

Chapter Seventeen¹

Accelerating Learning about Leadership Development:

A Learning Community Approach

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Imagine being asked as a leadership program evaluator, “Is the investment we have made in this leadership program reducing poverty in rural areas, reducing violence statewide, reaching the critical mass of leaders it will take to have an impact on population growth in the developing world?” Designing leadership development evaluations to explore and answer these questions is a complex process. It involves deepening an understanding of the questions being asked, identifying appropriate outcomes and indicators, developing robust methodologies for exploring what people want to learn, and preparing audiences to use findings effectively. No single leadership practitioner, evaluator, or funder can figure this out alone; it requires a broader community.

In this chapter we discuss our personal experiences with the creation of a leadership development evaluation learning community. We describe the use of collective

¹ A version of this chapter will appear in Kelly Hannum, Jennifer Martineu, and Claire Reinelt (Eds.), Leadership Development Evaluation Handbook, San Francisco: Jossey-Bass (forthcoming in November 2006).

learning methodologies and share stories about how our work individually and collectively has benefited. We hope you benefit from our insights and lessons about how to work collaboratively to accelerate learning and be inspired to try some of these techniques in your own work.

Understanding the Context of Nonprofit Leadership Development

Since many of you reading this chapter may be unfamiliar with nonprofit leadership development, we briefly discuss some of the issues that are commonly encountered in efforts to evaluate leadership development in the nonprofit sector.

Nonprofit leadership development initiatives and programs are supported primarily by public and private donors in an effort to accelerate change and solve social problems (such as healthcare access, student achievement, affordable housing, poverty reduction, racial equity), and to improve the quality of life in underserved and under-resourced communities.

The long-term changes that nonprofit leadership approaches ultimately hope to achieve may not be realized for many, many years – if not lifetimes. As a result, success in the nonprofit sector has to be evaluated

longitudinally and monitored with proxy measures of progress. This presents significant challenges because nonprofit organizations operate on very tight budgets that limit the resources available to invest in leadership development evaluation.

Most nonprofit sector leadership development evaluations are funded by foundations. As trustees of public resources, foundations bring a set of learning questions about the impact and cost of programs in which they invest. They want and need to know whether leadership investments are accelerating the desired results more effectively than other possible investments. These same questions are often ones that business leaders ask themselves about leadership development investments within the for-profit sector as they seek to determine the relative value of a program and its outcomes. Although this chapter is written about evaluation from the nonprofit perspective, our colleagues in the for-profit sector may find many similar opportunities and challenges.

A Brief History of Early Nonprofit and Philanthropic
Investments in Leadership Development and Leadership
Development Evaluation

One of the earliest nonprofit leadership development programs, Coro, was founded in 1942. An attorney and a business leader in San Francisco became concerned that there was no training to prepare citizen leaders. Coro continues to offer leaders hands-on training designed to support them to make meaningful contributions to society. Other early nonprofit leadership development efforts include the founding of the Community Leadership Association (CLA) in 1979 and American Leadership Forum (ALF) in 1980. CLA is an umbrella organization that brings together hundreds of local programs that seek to create networks of informed, concerned citizens to guide the future growth of their communities. Working and learning together, participants enhance their leadership skills, capacities and attitudes while they broaden their understanding of community issues. ALF was founded to address the need for more skillful, more ethical, more effective leadership on a local basis. Its founders were convinced that if a cross-section of a community's business, elected, academic, minority and religious leadership could be brought together to work on public issues, no problem would be beyond solution. To our knowledge, these early leadership development efforts were not evaluated.

Philanthropic investments in leadership development span over 40 years. Some of the earliest efforts were supported by the W.K. Kellogg Foundation, such as the Kellogg Farmers Study Program, created in 1965 at Michigan State University, with the intent "to provide young agricultural and rural leaders with a broader view of society, as well as a greater sense of the world and how they fit into the bigger picture" (W.K. Kellogg Foundation, 2001).

