situate the framework in the context of the goals and work of an initiative and help groups nurture conditions for lasting social change. "This makes it possible for a group of partners working in a complex environment to keep moving toward their shared goals, regardless of what gets thrown at them," says Marilyn Darling.

At the end of the day, Emergent Learning helps bring other frameworks and practice into focus by connecting decisions and actions to the thinking and reflection underlying them, which is really the essence of learning.

Here's an analogy that helps me think about how Emergent Learning works: One thing I love about applying EL principles is that they often spark breakthroughs in my own work. When I am feeling that complexity is a vacuum rather than a space for sparking new ideas, I think, "What principle can I bring in here that will nudge us toward a new idea or solution?" While I don't claim to be a scientist, what little I know about atoms is that they are mostly empty space. And it's because of that empty space that they hold a lot of power. When outside forces are introduced to the space where the electrons are whizzing around, it makes electrons jump from one atom to another, which creates energy. In Emergent Learning, the principles are "the force" we introduce to the interstitial space with the power to push ideas (or mindsets, assumptions, experiences, knowledge, and/or data) out of their comfy orbits, sparking something new. It's how when we're doing EL, things sometimes feel like they come out of thin air. That's when we know it's working.

Conclusion

Ubuntu. I am because we are. Our lives intersect. Our work intersects. Our worlds intersects. When our paths cross and we can make meaning together, then we are better prepared for deeper understanding and connection. In the spirit of *ubuntu*, emergence brings about connections that let us be seen and heard, and trains us to see and hear others. It prepares us for the interconnected nature of learning together, of gently nudging one another out of our comfortable thinking and into deep understanding. It's how we serve and solve in the context of complex issues, relationships, and histories. That's what the principles of Emergent Learning make possible. That is the potential that exists because *we are*.

Acknowledgements

In early drafts of the previous chapters, most authors took time to draw discrete intersections between their chapter's principle and other EL principles. This was immensely helpful in the development of this chapter. I've done my best to bring in the authors' thinking on these intersections whenever possible using direct quotes, and am grateful to each of them for letting me play with their thinking en route to this chapter. Thanks also Brittney Gaspari and Jim Stiles, who were kind enough to review this chapter on an accelerated schedule as we sprinted toward final publication.

To Andrea Anderson and Vanessa Samuelson — thank you for introducing me to Emergent Learning. To the wider Emergent Learning Community — who I continually learn from, laugh with, am challenged by, and utterly adore — you are my people.

And to Marilyn Darling — mentor, cheerleader, ally, dissenter, thought-partner, co-editor, and gentle nudger on this emergent journey — thank you.

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Conculsion

By Marilyn Darling

Emergence is about a whole that is greater than the sum of its parts. For this guide, that means that, together, we created something that is a richer expression as a whole because it was written by a community — far greater than it could ever have been if any one person attempted to write it, using only their own experience to inform the narrative. The perspectives, voices, and stories of over 65 practitioners helped to shape and enrich the messages we shared here.

We hope this guide helps you to discover that Emergent Learning is more than just a set of tools to solve problems, create plans on paper, or facilitate meetings. As we described in the introduction, creating a culture where learning happens organically is not something that we can just plan and implement. It is more about a way of being in relation to our work.

> Creating a culture where learning happens organically is not something that we can just plan and implement. It is more about a way of being in relation to our work.

In Chapter 9, Jeffrey Poirier and Kimberly Spring described the social change challenge as being like many blindfolded people trying not just to describe an elephant, but to *move* it. At the end of the day, Emergent Learning is all about people — people bringing together their experience and wisdom from many different contexts to tackle a common challenge or an aspirational goal. The EL Community is a true community of *practice* where people in many different roles, types of organizations, and geographies gather on a regular basis to "rub together" their stories of practice in a way that deepens our collective understanding and ability to make change happen wherever we are.

