

HAND IN HAND -- ORGANIZATIONAL LEARNING AND ORGANIZATIONAL DEVELOPMENT FOR SOCIAL CHANGE:

FINAL REPORT TO FUNDERS ON THE NORTH AMERICAN LEARNING GROUP ON ORGANIZATIONAL LEARNING AND DEVELOPMENT

Introduction:

Two years ago, the Ford Foundation, the Marguerite Casey Foundation and the French American Charitable Trust contributed a total of \$105,000 to support creation of a Learning Community to explore assessment and organizational learning strategies for strengthening community organizing and social change efforts in North America. This initiative grew out of an earlier international conference at Gray Rocks in Quebec which was funded by the Ford Foundation. It is linked to a parallel effort by the Institute of Development Studies at the University of Sussex which focuses on assessment of social change in Asia, Africa and Latin America.

This report describes and analyzes our experience in launching the North American Learning Community. In particular, it describes how the initial conveners refined the goals for the Learning Group, identified and selected people to invite to join the Group, and then launched a highly participatory process in which there was heavy investment by all the participants and a remarkably successful sharing of leadership from the beginning.

The report provides detailed examples of how the participants apply their unique combination of assessment and organizational learning skills and their organizational development expertise to strengthen grassroots groups which are pursuing community change and social justice. It concludes with the Learning Community's plans for continuing to come together for mutual learning, with the goal of gradually growing to reach increasing numbers of people who also could benefit from opportunities to learn from and collaborate with colleagues from whom they are now isolated. The Community will meet again in January, 2007 to complete these plans and begin extending its reach. Learning Group members will cover their own travel and other expenses as one step toward creating a sustainable, ongoing learning process which we hope will grow and be replicated in two or more regions of the country.

Background:

The North American Learning Community emerged from the Gray Rocks conference which was held in fall of 2003 near Montreal. At that conference, community organizers, social change activists, evaluators and nonprofit "learning partners" reached broad consensus on the need for action to address the "supply problem". **There was strong agreement on the need to take steps to increase the number of people with skills in helping social change organizations strengthen their ongoing processes for**

assessing and reflecting on their progress and applying what they learn to improve their strategies, operations and effectiveness.

Applying this consensus, the North American planning team decided to make the “supply problem” the focal point for our work. We identified two distinct potential sources of the talent which is needed –

1. people trained as evaluators who use participatory approaches and understand social change, the leaders and organizations that lead it, and the unique issues they face; and
2. people and institutions which provide organizational development assistance to grassroots groups, helping them strengthen their systems of feedback, assessment, organizational learning, and planning so they can increase their effectiveness and impact.

We then decided to concentrate our full attention on the second source of talent. **We created a Learning Community of organizational development practitioners who give serious attention to assessment and organizational learning as they help groups increase their capacity, power and influence. We made this choice fully aware that this talent pool is usually overlooked in discussions of evaluation of grassroots social change efforts.** In fact, it is precisely for that reason that we chose to focus on this source of talent which community groups have found to be of great value, and which has succeeded in overcoming many of the obstacles which block conventional and even participatory outside evaluations.

We also chose this focus aware of the great shortage of such people in North America. In the US and Canada most organizational development specialists center their practice on corporate and major nonprofit institutions, and very few institutions or individuals provide organizational development help to grassroots groups.

Our first step was to identify a pool of organizational development practitioners who focus on grassroots social change organizations (ODSC practitioners). We therefore reached out to people and networks who could help us identify a large pool of these practitioners, and eventually invited over 45 people to consider joining the Learning Community we were forming. The letter of invitation included an application form which delved into the applicants’ backgrounds in working with grassroots groups, their interest in creating an ongoing peer learning group, and the issues they would like to explore with others. After phone interviews the five-person planning group selected a cross-section of people with varied backgrounds and levels of experience, but with an emphasis on people who are relatively new to the work, people of color, and people who are isolated from peers.

The resulting fifteen-person Learning Community is quite extraordinary. The participants range in age from 24 to 65. Most are people of color, with African Americans being the largest racial group. The group includes the author of two books on organizational development, professors of anthropology, social work, planning and

political science, a 26 year old who provides technical assistance on community organizing and policy campaigns as well as OD, a graduate student who has worked with grassroots groups in India, a nationally known adult educator, and people who consult for more than a dozen foundations around the country.¹

All the participants are committed to social justice work and see their careers in organizational learning and development as key to bringing about social change.

Facing the reality of tight resources, they have found different ways of sustaining this work. Only one has a full-time job as an ODSC specialist working for a nonprofit technical assistance group, coalition, or other support organization – a sign of how difficult it is to raise funding for such work. Most work free-lance, consulting for foundations and larger clients to earn sufficient income to cross-subsidize their work with grassroots groups. Some are based in universities, providing OD technical assistance while teaching or researching community issues, and using their university salaries to help finance their social change work.

Many participants started working on organizational development and learning issues because they found their work with grassroots groups on specific research, issues or programs was blocked by organizational issues. They soon realized that the groups could not overcome those difficulties without advice and assistance. Although a few members of the Learning Group have extensive formal educations in organizational development and/or evaluation, most have learned organizational learning and OD skills through experience.

Everyone who participated in the Learning Community was attracted because of their strong feelings of isolation from colleagues. They were anxious to have new opportunities to learn and compare strategies, techniques and tools for helping grassroots groups reflect and learn, build their power and capacity, and achieve significant community and social change. Many also wanted to widen their circle of potential collaborators for future organizational learning and development projects.

We followed a highly participatory process in developing the Learning Community. This began with one-to-one interviews with all the participants. That enabled us to organize the first meeting around their experience, what they had to share with each other, and what most strongly motivated them to join the Learning Group and devote so much time to this process. There was a handsome payoff from these prior consultations. Also critical were highly skilled and participatory facilitation, a relaxed retreat setting, and a strong investment of agenda time in helping people get to know each other. Participants rapidly developed an unusually strong sense of affinity and sharing during the first meeting.

We built on this strong beginning by sharing leadership from the early stages. For example, the second meeting was planned with two new participants joining three from the initial planning group to develop the agenda and share lead facilitation

¹ See Appendix A for brief bios on the members of the Learning Community.

roles. This leadership-sharing broadened further when others assumed responsibility for planning the third meeting, helping with logistics, facilitation and note-taking.