In 1966 the Ford Foundation created a Leadership Development Program to identify and support grassroots leaders from around the country to improve rural life in America. The Smith Richardson Foundation supported the founding of the Center for Creative Leadership in 1970, "to advance the understanding, practice and development of leadership for the benefit of society worldwide." The Center continues to be a recognized leader in the field of leadership development education.

From the earliest years there has been a strong philanthropic interest in documenting and assessing the impact of these programs. One of the earliest evaluations of the Ford Foundation's Leadership Development Program (1966-1977) led to the publication of *Left-Handed Fastballers: Scouting and Training America's Grass-Roots*

Leaders (Ford Foundation, 1981). Other early leadership development evaluation efforts include a study funded by the W.K. Kellogg Foundation to compare four leadership programs in Pennsylvania, Montana, Michigan, and California (Howell, Weir, and Cook, 1979).

During the past 20 years, philanthropic investments in leadership development have grown exponentially. This growth has been a response to the rapid expansion of nonprofit organizations and the recognition that the capacity of these organizations to lead change depends on strong leadership. Through foundation-funded programs and initiatives, leaders have been selected, nurtured, supported and connected with one another in order to become more effective change agents.

With this expansion came an increasing interest in assessing the impact of leadership development programs. By the late 1990s frustration was growing within the philanthropic community (and among programs themselves) about the capacity of evaluation to answer questions about impact. The Kellogg Foundation, one of the leading funders of leadership development and leadership development evaluation, commissioned a scan to find out which programs were evaluating outcomes and impact, how they were conducting these evaluations, and whether there

were any promising evaluation models for the leadership development field. The scan, "Evaluating Outcomes and Impacts: A Scan of 55 Leadership Development Programs," (W.K. Kellogg Foundation, 2002) surfaced a number of reasons why leadership development evaluations were not able to successfully answer questions about impact.

- Leadership development programs often lack a theory of change that surfaces the links between individual change and changes in organizations, communities or fields.
- The most widely accepted methodologies for evaluating impact are derived from the experimental sciences, such as randomized control experiments. In many cases, experimental methods are not appropriate for evaluating leadership development (See chapter 1 for a further discussion of experimental and quasi-experimental methods for evaluating leadership development).
- Most evaluation learning occurs within the cycle of a program grant thus limiting the breadth and depth of the knowledge that is generated.
- Few resources are invested in longitudinal evaluations that have greater potential for demonstrating leadership impact.

Because of findings like these, many funders, practitioners and evaluators believed that learning could be accelerated if they began developing more synergy among their evaluation questions, approaches, and methods.

The Value and Challenges of Learning in Community

By connecting the learning of a diverse group of leadership development stakeholders, the breadth and depth of learning increases. Stakeholders can test their findings with each other, share resources and tools, and push each other to ask deeper questions.

One of the barriers to creating a learning community is that evaluators operate in a market economy, often bidding against one another for foundation contracts to conduct leadership development evaluations. As a result, evaluators have little incentive or opportunity to collaborate or share tools or knowledge with one another, often leading them to feel isolated in their work.

A competitive environment exists among leadership programs as well. Their dependence on foundation grants often makes program staff reluctant to share what is working well for fear of losing a competitive advantage; and they are equally concerned about sharing what has not worked for fear that perceived weakness or "failure" may be

exploited in a competitive economy. The guarded behaviors that emerge in a climate of fear and anxiety often occur without conscious thought or intention and are at odds with the values and mission-driven spirit of most organizations in the nonprofit sector.

Despite these challenges, many evaluators and leadership development practitioners believed that we could build a more compelling case for investing in leadership development strategies if we could aggregate findings about outcomes and impacts across our leadership development efforts. A cross-program examination of evaluation findings might also help us determine a cost-effective minimum bundle of program elements that could achieve a program's desired outcomes. Furthermore, we believed that by working together we could validate a diverse range of complementary qualitative and quantitative methods to create a fuller picture of leadership development program outcomes and impacts and effectively build support for the use of mixed methods among leadership development program staff, evaluators and grant makers.

Our experiences suggest that, when provided opportunities for collegial and collective learning, leadership program staff and evaluators are hungry for opportunities to both deepen their own learning and

contribute to building the field's knowledge about the successful practice of leadership development and what it can accomplish and contribute to social change.