The principles described here emerged from that collective practice and continue to inform our practice as well. Jim Stiles, former Fourth Quadrant partner and now co-director of the EL Community Project, describes it as "a virtuous cycle." Of the EL Community, he observed, "In all of my 40 years of practice, I've only been in one other professional group where people were as generous with their time to people they don't know. There is just this thirst among people who've been part of the community to give to others, which is great."

> There is just this thirst among people who've been part of the community to give to others.

Jim Stiles

When she was first exposed to Emergent Learning, Jillaine Smith, one of the founders of Fourth Quadrant Partners, was a skeptic. "I had been exposed to so many methodologies for organizational effectiveness or improvement. Why would this be any different? But I started to see how much EL actually applied to people's real work and the difference it was making." Jillaine reflected, "That's what changed my mind. It's a philosophy; a way of thinking that actually makes a difference. I use it everywhere — not just with clients, but with my family and my friends. It's just the way I live my life now."

> [Emergent Learning is] a philosophy; a way of thinking that actually makes a difference.

Jillaine Smith

What are these principles calling us to do?

It is popular to call for "learning from failure." In Emergent Learning, the real call is to learn from *all* of our experience — successes, disappointments, triumphs, and defeats. This is not a technical challenge. It is a call to create a culture where learning is not just something we say we do, or something we do when we think of it, but something we do organically because we understand how it contributes to achieving the goals to which we aspire — "just how we do our work here." In Chapter 8, Sarah Smith talked about stewarding learning through time and observed that this principle "starts to shift a group's culture by helping to transform learning from one-off, disjointed activities into a habit."

Emergent Learning is something we seed and nurture. It is about learning to notice what works and what doesn't in our unique organizational cultures and the larger ecosystems in which we work. It takes time and practice. It is like strengthening a muscle. And, as Parv Santhosh-Kumar and Jessica Mindnich described in Chapter 1, it takes curiosity and humility. We talk about expertise in equal measure, but EL is also about beginner-ship in equal measure.

That is why EL practitioners focus not only on the practices but on the principles of Emergent Learning, which help us create fertile ground where learning can take root. EL is not a call for being trusting, vulnerable, and authentic. EL is a call for creating the conditions where those qualities can arise naturally, not by mandate.

Heidi Sparkes Guber, a co-founder of Fourth Quadrant Partners, observed that, "doing this practice ourselves with each other is what actually allows the field to emerge through the people we've touched. It conditions the contexts around us. Like a permaculture garden, EL actually begins to influence the space around it, without our consciously planning it."

> Like a permaculture garden, EL actually begins to influence the space around it, without our consciously planning it.

In closing...what you can do

When Emergent Learning was just a kernel of an idea, I had no idea what would emerge and what it would make possible. The journey the EL Community has been on is the reward, and the road most definitely continues to emerge as we walk it.

> EL is not a call for being trusting, vulnerable and authentic. EL is a call for creating the conditions where those qualities can arise naturally, not by mandate.

Emergent Learning's nine principles are themselves emergent. Like the Golden Rule, they are intended to help us think about what to do in any given situation. But they are not set in stone. As Heidi reminds us, "We have a responsibility to continue to revisit and evolve them. Because as each of those generations of practice happens, we're going to have deeper and deeper insights. And that's our commitment."

This guide represents a moment in time for the EL Community. Emergent Learning is being discovered by, and used in, wider and more diverse groups and settings. As this community continues to grow and evolve, we will return to the conversation this guide represents. In the meantime, we want to hear your questions, reflections, reactions, and stories! Please fill in this form (as often as you would like) with your ideas for the next edition of this *Guide to the Principles of Emergent Learning*.

If you are new to Emergent Learning, you can learn more at emergentlearning.org. It includes a list of practitioners who can help your organization explore Emergent Learning. You can also follow the Emergent Learning Community Project on LinkedIn.

Please join us in our journey!

It is the vibrancy of the Emergent Learning Community that made this Guide possible.

The Emergent Learning Community Project is a fiscally sponsored project of Global Philanthropy Partnership. You can support the community and its activities through individual donations and philanthropic grants.