This open approach led to a remarkable level of camaraderie and personal investment among all the members. As a result, at the end of the first meeting, when the group brainstormed topics they would like to discuss with each other, participants identified thirty-one different subjects. Significantly, many of these topics are deeply sensitive, including serious ethical and philosophical issues the participants face on the ground, and equally personal issues of maintaining morale and perspective, especially when they face tough organizational situations which shake their confidence in their own skills and experience.

Over the three meetings, the Learning Community used a variety of techniques for organizing its discussions. These included large and small group discussions, case studies, problem-solving sessions, and “open space” which maximized opportunities for participants to initiate sessions on issues which concerned them or strategies they wished to share. Throughout the series of meetings, we continued to commit time to deepening our knowledge of each other and each other’s work. This strengthened bonding within the group. It also enabled us to learn more about what we shared in common, our different backgrounds, the different approaches we use, the challenges we face, and what new ideas people are exploring.

Most of the discussion concentrated on highly practical, concrete topics, especially issues of methodology, tools and techniques for addressing particular situations. The meeting notes are replete with examples of the different strategies and techniques which these ODSC practitioners have used. **Viewed as a whole the discussions were a rich mix of theory and practice, of vision and experience. It is this mix which was invaluable to the participants and stimulated them to commit time to and share leadership in the Learning Community.**

As the first meeting was concluding, it was already abundantly clear that the group wanted to continue meeting and learning from each other. Among the indices of their interest were their enthusiasm in identifying items they wanted to discuss, the extent to which volunteers stepped forward into leadership positions, and the time and financial sacrifices that people were making so they could participate.

We moved quickly to harness this enthusiasm, adjusting the agenda so we could begin looking ahead to how the group might evolve over time. We returned to this topic during the two subsequent meetings, fleshing out plans for continuing working and learning from each other.

After the first meeting the conveners decided to reallocate the limited budget and stretch the funds so the group could meet a third time. We gave this top priority because the participants wanted the Learning Community to continue over the long-run and our experience demonstrated that three meetings are far more likely than two to create lasting momentum. In reallocating the budget, the team

leaders agreed to reduce their compensation so we could cover the additional travel and accommodation costs for a third meeting. We also sought and received a supplementary grant of \$10,000 from FACT to help cover these expenses.

The decision to hold a third meeting paid off in three ways. First, it gave the group sufficient time together to respond to people's diverse interests and concerns and test different ways of organizing discussion. Second, having a third meeting enabled the group to keep refining its future plans, building on the first meeting's discussion to develop an increasingly robust plan for the future.

Third, our success in creating strong momentum was demonstrated when everyone agreed without hesitation to meet again in January 2007. There was quick consensus among all participants that the Learning Community was so valuable that they would use their own funds to pay transportation and other costs. What makes this especially remarkable is that most participants are free-lance consultants and academics who also forego income during the time they commit to these meetings. Others are giving up vacation days for this opportunity. These indicators of unusual success are in notable contrast to many initiatives which are dependent upon heavy continuing subsidy and die when funding runs out.

This sense of shared ownership with everyone pitching in and helping with planning, logistics, facilitation, note-taking and overall leadership greatly enhances our chances of sustaining and building upon this initiative. Our goal is to reach and connect increasing numbers of people who integrate assessment and organizational learning assistance into their organizational development work. Our experience convinced us that learning groups like ours can significantly strengthen growing numbers of OD/OL practitioners in their ability to help grassroots organizations work effectively for community and social change.

The Prerequisites for Effective Working Relationships on Assessment and Organizational Learning:

Trust and respect – all the participants agree that these are central to any outsider developing an effective working relationship with groups involved in community organizing and social change. Without trust a group will not confide about its weaknesses, concerns and crises; without mutual respect it will not see the person as a learning partner who can help it address those challenges and move forward with greater strength and success.

Since trust and respect are essential, it is extremely difficult – if not impossible – for a person or organization chosen by a funder to help a grassroots group candidly assess its work and impact and reflect forthrightly on what it can learn from its experience. Unless a person is invited in to help, the discussion will almost inevitably be too guarded and superficial to be useful either for the community organization or for funders and other outsiders.

Learning Group members compared various ways they had overcome these barriers and become trusted learning partners. Since calls for help from organizations simply wanting to learn are few and far between, the key is to start by responding to requests for help on what a group sees as an immediate priority. For example, helping with strategic planning, training a new Executive Director, or developing a fundraising plan can establish your credibility with an organization and open the door to opportunities to help the group enrich its assessment and organizational learning systems. **OD practitioners thus have entrees to social change organizations which even the most participatory of evaluators seldom – if ever – have.**

Participants shared many stories of how this strategy enabled them to begin demonstrating how greater attention to organizational learning can help groups solve problems and gain new perspective on their success and challenges. They have found this strategy works even for groups which are reluctant to devote time to assessing their work in a disciplined way. Most practitioners find strategic planning to be a particularly good hook for convincing groups to strengthen their internal processes of reflection and learning. Grassroots groups see planning's solid practical value, and the process of planning forces them to think back and reflect on how well they have done and what they have learned. Some OD specialists help groups do this on a continuous basis, perhaps visiting every two months to rev up their interest in learning and assessment, and then reviewing their experience every six months.

To summarize, **members of this Learning Community help community groups develop a three-fold repeating process, a “learning circle,” as they work for social change -- planning, action, and reflection, planning, action, and reflection. For them, therefore, any process of assessment and organizational learning goes hand in hand with organizational development. They go beyond helping groups learn from their experience: they also help them integrate learning systems into their daily operations so they have greater continuing capacity to assess and learn from their experience. And they help groups apply their learning to improve their issue campaigns and programs, strengthen themselves organizationally, and increase their impact.**

Techniques for Assessing Community Organizations:

Learning Community members have found that most community groups already have their own systems for assessing progress and applying what they learn to increase their success. Sometimes these systems are strong, explicit and well-understood. In other cases, the groups have far less formal systems and may not even think of themselves as engaged in “evaluation” and “learning”. For those groups, improved “knowledge management” is key: they need help “making sure they know what they know”. They need assistance surfacing the systems they are using, making them more explicit, and strengthening them.

Many organizations, especially those which are linked to national community organizing networks, have already incorporated a series of learning practices into their routine. In particular, they stress four regular disciplines for reflecting on their work –

- debriefing after each collective action, involving participants in reflecting how well they followed their plan, what worked and didn't, and what they learned;
- weekly written reports from each organizer on their outreach and organizing;
- frequent written reflections by each organizer on how well things have gone and what he/she has learned; and
- monitoring progress on the goals their membership set at its annual conventions and on the detailed plans they developed for particular issue campaigns.

