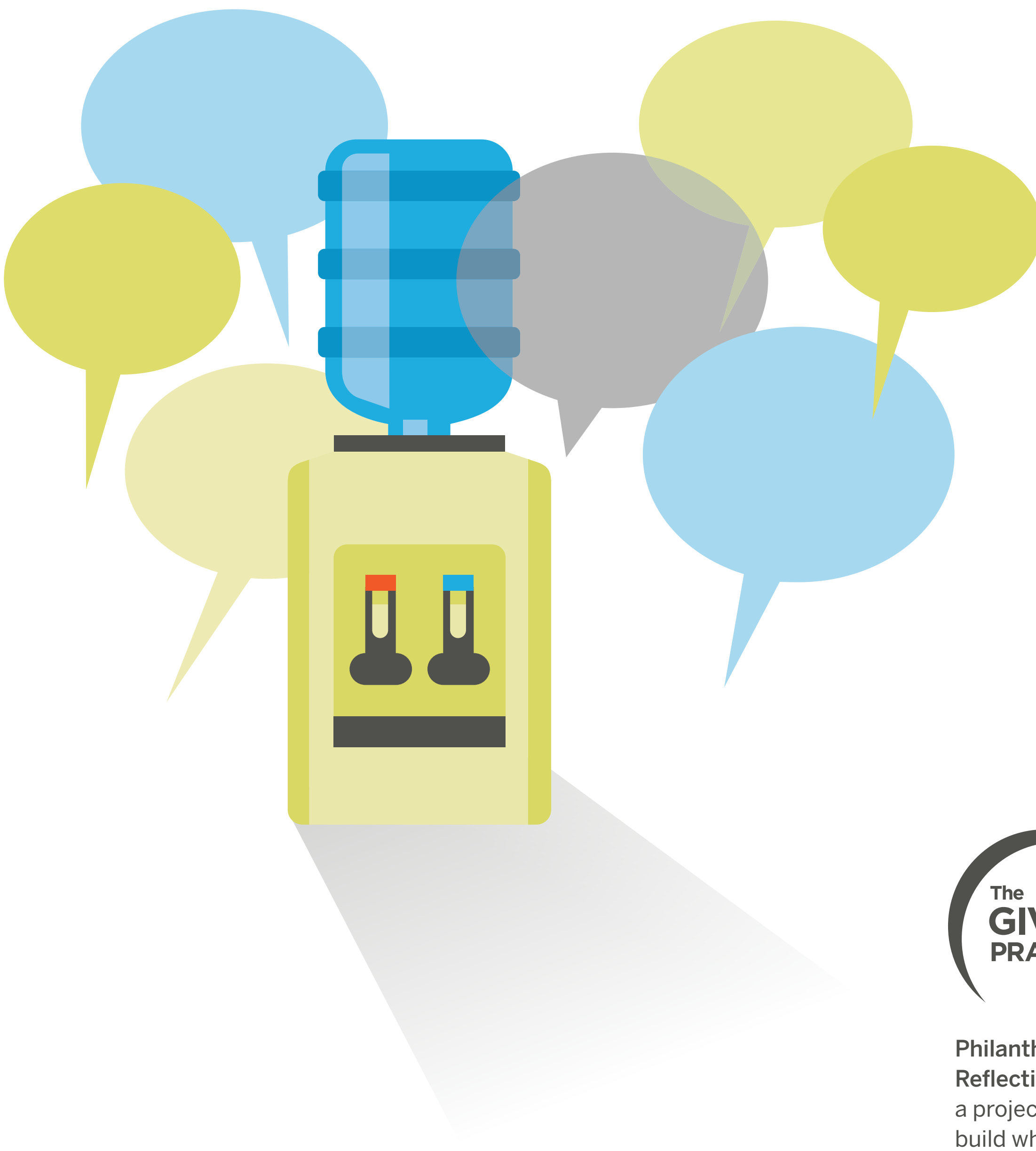
PRP
BRIEFS

Enlist Peers

Create Today's Watercooler



The GIVING PRACTICE

Philanthropy's Reflective Practices: a project to help you build what you bring to your work

Enlist peers to learn about the *how* of each other's work. It's less about solving problems and more about building on each other's stories to create new knowledge.