Contact info@emergentlearning.org if you're interested in learning more about providing financial support to the Emergent Learning Community Project.

Authors and Contributors

AUTHORS

Introduction

Marilyn Darling is Co-Director of the Emergent Learning Community Project. Marilyn and her colleagues developed the principles and practices of Emergent Learning. She uses Emergent Learning to help change agents working in the social sector to strengthen their strategic thinking and real-time, collaborative learning, in service of achieving the results to which they aspire. Marilyn helps funders and their partners think about how to expand the agency of whole ecosystems of people working to solve complex problems. She and her co-directors support a growing community of Emergent Learning practitioners. Marilyn continues to conduct research to help deepen the field's understanding of these principles and practices in support of complex social, economic and environmental change. She is a founding member of the Society for Organizational Learning (SoL).

Chapter 1

Parvathi (Parv) Santhosh-Kumar, MPP (2017) is a future-oriented and collaborative systems change leader working to measurably improve well-being outcomes of children and families furthest from opportunity. As Vice President of Community Impact at America's Promise Alliance, a practitioners' community for youth-supporting organizations, she co-leads programming to build the capacity of leaders to address their most pressing organizational challenges and work together on collective action to advance better and more equitable outcomes. Parv is an advanced Results Count™ leadership practitioner and a certified advanced practitioner in emergent learning.

Jessica Mindnich, PhD, MA (2020) is the Senior Director of Strategic Learning & Evaluation at the Mellon Foundation where she works with the leadership and program teams to seed emergent learning and weave evaluative thinking throughout the Foundation's work to help advance a more just and multivocal democracy. Prior to joining Mellon, Jessica led the evaluation, learning, and impact stories department for the Ewing Marion Kauffman Foundation, created the evaluation department at the San Francisco Foundation, and led the research department of Children Now, a state-based research and advocacy organization. Jessica received a PhD and a Master of Arts in Human Development and Education and a Bachelor of Arts in psychology from the University of California, Berkeley.

Chapter 2

Rebecca Ochtera, PhD, MPH (2019) is currently the Director of Evaluation and Learning at Caring for Denver Foundation in Denver, Colorado. She has over 20 years of experience supporting nonprofits, healthcare systems, and philanthropic organizations in using evaluation and learning as critical tools for program development, strategic planning, and decision-making.

Brittney Gaspari, MPA (2020) serves as an ELCP fellow and is currently working to develop and pilot an Emergent Learning program for nonprofit leaders. Brittney has 20 years of experience in philanthropy, most recently with The Winston-Salem Foundation, a community foundation located in North Carolina. In 2017, Brittney led the development of the foundation's emergent strategy focused on advancing equity in education and building an inclusive economy, utilizing trust-based approaches in the work. In 2019, Brittney launched the foundation's Inclusive Economy Portfolio, a mission-aligned investment program aligned with the foundation's racial equity work. Her interests are incorporating emergent learning principles and practices to implement trust-based approaches at foundations.

Chapter 3

Alison Gold (2021) is passionate about sharing her unique combination of skills and experiences as an anthropologist, systems change-maker, community-weaver, emergent learner and strategist, and facilitator with organizations and multi-sector collaborations seeking to transform systems and institutions to create a more just, positive, and equitable world. This is why she founded Optimistic Anthropology LLC in 2017. Learn more about Alison and her work at www.optimisticanthro.com.

Chapter 4

Lauren Gase, PhD, MPH (2020) is a Senior Researcher/Project Director at the Colorado Evaluation and Action Lab at the University of Denver, working with government and community partners to unlock data-informed solutions to the state's most pressing social problems. She holds a PhD in Health Policy from UCLA and a Master of Public Health from Emory University.

Chapter 5

Jillaine Smith is Co-Director of the Emergent Learning Community Project. Jillaine coaches teams and leaders to use EL for everything from strategy development to day-to-day operations. Jillaine's 25+ years of experience in the nonprofit sector brings an appreciation for the power dynamics and other complexities of learning between grantmaker and grantee organizations. She is an advocate for "keeping the work at the center" of any learning-related activity. Jillaine co-designed the Emergent Learning Certification Program and is co-author of three articles about Emergent Learning in Foundation Review.