Our experience is that this learning/planning requires an internal or external champion or it simply will not happen. The champion may be the Executive Director, another staff person, a Board committee, or an OL/OD specialist, organizing network, or skilled peer. Whoever it is, there must be someone to initiate the assessment process, staff it, and keep it going, or it will fall apart. He/she must work to make learning an intentional practice, and be brave enough to insist that the group's leaders and staff reflect regularly on their experience. They must also have the skill to make it rigorous, consistent, and helpful in surfacing issues which need to be addressed, including sensitive issues.

There was broad agreement within the Learning Community that, as people in an organization get serious about assessment, they should ask five key questions –

1. What do they really want to learn from the evaluation? This should not be determined by what a foundation wants but should instead ensure the assessment benefits the group.
2. What would it take to convince them? What evidence, from what source?
3. What indicators would show them whether they are succeeding and how they might improve their outcomes?
4. How can they monitor those indicators most easily?
5. Are there 2-3 things they really want to learn about this year? Should they concentrate their assessment on those issues for the short-run so they can make real progress, deferring other issues until they can do justice to them in the future?

The Learning Group reviewed a series of techniques which they have found helpful in assessing clients. These are set forth in the box below.

Two model approaches were highlighted during the discussion. The ICA model takes the group through a four step process, analyzing four aspects of their experience on an issue or project --

- Objective
- Reflective
- Interpretative
- Decisional

The “emergent learning model” also is grounded in experience and asks four questions –

- What happened?
- What did you learn?
- What do you want to do with that learning?
- How will you put it into practice?

Techniques for assessing a client community group

- Use strategic planning as an opportunity for learning, requiring that groups look back and assess their progress
- Use retreats to provide opportunities for feedback, reflection, and looking ahead
- Use fundraising planning or planning the transition to a new Director as occasions for reflection and planning
- Debrief after each action or milestone on what went well, what went badly, what they can learn; capture that learning and apply it later
- Involve the group in identifying indicators for assessing progress (e.g. What would be signs you’re making progress? When we had success, why did we?)
- “360 degree feedback”
- “Emotional intelligence” inventory – How do they have to change as leaders to accomplish these things?
- Do “one to ones” with leaders -- Do they feel they’ve grown? How? If they’ve stopped growing, what barriers are there?
- Use “appreciative inquiry” – Where is passion and hope in the organization? What has made you most alive?
- Apply SWOT analysis (strengths, weaknesses, opportunities and threats)
- Use “asset mapping” -- What assets do you have? Help people see the value of things around them, in them
- Drexler Team Performance Model
- SMART GROWTH --a survey that allows an organization to figure out where they are in their development
- Compass Point A-Z offers models of OD learning and assessment work that can be tailored to specific needs
- Consciousness raising -- Getting people to be more ethically, morally aware as background for evaluation
- Get feedback from peers, perhaps by creating some type of peer review or involving peers in visiting a group, assessing its work, and comparing approaches
- Use focus groups to surface problems and solutions
- Get help with mediation which has a learning component, as (dealing with conflict can also present learning opportunities
- Compare the group with models of different types of organizations and see what resonates and what they learn
- Learn more about Kellogg MIRA program (three day convening, needs assessment, small groups sorted into like organizations, self facilitation)

There was agreement within the group that it would be useful to have a simple tool which takes groups through all aspects of OD quickly. No one knows of such a guide that is published and easily available at this time. However, several members of the Group have developed guides which they use and will make available for the group's peer learning and collaborative development during future sessions.

Case study: Using oral histories and related techniques for organizational learning and development:

We used case studies to explore how different people work on the ground. For example, we started one day discussing how a cultural anthropologist in our Learning Community moved from conducting oral histories with a number of civil rights organizations to helping them with organizational learning and development. He had never viewed himself as a "organizational therapist" or "social worker". However, he became both as he was asked to help with conflict resolution and strategic planning and he3 applied his disciplines as a participant observer, oral historian, and ethnographer. We are highlighting this case study because it illustrates so well the situations an OD/OL specialist faces.

When he first started working with these volunteer groups, he found that most had not documented their work at all. He therefore started conducting oral history interviews on the groups' organizing efforts, recording that information for posterity while also providing a base for the organizations' own learning. He then taught the local staff members how to do oral history work.

Over time he modified his approach to include tape-recording discussions among key leaders as well as smaller dyadic one-on-one interviews. This surfaces the organization's history, including its positives and negatives. It also enables him to help the group learn how to fold learning into their organizational work, reducing their dependence on outside OD specialists.

He then **helped the groups incorporate learning processes into each subsequent action and make it more systematic. He found it critical to link debriefing to future planning.** This involves keeping notes from debriefings and reviewing them and the group's goals as it thinks ahead, stressing the message that conscious decisions get results.

This is an example of a point which many participants made. **In helping groups strengthen their assessment and learning processes, it is critical to understand what systems the group already has in place (meetings, reporting, etc.) and to make them as useful as possible, instead of adding new requirements which require added time and work.** For example, an organization's regular meetings provide a good forum for evaluating progress, sharing knowledge and applying it to decisions about the future. Convincing a group to establish good filing systems, keep hard copies, etc. can also help preserve

information which makes it easier to monitor progress and learn from experience. **Efficiency is extremely important for groups with great demands and too few resources.**

One easy approach for supplementing the information which can be gained through established routines is to conduct quarterly recorded conversations with key actors –

- What have you done?
- How did you do it?
- What challenges did you face?

This can be built into regularly held meetings and then transcribed.

Other tools and techniques for monitoring and learning

- Scrapbooks can be a good tool for preserving history, using pictures to tell stories. With life history work, you take out the pictures and talk about them. They evoke memories, are a point of access and good for stimulating discussion and reflection
- Post lessons learned on office walls to help them avoid wasting time re-inventing the wheel
- Use organizational history to educate new staff
- Have staff develop timelines and monitor them
- OD specialists should keep notes to track what they have been doing over the years and keep lessons fresh
- Capture debriefings and build them into the culture – ask “How’s it going?” “What did you think?”, and then bring that information into subsequent meetings so it helps with assessment and planning
- Encourage the group to note the assumptions they start with and then refer back to them in gauging progress and seeking lessons
- Do scenario planning using a variety of possible scenarios so that people develop strategy rather than fixed positions
- Avoid group-think by pushing people to take positions opposite to their normal views
- Use a “ladder of inference” approach to open up thinking (like *Twelve Angry Men* where everyone sees things differently)
- Introduce people to outside ideas; host brown-bag lunches to bring in speakers. Ask those speakers two simple questions -- What are you doing that you think is exciting? What do you think about our organization and what we are doing?
- Use films to stimulate discussion and apply what you learn
- Use cooperative inquiry to involve people from different parts of one organization or different organizations in looking in depth into one or two key issues,
- Create a “work-out” involving several consultants and/or peers in assessment at critical times

There was broad consensus on another vital point one participant made. There is a huge difference between situations when people want knowledge and it is provided “just in time” (they then “grab it” and internalize it) and when they are presented with knowledge “just in case” (when it is seldom internalized because it isn’t needed immediately). This applies to all learning – learning from the group’s own experience

through systems of assessment, and learning on such other topics as model programs and strategies others have developed which a group might want to consider adopting or adapting.