A classic case about learning and communities of practice came in the late 1990s from what was then called Xerox's PARC, or Palo Alto Research Center. Their chief learning officer, John Seely Brown, hired ethnographers to figure out how Xerox's 21,000 technicians around the world learn to solve day-to-day problems that are not in the manuals. The ethnographers discovered that the technicians learn by telling each other war stories, sharing dilemmas, and building and discounting theories about what works in different situations—all during informal gatherings playing cribbage or around the watercooler.

Many interesting lessons were learned about knowledge transfer and communities of practice by studying these informal learning groups. In our digital age, these informal opportunities for building a joint narrative are few and far between. Too often we are alone with the dilemmas we face at work.

Try a Peer Consult

1. Set out some rules of the road for participation. Usually confidentiality agreements are key to establishing trust. The purpose is joint learning (remember the Xerox lads!), so there is no need to tell the dilemma presenter what to do or expect he/she will do anything that is discussed. Check in with everyone for suggestions about what it will take for them to be fully engaged in this activity. You may be surprised.

2. Take time to write down the dilemma. Write about the experience as if you were viewing it as a movie scene or from a balcony. This form of observation will help you float above yourself and see the incident as objectively as possible. Check to make sure it's an *incident of fact* and not a *belief* (e.g., fact: "A grantee and I disagreed and she went to my boss"; belief: "My partner undermined me"). Answer these three questions: What was I trying to accomplish? How did I go about it? What was frustrating for me?

3. One presenter tells his/her story. A counterintuitive tip: if you're the presenter, turn away to take notes or, at least, avoid eye contact while the group is discussing your dilemma. Why take yourself out of the picture? If you are facing the group, you will diminish your learning and those of others by unintentionally affirming or denying what is said with your facial or body gestures. By making your dilemma but not yourself visible, your colleagues build their own conversation; your job is to just listen and not react. It may seem awkward at first, but it usually deepens the learning opportunities for the discussants and the presenter.

4. The presenter responds to clarifying, versus leading, questions from the group. A clarifying question is one you don't already know the answer to. For example: "Has this ever happened to you before?" A leading question is one where you are trying to suggest a solution. For example: "Have you ever tried using a logic model to solve this problem?"

5. The group talks about the dilemma among themselves, without the presenter's facilitation or participation, based on their own experiences with similar dilemmas. What have they done in similar situations? The presenter of the dilemma does not participate in the conversation but records what is said.

6. After the time period allotted, the presenter shares observations about the group's comments, only in terms of what stood out as food for thought. The point is not to give gold stars or rate comments for good or poor feedback.

7. If there is time, someone else presents and you do the whole thing again.

Assign an observer and a timekeeper to the group. The observer can lead a conversation about what it felt like to consult to the dilemma and what everyone learned from the process. The timekeeper can help the group respect the time boundaries for the activity.

Having difficulty getting people to volunteer to be the dilemma presenter? As an alternative to starting with a peer consult focused on one person, Ryan Chao from the Annie E. Casey Foundation reports that his program team builds readings and reports into ongoing meetings to lift up issues that will stimulate requests for peer consultations around dilemmas.

Why Philanthropy Practitioners Enlist Their Peers

Everyone learns. Presenting a dilemma is a great learning experience. Participants say that consulting to someone else's dilemma is a reflective practice on its own! The idea is not to be the expert with the answer. You help by sharing your experience with similar situations and what you learned from them. That requires vulnerability and disclosure of your own imperfections. In addition, you try to be a generative thinker—building off of each other's thoughts. Like the Xerox technicians at the watercooler, by exploring each other's ideas—rather than making one-off speeches—more learning takes place for everyone.