Leslie Foster, MPA (2017) is senior manager at Mathematica, a public policy research firm that partners with government, philanthropic, and commercial clients to bring evidence to bear on society's most pressing challenges. She has held almost every job in qualitative and quantitative research projects of all sizes. She is passionate about creating a positive client experience, achieving quality in all its forms, and fostering the development of emerging researchers and leaders to promote diversity, equity, and inclusion.

Chapter 6

Janine Saunders, EdD (2020) joined The California Endowment (TCE) as its Director of Learning and Evaluation in October 2017. In this role, she supports external research and evaluation activities along with organizational learning and strategy development across TCE departments. She helps ensure that TCE's learning and evaluation agenda incorporates comprehensive opportunities to learn from the foundation's work; high quality evaluation design and implementation; effective communication of TCE's impact, influence and learnings; a focus on outcomes and results; and a collaborative commitment to continuous learning and improvement throughout the organization and between TCE and its grantees. She has deep expertise in participatory evaluation, community-oriented methods, and a growing expertise in equitable evaluation.

Chapter 7

Laila Bell, MPA (2019) is Vice President of Learning & Impact at the Skillman Foundation where she facilitates programmatic efforts to use data, evidence, and experience to inform investments in the power of Detroit youth to design and influence change and drive greater impact. Laila's career has focused on advancing the well-being of children and youth, first as the director of research and data at a statewide child advocacy organization, NC Child, before entering philanthropy as an evaluation and learning leader with roles at The Duke Endowment and Ewing Marion Kauffman Foundation. A native Southerner, Laila enjoys expressing her creativity through pottery, dance, and as a live music enthusiast.

Andrea Anderson, PhD (2018) serves as Chief Knowledge Officer of United Way of Greater Philadelphia and Southern New Jersey (UWGPSNJ) where she develops, implements, and leads the programs and activities of the Knowledge Center, the evidence and learning hub for UWGPSNJ's regional collaborations. During her 28-year career, Andrea has conducted program evaluation, policy analysis, and applied research for nongovernmental organizations, foundations, and civic leadership groups, both domestically and internationally. A native of Baltimore, Andrea is an avid (if not slightly obsessed) football fan. During the off-season she loves spending her time at farmers markets, art exhibits, bookstores, or in relentless pursuit of the perfect beach sunset photo.

Chapter 8

Sarah M. Smith, MSW, MPH (2019) is Director of Learning and Evaluation at the Blue Cross and Blue Shield of North Carolina Foundation. In this role, she is responsible for nurturing a culture of learning and for positioning evaluation as a tool for social change to advance the organization's vision, mission, and values. Sarah received her bachelor's degree in music and psychology from the University of Washington in Seattle and both a Master of Social Work and Master of Public Health from Washington University in St. Louis.

Chapter 9

Jeffrey Poirier, PhD (2019) is an associate director in the Center for Economic Opportunity at the Annie E. Casey Foundation, where he supports efforts to advance strategies, investments, and lessons that promote educational and economic opportunity for young people and families. He is also supporting development and implementation of the team's learning agenda and practices. He was previously a senior associate on the foundation's research and evaluation team, supporting equity-focused research and evaluation investments and related learning.

Kimberly Spring, PhD (2021) is the Director of Research and Evaluation at the Annie E. Casey Foundation, where she leads efforts to develop evidence and data for programs, policies, and practices that support the well-being of children, youth, and young adults. A core part of her team's work involves investment in approaches that advance culturally responsive and equity-focused research and evaluation practices. She has led research and evaluation projects in the areas of child and youth development, family economic success, economic inclusion, community change, social and organizational networks and civil and political engagement. Prior to joining Casey in 2013, she worked as a research and policy analyst at the Corporation for National and Community Service. Kimberly received her doctorate in sociology from the New School for Social Research.