Another important caution also resonated with the Learning Community. While many learning approaches and tools from the business world are useful for nonprofits, **OL/OD practitioners should always use a lens which evaluates the impact of tools to determine whether they produce what the group need and help people collaborate, share leadership, and engage in collective action.**

Finally, we discussed the tough challenge of maximizing opportunities for people who seldom join the dialogue, reflection and planning. We are particularly concerned about people who are often marginalized even within grassroots groups – people with the lowest incomes, youth, women, smaller minorities.

During this discussion, there was general agreement on three strategic issues.

First, each population requires different approaches. One starting point for helping some people become involved and vocal is to bring them together around music and other cultural activities, and use that setting to begin introducing them to issues. With youth, for example, such cultural events can be key, making it possible to bring the youth together, get them talking about their interests and concerns, and invite them to work together.

Second, take very seriously the dangers of retaliation. Marginalized people are often in jeopardy, and it is essential that you create safe spaces for them to express their views as they become involved.

Third, you must raise people’s consciousness and confidence they can create change, but you cannot do this by preaching. They must be involved and must grow to understand power and how to build it.

Transitions As One Example of Opportunities to Expand Assessment and Learning:

Organizational development practitioners are constantly helping groups go through major transitions. These transitions fall into several categories, each of which presents challenges to OD practitioners. Each also presents opportunities to get the group to reflect deeply on how well it is doing. These categories include transitions in --

- Leadership
- Mission – both intentional changes and “mission drift”
- The organization’s life cycle and stage of development
- Aging and the need for rejuvenation
- Generational change
- Growth in size and breadth
- Changes in constituency

- Money challenges causing growth or contraction, or diverting the group from its own priorities to chase dollars
- Changes in the external environment – the local economy, politics, demographics, potential allies and adversaries

Different degrees of change and transition present different challenges. While some are relatively minor in their impact on an organization, others are transformational.

To be effective, OD specialists must have strong diagnostic skills. They must be able to establish themselves quickly and then move rapidly to diagnose what is happening within an organization and its environment, including the nature and extent of the transition(s) the group may be undergoing. They must then help the group's leaders clarify their goals for the transition.

If, for example, transitions from one Executive Director to another create great openings for conducting an assessment and using it to inform a crucial decision -- its choice of new leadership. This is an exceptional "teachable moment" when "just in time" knowledge which captures the reflections and recommendations of key actors inside and outside the organization can have an enormous influence.

This illustrates a key advantage OD practitioners have over "evaluators" who are not well versed in helping a group apply its learning to address major organizational challenges. During a leadership transition, for instance, OD consultants can help a board and staff think through what the transition means for the organization. This can include, revisiting the mission, conducting interviews to learn how different parts of the organization and program are faring, helping the group develop a plan for the next several years, and then basing the job description on the qualifications needed to guide the organization through that period. If additional OD help is needed, they can also help with such important tasks as --

- Helping them consider whether to hire an intentional interim director to help with "grieving" and healing within the organization, steady the ship, clean up any mess, and allow sufficient time to find an outstanding new permanent director; or
- Helping the new Executive Director and Board work well together.

Another, even more wrenching, transition in which both OL and OD help are vital is seldom spoken about publicly. It comes from situations when a dominant Chairperson or Executive Director, perhaps a founder, has been around too long and is holding the organization back. OD specialists often face this situation. They may have been brought in to address some relatively surface issue like management difficulties or the need for a new fundraising plan, but then find that the central issue is the group's need for new leadership.

This raises ethical as well as practical issues for OD specialists. What is their role as OD practitioners? If they conclude that the ED should go, what should they do?

Within the Learning Group we agreed on three points concerning these issues:.

- The consultant should clarify who is the client – the ED, the Board as well as the ED, the community, the funder?
- They should be honest and transparent about whatever they do
- They may find the following techniques useful --
 - Interviewing many people to get their perspectives
 - Giving voice to their perspectives, either by reporting the concerns without violating confidentiality, or using “undiscussables” in a group setting – having people list deep concerns on cards, shuffle them, and then have people read off whatever card they are handed
 - Ask the questions no one else will ask openly; perhaps using some objective tool or list of questions which “justifies” them raising this issue as a “routine” issue they always raise in providing OD help.

This is an example of the kind of issue where peer exchange in a safe and confidential setting is invaluable.

Creating a Learning Culture:

Groups often undervalue their own experience, knowledge and capacity as learning organizations. They may need help seeing how much they are already learning and that paying greater attention to learning can strengthen them as actors in changing things for the better. One key task for OD practitioners, therefore, is to create this consciousness and foster deliberate planning so the group strengthens its assessment and organizational learning process, improves its own functioning, and increases its impact.

While it is very difficult to change organizational cultures, certain practices and policies can help reshape a culture. For an OD practitioner, getting answers to several initial questions can set the stage for helping a group become a learning organization --

- What is the current culture of learning? e.g. it may be a culture of learning and acting on the run
- What issues do they really want to learn about? Focus on their felt need for learning to make it apparent that they are doing it already
- Are there moments which can be used to help them recognize their need for learning? For example, there may be conflict and flash points in the organization
- Tie learning into occasions when they already gather together
- Can you create spaces for co-learning? e.g. debriefing with 25 people in the room
- Make it fun. Perhaps use film or reading and ask them what they thought of it
- How can this learning be broadened?
- How can you get them to commit?