Relationships deepen. Investing in peers over time can lead to new and valuable relationships. We asked a group of executives who meet to share experiences whether relationships changed through the peer dilemmas. A colleague told us this story: "People think I am joking but I am not—the peer cohort on diversity, equity and inclusion has allowed me to have truly honest, trusting and meaningful relationships with two white men. I don't think people with privilege fully appreciate how hard it is to peel away decades of negative experiences I had with white men. By being able to witness their honesty and vulnerability, I was able, over time, to hold less and less back. This only happened because we were all willing to commit to a full day, four times a year, to sit with each other and reflect on the many challenges we face as diverse leaders and people. And the result for me is two important allies and a renewed sense of optimism in the world (sometimes)!"

Assumptions and beliefs are clarified. Peer consults often uncover an unexamined assumption that is undermining a strategy. One of our colleagues used a consult to explore how to raise with his board some of the tensions he felt were coming from the unexamined privilege of being a private organization for public good. "I have noticed a real reluctance by our board to be very public about the work we fund because they want to stay humble and private. But I also know it would help our grantees if we were more open about our point of view. It's a privilege to be able to stay quiet because you don't have to worry about being called out. I used reflective practices—conversations with colleagues and peer consultations—to more fully understand the issue and my own reluctance to raise it.

> ***"By stepping back and opening up to myself and others I respect, I deepened my insight into why this issue troubled me and developed strategies for how to be true to myself and my point of view."***
> *—A Philanthropy Northwest colleague*

Peer consults gave one practitioner "the space and time to share my fears about being a stronger advocate for diversity, equity and inclusion with my board. By sitting with peers who had common experiences as well as those who had more supportive environments, I gained the courage to share how important this work is to me as a woman of color. I don't say this lightly. There was even a moment when I felt that I could have lost my job for speaking my truth. By revealing my authentic self in a way I never had done before, I was not only successful in starting conversations about equity and inclusion among the board members, but most importantly, I also became more comfortable sharing my own vulnerabilities with my board."

Doug Stamm, the Meyer Memorial Trust CEO, was part of Philanthropy Northwest's first cohort of executives to meet on leading diversity, equity and inclusion strategies at their foundations. They used a peer consult framework at their meetings and once the program ended, the cohort decided to continue as an informal network available to consult to personal and professional dilemmas.

> ***"You can have coaches and consultants, but I do think a peer cohort with a diverse mix of leaders of color, sexual orientation and stage of organizational development is extremely powerful."***
> *—Doug Stamm*

Several practitioners we've interviewed are part of peer cohorts that have evolved over time. What they have in common is a focus on the *how* of their work. They meet a few times a year and for some groups, they've agreed to be available for peer consults whenever needed. Rob Kaufold, CEO of the Hemera Foundation, is part of an informal family foundation group that formed after working on a few projects together. They meet monthly for peer consults via video since they are spread across the country.

Why This Project?

In philanthropy, you have two big jobs.

Your **first job** is to build deep knowledge about the *what* of the work that you are supporting. You stay current with new knowledge, find networks for ongoing learning, and grow your expertise.

Your **second job** is to put that expertise into play—the *how* of the work:

- How do you nurture generative thinking amid complicated group dynamics and power differentials?
- How do you keep learning alive among colleagues and partners?
- How do you strategize with others when there is no right answer to guide you?
- How do you contribute to the work of diversity, equity and inclusion in your organization or in a field?

Philanthropy's Reflective Practices can help you build what you bring to your second job.

Our goal is to learn and share the tools and skills used by practitioners in philanthropy to improve how they work and get to better outcomes in challenging situations.

PRP Briefs can help you start talking about the "how" of philanthropic work with colleagues, board members and partners. Each brief includes relevant examples, useful frameworks and an exercise that you can use with your team or partner to build what you bring to the work.

Want to Learn More?

Read our recent guide, browse posts from philanthropy colleagues or download the other briefs at www.reflectivepractices.org. Sign up to receive new material as it comes online. Want to build reflective practices inside your organization? Contact Jan Jaffe, project leader for Philanthropy's Reflective Practices (jan@reflectivepractices.org).