Chapter 10

Avery Eenigenburg, MSA (2020) is passionate about learning, evaluation, and strategy in the context of international development and NGOs, and building the systems and processes to help organizations around the world solve wicked problems facing children and families. She loves holding space where problem-solvers and world-changers embrace curiosity, connect with one another, and together imagine what's possible. Avery has more than 15 years of experience in nonprofits and philanthropy. She earned a Master of Science in Administration, Philanthropy and Fundraising from Central Michigan University. In her day job, she serves as Monitoring & Evaluation Specialist for Destiny Rescue International. Avery lives in Michigan with her family and a motley assortment of pets, books, and antique tractors.

CONTRIBUTORS

Marisa Allen
ResultsLab
2016

Ammara Ansari
Detroit Action
2020

Deborah Bae
Robert Wood Johnson Foundation
2020

Tanya Beer
Independent Consultant
2013

Kecia Bertermann
Luminate
2020

Rachel Bland
Robert Wood Johnson Foundation
2020

Tony Bradburn
Township High School District 214

Omar Carrillo Tinajero
Center for Community Investment
2019

Allison Catalano
Revalue Nature
2022

Sonia Caus Gleason
Sonia Caus Gleason Consulting
2018

Yen Chau
NineFold
2018

Raj Chawla
The OCL Group
2020

Karuna Chibber
David and Lucile Packard Foundation
2022

Tracy Costigan
Robert Wood Johnson Foundation
2018

Katie Grace Deane
Lincoln Institute of Land Policy
2018

Cheryl Francisconi
Institute of International Education
2019

CONTRIBUTORS (continued)

Rex Fyles
Gender at Work
2018

Carla Ganiel
Max and Marian Farash Charitable Foundation
2022

Layla Garms
The Winston-Salem Foundation
2021

Anne Gienapp
King County Metro
2014

Felisa Gonzales
The Colorado Health Foundation
2018

Ray Gordezky
Threshold Associates
2015

Jennifer Gross
Annie E. Casey Foundation

Alison Grubbs
New Pluralists
2019

Heidi Sparkes Guber
Co-Founder Emeritus, Fourth Quadrant Partners, LLC

Gladys Hairston
John Rex Endowment
2020

Milano Harden
The Genius Group/ TGG
2019

De'Amon Harges
The Learning Tree

Taylor Hayes
The Winston-Salem Foundation
2021

Allison Holmes
Annie E. Casey Foundation
2021

Joshua Joseph
Pew Charitable Trust
2021

madeleine kennedy-macfoy
Education International
2021

CONTRIBUTORS (continued)

Christina Koukkos
Wellville
2019

Catherine Lester
Annie E. Casey
Foundation

Robin McKinney
CASH Campaign of
Maryland
2015

Veena Pankaj
Eval4Learning
2019

Nancy Pole
Co.spire Consulting
2019

Natalie Portman-Marsh
NPM Consulting, LLC
2014

Kelci Price
The Colorado Health
Foundation
2015

Russell Ramsey
Houston Endowment
2019

Chera Reid
Center for Evaluation
Innovation
2016

Vanessa Samuelson
The McGregor Fund
2019

Miles Sandler
Ewing Marion
Kauffman Foundation

Bill Shepardson
Annie E. Casey
Foundation

Beatriz Solis
The Califonia
Endowment
(In Memory)

Deepti Sood
TCC Group
2021

James Stiles
Co-Director, Emergent
Learning Community
Project
2014

River Sturdivant
Arthur Dean Family
Foundation
2022

CONTRIBUTORS (continued)

Chris Tebben
Sapient Solutions LLC
2020

Stephanie Teleki
California Health Care Foundation
2020

Punita Thurman
Skillman Foundation
2019

Marian Urquilla
Independent Consultant
2013

Rees Warne
Bezos Earth Fund
2020

Sandra Wegmann
Wegmann & Associates
2016

Terry Whitfield
The Skillman Foundation
2021

Devon Winey
Mt. Auburn Associates
2017

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