In our work we have found two approaches to assessment and organizational learning to be particularly effective in helping groups learn and develop their capacity to assess and learn. These are –

- facilitated self-assessment, and
- peer assessment

Techniques for strengthening the learning culture --

- As their consultant, make a strong case for assessment and organizational learning
- Identify the ED or another organizationally influential strong champion for OL, and develop and work with him/her as advocate
- Start with the key question for groups – How are you learning already?
Demystify it.
- Build on their own systems by first making the implicit explicit, by surfacing the learning processes which are already in place and validating them as informal but nonetheless useful
- Stress that assessment is a process for looking forward and a great tool for learning and planning, not a process of looking back and judging; it's for “improving, not proving”
- Help them address any internal conflict there may be which blocks learning
- Use discussion of their “weaknesses” to develop their desire to make change
- Develop a learning agenda of issues they care about/Incorporate it into your TA plan
- Get the group to develop learning strategy together
- Use popular education techniques for learning
- Create models of learning, i.e., begin by setting up spaces and relationships that encourage learning in ways that people can integrate into their own work
- Make it fun, not “organizational broccoli”
- Consider involving young people in documentation and learning work, using it as an opportunity to build intergenerational relationships
- Use emergent and action reflection learning techniques – what happened? what have you learned from it? what do you want to do differently in the future?
- Make sure there is some ease in gathering information, or else learning might stall
- Use best practices learning to stimulate their thinking; perhaps involve peer learning circles to achieve this
- Try Positive Deviance – look for deviations from the norm, who doesn't have the problem? why? Look for a success in the organization and then replicate it. Scan the groups you work with for successes.
- Include learning from peers as part of strategic planning processes
- Encourage groups to read key books and articles which will help them reflect
- Develop detailed time line and help them keep on track with their ongoing OL

Opportunities to Move From Easy, Quick Help to Deeper Engagement on Organizational Issues:

One member of the group opened a problem-solving session by asking – What is the potential for creating a system for providing one-shot OD advice to groups, either as a hotline, or on line, or otherwise? Many organizations need quick advice and don't have time or money to create an ongoing OD relationship. How can we help them? Can this help be a point of entry to more serious OD help?

There was extensive discussion of this scenario. In general, while several people were open to setting up a regular time when they would be available for phone calls or e-mails requesting immediate advice or feedback on a particular organizational question, the group felt uneasy about a number of ethical and political issues.

Two concerns were particularly strong. First, a person may use you and your quick advice to manipulate their situation, increase their power, and reinforce their faction within an organization. The calls therefore must be screened to differentiate between issues which are only technical, and cold calls requesting strategic advice (which most in the Learning Community would not give without deeper knowledge of the organization).

Second, if you do not know the group, your advice may be harmful. This problem gets more complicated if you charge for the help, as you may incur liability unless you have a waiver of liability specifying that “whatever we tell you is based on what you've told us.”

In addition, there is a major challenge in getting groups to use information after they develop it, especially if it was provided on a quick one-shot basis. A transfer strategy is essential if the group is to internalize organizational learning into their culture. Groups frequently need expertise and continuing help to establish stronger learning systems and processes as it usually takes up to three years with decreasing external coaching and facilitation to internalize learning as a strong part of an organization's culture. Communities understand the need for assessment if they see real added value and if the approach is collaborative.

Externally Mandated Evaluations:

For an OD practitioner, the primary purpose of assessment and organizational learning is to strengthen the organization and increase its capacity, power and impact. Therefore, much of our time was devoted to learning useful ways to link organizational learning and OD work.

However, the Learning Community's members are keenly aware of how important it is to help funders learn how well their funding is being used, what its impact

is, and what can be learned from the experience. Furthermore, as people committed to broader social change, we recognize how essential it is to capture lessons as groups wrestle with our society's toughest issues so those lessons can be applied elsewhere and our society can make greater gains on issues of poverty, race, power and social change.

We have, however, concluded from experience that these goals of accountability and broader learning can best be achieved by shaping external evaluations to build upon the assessment and organizational learning systems the groups develop to meet their own needs. External evaluations which ignore those systems often gravely weaken them by forcing groups to shift time, attention, and resources away from them. They thus can undercut efforts to strengthen an organization -- a perverse impact for funders committed to strengthening nonprofit capacity to address community issues.

It is, of course, often reasonable for external evaluations to call for data and analyses beyond what a grantee is already producing. The group's current practices may be inadequate to meet a funder's needs or even the group's own internal monitoring and accountability requirements. As specialists in strengthening nonprofit capacity, we know that **groups often need stronger evaluation and learning systems, including strategies for getting some outside perspectives on their work.**

We follow six basic rules in advising community groups and funders on reconciling these different needs regarding evaluation and learning.

First, make explicit the group's current systems for tracking progress and learning from experience. Design any evaluation to build on those systems, help support them and fill in the gaps.

Second, limit the funders' requests for additional information and insights to what is clearly needed. Do not overload the group and the evaluation itself with unnecessary inquiries and reporting. Use a "need to know" rather than "nice to know" lens.

Third, whenever possible adopt the grantees' own criteria for judging performance.

Fourth, incorporate within an evaluation any issues the group's leaders would like to understand better so they clearly benefit from the process.

Fifth, follow a truly participatory approach, involving the grantee in every element of the evaluation from design through data gathering to development of the conclusions and recommendations.

Sixth, and most difficult, try to develop a trusting relationship which allows the grantee and grantor to discuss failures, weaknesses and needs candidly. Not talking about these issues blocks everyone from learning and improving.

Accountability Issues for OD practitioners:

Everyone in the Learning Group faces dilemmas of “dual accountability” in various situations. These raise serious ethical as well as practical issues for them.

Sometimes OD/OL practitioners work with both the funder and grantee, with little clarity about who is the client. What are the ground-rules to guide them? Who sets the goals for their work? What information should they share with whom? How interventionist should they be?

OD/OL specialists can face even more complex accountability situations. They may, for example, be hired by a support organization but also be working with both the social change group and funders. To whom are they accountable? How should they deal with issues of trust, confidentiality, and priorities?

Another dilemma emanates from the motivation which drives OD specialists to pursue greater social justice. How should they handle themselves with integrity when a group asks for simple OD help and is not seeking to bring about social change? Should OD/OL practitioners set aside their own commitment and concentrate exclusively on the OD request? Or should they use the occasion to explore whether the group is interested in getting broader assistance, including on a social change agenda? In one person's words, “At times, we can have two agendas and they don't even fit on the same page.”

For these situations, what should be the ground-rules? In addition to transparency and open discussion of the terms of engagement, are there other standards which should be followed?

One person works for a coalition which has developed an approach which he feels works well. The coalition helps channel funding to 17 member organizations and provides training and technical assistance as well. The groups in turn agree to organize to support the coalition's citywide policy campaigns. This may raise another dual agenda problem: in return for the funding and TA, the groups may be pushed in different directions than they otherwise might have gone. Does that dilemma disappear if they enter this situation knowing the terms of the relationship and if their leaders participate in the coalition as it decides on the citywide campaigns and agenda?

There was consensus that OD/OL specialists must make their own ethical and practical decisions in these situations. In the Group's view, **OD practitioners must be clear on their own values and principles and know when to walk away or turn down work which puts them in compromising positions.** In doing so, however, they should decide how to pick and choose their battles and not be too dogmatic or idealistic.

How do we assess our own professional work? How can we strengthen our own self-assessment for the future?

There was broad agreement that, if we are to help others with assessment and organizational learning, we must become more conscientious about turning those processes upon our own work. Several participants volunteered that they do not devote sufficient time to assessing their work. Some depicted their approaches as casual.

Alternative strategies for self-assessment by OD practitioners

- Assess yourself on key question -- Am I being called back by groups?
- Assess whether the group really wants you there
- Assess whether a “person is willing to learn from you”
- Schedule client debriefs at end of each visit or session to see what could have been done better
- Use journaling and downloading; write and then review trip reports
- Have a partner or constant colleague giving feedback
- Call a buddy and act as sounding boards for each other
- Shadow someone else
- Hire a coach
- Develop study circles through which you share models, read and discuss articles, discuss and analyze own work, conduct cooperative inquiries on common concerns
- Develop relationships of trust within a network where you can discuss key questions and issues
- Schedule conference calls with several people for problem-solving on key OD or OL issues you’re facing
- Listen to what others do, and compare and evaluate your own work in that light
- Use a professional evaluator for feedback
- Assess your own work in the context of lists of OD competencies which others have developed, including interpersonal skills, consulting skills, etc.
- “Learn to open yourself up”, which takes time, self-confidence, and an understanding that criticism is “not about you”
- Develop a series of questions and review your own performance against them
- Develop a theory of change or list of operating assumptions, and then periodically review how you are doing

The Future of the Learning Community:

Who are we?

A “forming group” of OD/OL practitioners who want to do social change/justice work better – to keep strengthening our skills in helping grassroots groups learn, plan and act with increasing impact, and to reach and reinforce a growing number of people – especially young people -- who share our commitment to providing organizational learning and development help to social change organizations.

An intergenerational peer group and source of creativity in the OD for SC field; a place for learning, mutual support, and thinking through creative new approaches which we then apply at the grassroots level. Our learning circle is planning, action, reflection, planning, action, reflection.

We came into OD/OL work from different entry points and play different roles (e.g. researcher/OL, organizer/OL, adult educator/OL, etc.). This greatly enriches our dialogue.

We have gone through a successful broadening of our leadership, broadening beyond the original planners to include other members of the group.

We have created the backdrop for much deeper knowledge production and learning.

We have many things we would like to discuss with each other – from practical tools and techniques, to real-life situations we face, to new ideas and approaches, to the broad political, societal and philanthropic developments which are affecting our work.

Our goals –

A. Improving our practice at organizational learning and development practitioners

- Learning from each other in various ways
 - Large and small group discussions
 - Open space
 - Reading and discussing articles and books together
 - Becoming more familiar with each other’s work and top skills
 - Problem solving and discussing common challenges together
 - Sharing lessons, tools and techniques face to face and electronically
 - Testing ways of working together, including seeking ways for 2 or more people from the group to work together
 - Focus longer on specific topics, such as working through best ways of providing strategic planning help
- Being a mirror/Turning the light of interactive self-assessment on our own practice
- Discussing ethical issues we face in our OD work such as –

- Dual agendas and how they: involve being clear on one's values and principles and also involves knowing when you should walk away.
- What to do when groups want OD help and OD specialist has a different perspective or agenda for group/social change.
- When to turn down work that puts us in compromising positions

B. Contributing to the field of community and social change

- Creating a model of OD learning which can be replicated on a regional level
- Increasing understanding of the current landscape of OD practitioners – Numbers, diversity, younger people, range of skills]
- Working to improve that picture
- Helping OD practitioners overcome their isolation and become more visible
- Being a voice, visible presence in the field
 - Making the case for facilitated and interactive self-assessment and peer reviews, helping funders and others to understand their importance
 - Codifying lessons from our experience and making it accessible
 - Developing our own model of interactive peer learning and self-assessment
 - Becoming part of the dialogue
 - Encouraging new people, including young people, to come into this field
 - Training/educating others in OD/OL, perhaps with universities
- Addressing the financial issues which present huge problems for groups needing OD help and for growing the field of OD practitioners

Our plans for working together in the future --

- Working as a small group with growing trust and relationships
- Growing moderately and organically, in stages, through our contacts and outreach
- Reaching out to growing numbers of younger people
- Always applying or tools of interactive self-assessment and peer assessment upon ourselves and our work together
- Being entrepreneurial rather than dependent upon foundation grants, but seeking moderate foundation support for at least the short-run
- Being intentional about documenting what we are learning so we can share it with others, especially the evaluative and reflective work we do
- Creating a buzz within community groups about our approach to assessment, organizational learning, and organizational development which gets back to funders and others
- Using listservs, shared data bases, threaded conversations and other electronic means to increase communication and learning among us
- Perhaps offering workshops in which several members of the Group would collaborate to reach community groups, other OD specialists and other clients
- Exploring different models for giving solo practitioners access to more mutual support and opportunities to collaborate.

Appendix A.

BRIEF INFORMATION ON PARTICIPANTS IN CLUSTER ON ORGANIZATIONAL LEARNING AND ORGANIZATIONAL DEVELOPMENT

Elizabeth Banwell

I have spent the past 14 years working with non-profit organizations as a staff person, volunteer, and consultant, helping them develop their organizational capacities. These organizations range from grassroots start-ups (small hospices, teen centers, and girls organizations) to established organizations (Outward Bound, Aspen Institute and hospitals) to foundations (bank foundations and community foundations nationally).

I am extremely aware of the difficulties grassroots groups face sustaining themselves, and I would love to talk to other practitioners about their approaches for helping these organizations develop and stay healthy. Also I am interested in learning as many different approaches and strategies for systemic leadership development and succession planning.

Barry Checkoway

I have provided consultation, training and technical assistance to community groups and civic agencies in economically disinvested and racially segregated rural and urban communities worldwide, including North and South America, Europe, Africa, and the Middle East. I am a professor of social work and urban planning and coordinator of the University of Michigan's Community Organization Program, this year involving more than 125 students in organizing, planning, and development work. I write frequently, including a series of recent workbooks, e.g., *Young People Creating Community Change*, *Participatory Evaluation with Young People*. Youth development and organizing programs are among my specialties.

I am most interested in exploring whether there are special issues that arise in organizational learning in the world's most economically disinvested and racially segregated areas and, if so, what are they?

Victoria Creed

I have 30 years experience working with social change organizations primarily in rural and small towns across the US and with a concentration of experience in the Appalachian and Southeastern regions. My work has included leadership development and all aspects of organization development following a participatory model which assesses systems and structures, human resources needs, organizational culture and organizational politics and power issues. Previously I ran the Southern Appalachian Leadership Training Program (SALT), and my experience includes a graduate degree in organizational development,

experience working with Myles Horton of Highlander Center and Paolo Freiere, and extensive consulting for Kellogg and other foundations.

These days I especially love working with organization culture, spirit, and healing because I am deeply concerned about how grassroots community-based organizations and their leaders have been severely wounded by the last twenty of constant assault and the toll this has taken on them. My practice includes facilitation, conflict transformation, coaching,, teaching, training, facilitated self-assessment, organization learning & reflection and longer term change work. With most organizations I do a combination of group work within the organization and individual work with leaders and the work develops over 1-3 years depending on the change identified.

I am particularly interested in having an opportunity to meet and learn with people who are doing similar OD work throughout the country for peer exchange, mutual support and a chance to get to know people with whom I might collaborate on OD work in the future. I am deeply concerned about the lack of OD help for grassroots groups and how the shortage of funding for grassroots groups is making it increasingly difficult for them to pay for the OD help they need. I am also very interested in talking with others about how to heal and restore the spirit to grassroots leaders and their organizations.

Georgina Drew

This is my first year as a graduate student of anthropology at the University of North Carolina, Chapel Hill. I am in the social systems subset of the department and I work with water social movements (as well as other environmentally-concerned groups) in India and South America. I have been working with the anti Coke and Pepsi social movements in India as they struggle to assert their rights to safe, ample water resources throughout the country. While in India, I also supported the national movement for organic agriculture I helped organize the mobilization of forest communities to Cancun during the World Trade Organization's meeting there. My hope is that a firm understanding on the factors that lead to the successful mobilization of communities will also put me in the position to one day give consultation that enhances the functioning of these groups.

I am particularly interested in –

- Learning community members doing self-evaluations to assess our motivations, expectations, and goals as activists so we can then ask ourselves, "How can we as individual actors with varied interests and skills be the most effective proponents of social change?"
- Looking at how best to support large movements that have players with different backgrounds and talents. What are the most effective methods for harnessing the maximum potential of the strengths of our communities? What are strategies for dealing with internal conflict in the most compassionate, reinforcing, and efficient manner possible?
- How do we, as actors, learn when to let go of the reins when it is appropriate in order to empower others and when to step in and mediate in times of difficulty?

Cristina Lopez

I have provided OD TA for more than 15 years to Latino service providers), minority health-focused advocacy groups and service providers, and most recently immigrant organizations. I currently am Deputy Executive Director of the Center for Community Change where we work with dozens of grassroots groups on OD questions as well as their work on community issues and public policy campaigns.

I am looking forward to being with other OD specialists and discussing lessons learned/best practices in working with emerging under-resourced organizations, and with multi-ethnic/multicultural coalitions. One special interest is situations of organizational change and transformation, including helping organizations go from grassroots groups to community institutions (i.e. infancy to adulthood), and the types of issues organizations must address in each of these stages. Many organizations are going through leadership transitions and generational change, with founders/long time directors leaving and new leadership coming in. Our immigration involves helping to start and/or strengthen multi-ethnic coalitions where you may have very diverse perspectives and the power politics of a dominant nationality/ethnic group with other small but equally important players.

Andy Mott

I have been providing organizational development TA to grassroots groups in many different cities and rural communities for almost 40 years, most of it as a staff-member at the Center for Community Change. During that time my OD work included strategic planning, Board and staff development, issue and program development, fundraising, and helping groups form partnerships and coalitions to enlarge their impact on community issues and public policies. I established the Community Learning Project in 2002 to concentrate on a series of initiatives to advance learning in the field of community change, including efforts to expand the availability of organizational development help for grassroots community groups and coalitions. Other projects include efforts to expand university education to prepare young people for careers in community change or to provide midcareer practitioners with advanced education, experiments to reconnect “alumni” of this work with groups which are now tackling community and policy issues, and efforts to expand peer learning and collaboration in a variety of other ways.

My OD work is with organizations controlled by poor people, helping them build powerful and effective organizations which can bring about substantial change in their own communities and in policy arenas. I’m looking forward to this opportunity to think through with colleagues some of the knotty questions related to organizational development and such questions as --

- What are particularly good strategies for helping groups understand, make more explicit, and strengthen the usually informal approaches they currently have to assessing their work and learning from it, then feeding it into course corrections and longer range planning?

- What are the best ways to assess groups' policy work – direct impact on policies, impact on leadership education and development, increase in the groups' power and longer range influence, etc.?

Danyelle O'Hara

I have had almost 18 years of on-the-ground building experience, both in the US and in Africa and some experience in monitoring and evaluation. For the past three years I have worked part time as a consultant on two projects: the Community Based Forestry Initiative, a 13-site national project funded by the Ford Foundation and managed by the Aspen Institute; and the Program for the Rural Carolinas, a 20-site project in the Carolinas funded by The Duke Endowment and managed by MDC, Inc.

For CBF I provide technical assistance to rural grassroots groups in southwest New Mexico (the Jobs and Biodiversity Coalition) and in southwest Alabama (the Federation of Southern Cooperatives). The nature of my work with JBC has been to help them think about how to broaden and if necessary transform their community forestry efforts to include more of the community they are working in, particularly the Hispanic community. This has included providing some guidance and space for reflection on community engagement, as well as helping them through a process of self-monitoring. The nature of my work with the Federation has been to help build their capacity in planning, documentation, and evaluation – helping them think about where they want to go, how to get there, and if they've gone where they wanted to go.

For PRC I am part of the "Learning Project" team which assesses and documents lessons across the program initiative. The Learning Project is led by Chapin Hall (University of Chicago). My role on the team has been to listen and document community stories and to pull lessons from the stories in a way that the program as well as the broader "community change" community can benefit from them.

Earlier in my career, I worked for eight years in the World Wildlife Fund's central Africa program, helping build the capacity of a local NGO involved in forest conservation. Early on, I was with Catholic Relief Services in West Africa for three and a half years, where I also worked with local NGOs doing community development work.

Heather D. Parish

I am an independent consultant who specializes in developing strategies and capacity-building initiatives for community economic development and finance, and entrepreneurial/business development. I provide a wide range of technical assistance to community-based and non-profit organizations, foundations, public sector entities, and public/private partnerships.

My philosophy is one where I truly believe in helping my client organizations become more self-sustaining and independent of consultant expertise, and I am very interested to learn from my peer consultants how they approach capacity-building and providing

technical assistance with grassroots organizations and their leaders, especially in an environment of shrinking or re-prioritizing of resources. Particular issues I'm interested in include --

- Ways to connect grassroots groups with each other so that they can build a peer support learning community.
- Effective leadership development models for grassroots leaders – in my experience, many resident leaders are often challenged to stay motivated and involved consistently because of very challenging personal circumstances they must face daily
- How to balance what I call a “dual client commitment” when working with grassroots organizations at the request of or on behalf of funders

Marianne Philbin

I began my career working for grassroots peace and justice organizations, moved to the world of philanthropy, and now work primarily in the intersection between the two. In addition to my work with foundation and nonprofit clients, I'm an instructor on nonprofit governance issues for The Donors Forum of Chicago, a Lecturer at Northwestern University, and have written a couple of books aimed at building understanding and support for nonprofit organizations

I want to find and promote ever more effective ways of strengthening nonprofits, as well as to combat the myths and misperceptions about nonprofits that seem to never go away... myths and misperceptions which place a particularly heavy burden on smaller and grassroots organizations. I'm particularly interested in --

- how to better educate donors about nonprofits, when “donor education” is rarely funded; how to move the conversation away from this current emphasis on “buyer beware,,,”
- how to deal with the reality that the field is becoming increasingly professionalized (in largely good ways!) but new people coming to the work still come from a background of little to no nonprofit experience— which leaves them and their organizations at a greater disadvantage than even ten or fifteen years ago;

Francois Pierre-Louis

I have worked as a community organizer for more than 20 years. I am now a national consultant with PICO, a network of community organizations in the United States and Central America. The consultation involves leadership training, helping directors and leaders develop strategic and practical plans to move their organizations forward. In addition, I am a professor of Political Science at Queens College, CUNY and associate director of an institute at Queens College which trains parent leaders of several community organizations to become more effective in addressing education issues.

I hope that by participating in this program, I can mentor younger people who are entering this work and at the same time have a forum to help them learn from each other

while sustaining their enthusiasm to continue in this field. I hope to meet people who have fresh ideas and are willing to challenge my thinking and approaches to organizational development and learning. Key issues I'm interested in are –

- How has technology changed the way we organize today?
- How do we deal with the feminization of community organizing and what can we do to help young women and minority stay in this work?

Charles Price

I am presently an assistant professor in the department of anthropology at the University of North Carolina-Chapel Hill. I work with several community organizing organizations in the American South. My experience and approach have been driven by research and providing general support rather than consulting or direct TA provision. However, much that I do could easily fit under the labels of technical assistance (e.g., assessing organizational structure, performance and needs in terms of leadership, governance, membership, etc).

I want to hear in detail what people are doing around capacity-building outside of what I read in reports, journal articles and newsletters. For example, I am working on developing a format for training grassroots groups how to document their own organizing and organizational work. But I feel I am working in isolation as I cannot find others with similar interests. Among the issues I'd like to discuss are --

- participatory evaluation & action research
- documenting organizing and organizational work and impact
- college students. How can we integrate them into this kind of work, or should we? And how can we link community groups and college students.

Juan Sepúlveda

I am the President and Founder of The Common Enterprise (TCE), a national consulting group headquartered in San Antonio, Texas that grew out of a national Rockefeller Foundation initiative. TCE's mission is to provide high quality organizational and management consulting services to nonprofit groups, foundations, governments and businesses interested in serving their communities. I try to connect with as many free agents—other organizational consultant folks—across the country to partner with me on projects. More recently, I've been heavily involved with the Northwest Area Foundation working on poverty reduction efforts aimed at three different American Indian tribes; the rural Latino communities; and the urban American Indian community in the Foundation's eight-state region. I mention these because they have been community-wide efforts to do strategic planning that emphasized organizational learning and development pieces.

I hope to find the beginning pieces of a community of practice where we can come together at different times of the year to compare notes, trade experiences, and learn from one another. I'm doing this on a local level in Jacksonville, Florida where I'm working with approximately twenty people a year to teach them to do locally what I do nationally.

We're in our fourth year of the program called the Jacksonville Youth Development Community Coaches program.

The three issues I'm currently most interested in (because groups I'm working with are most interested in them) are – strategy, nonprofit governance, and systems work. :

David Shuffler

My current job title is the Director of Organizing Training for the Initiative for Neighborhood and Citywide Organizing, a program of the Association for Neighborhood & Housing Development, a citywide coalition in New York City. I provide TA support, varying upon organizational need and capacity. I provide support in areas of: organizing campaign development which includes leadership development for organizing staff and leaders, large group and individual trainings, trainings for the board of director's, coordinate peer to peer mentoring based on need and experience, capacity building and organizational infrastructure.

I would like to discuss with peers is how far to challenge/nudge a group if there organizational infrastructure is not strong. Organizations develop at their own pace, there is not a standardized approach applicable to every group. The importance of that discussion is as I provide TA to groups based upon where they would like to go and where I see them years down the line how much is too much.

Eugene Wright

I am presently an evangelist and principal of a community development ministry which transforms inner-city communities through community building, spiritual renewal and wealth creation. I direct one organization and assist others which represent English-speaking visible minorities and immigrants, helping them with enterprise development, strategic planning and financial management.

Conferring with a group of highly motivated and highly focused people would provide additional clarity for me to better understand the direction in which I am being led at this point. Among the issues I wish to discuss are issues related to devolution of government social programs and cutbacks, and their implications for grassroots groups. My experience in the aerospace industry leads me to believe that the downsizing of government social services to community organizations funded through the private sector is not sustainable in the long-term without a drastic reduction of services. How do communities who have a legitimate claim on funding for health and social services in the old world order adapt to the new reality?

Fundraising by non-profit organizations through foundations and government transfers is particularly challenging for new community organizations based in inner-cities. What efforts are being made to develop new financial instruments that allow for the appropriate and sustainable capitalization of community organizations?