The Creation of the Leadership Learning Community

The Leadership Learning Community (LLC) was founded in 2000 by a diverse group of leadership development stakeholders, program staff, grant makers, researchers, evaluators and service providers. One of LLC's core assumptions is that it is possible to strengthen individual and collective efforts to develop effective social change leadership by connecting the resources, learning, and practice of those committed to this work. Before officially forming LLC, we tested this assumption by working together as program staff and evaluators to develop a leadership development program and evaluation framework that we felt integrated our collective wisdom. The productivity of this process reaffirmed the value of, and need for, a sustainable community of learning and practice. We formed the LLC to support and structure continued opportunities for collective learning and knowledge development. Those who joined us in launching the LLC, shared a commitment to building an open source, publicly accessible knowledge base to strengthen the leadership development field.

Mission and Values

The mission and values of LLC encourages a culture of generosity. Within the LLC environment leadership program staff, consultants and businesses have responded to the call to contribute their knowledge about effective leadership development design and evaluation to elevate the practice of the entire field. Self-organizing groups, committed to a common issue or question, experiment with and develop the tools and methodologies that can support collective learning and knowledge generation.

Learning Circles

The LLC primarily organizes learning through Circles. Circles are “places where people... talk, celebrate, problem solve, sing and tell stories, and ... govern themselves” (Pond and Nielson, 2004). As the authors of a recent external evaluation of LLC reflected, “ultimately the creation of these spaces [circles] is intended to help unfold creative social change agendas and strategies that are rooted in community and collective action” (Pond and Nielson, 2004).

LLC has found that learning is best supported in three types of Learning Circles, all of which are populated by those with an interest in learning more about how to

evaluate leadership development: Regional Circles, Affinity Circles and Issue-Focused Circles.

Regional Circles. These circles are organized to bring together a diverse group of funders, service providers and researchers who live in a particular geographic area. Proximity to one another makes it easier to gather more frequently, build relationships with one another across a variety of perspectives and work domains, and learn together around issues of shared concern.

Affinity Circles. These circles bring together people based on a shared role, such as being a funder of leadership development efforts, or working in the field of health leadership development. The unique challenges of working within certain environments and the lack of opportunity to convene with colleagues who share those challenges, make the opportunity to have a candid and open conversation about common concerns, highly valued. While LLC encourages dialogue among diverse groups, some topics may be more fruitfully explored with those who have had similar experiences. For example, the meeting of the health affinity circle enables evaluators to look across the findings of multiple health focused leadership efforts for synergy and leveraged impact in health outcomes.

Issue-Focused Circles. Issue focused circles convene around topics of interest to the community, such as evaluation and alumni network-building. These circles have the advantage of consistent, deep focus that supports problem solving, tool generation and direct application. The LLC Evaluation Learning Circle has been critical to our ability to generate knowledge as a community of practitioners because we depend largely on the capacity of each participating program to successfully identify what is working and not working in their own leadership development practice. The ability of the Evaluation Learning Circle to develop and disseminate tools that strengthen program learning lays the foundation for extracting important knowledge from front line practitioners. We will discuss the work of the Evaluation Learning Circle in more depth later in this chapter.

In addition to circles, LLC has also developed a contract management model that generates learning and addresses financial obstacles to collaboration common among evaluators. For a description of the contract management model and an example of its use, see Exhibit 17.1.

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An In-Depth Look at Learning Circles

A Learning Circle brings together a group of people in a process of mutual support and collective inquiry to explore issues, questions and themes that are of mutual interest to the group and who are poised to advance the practice of participants and the field. Learning Circles are based on several premises:

- Knowledge can be generated collectively that is not accessible to participants individually;
- Lessons extracted from one discreet experience may have transferable value beyond a specific context; and
- Knowledge generated collectively has the potential to strengthen the leadership development work of participants individually while contributing more broadly to the effectiveness of the field.

Learning Circles work best when people have burning questions they really want and need to find answers to, and when they feel isolated or frustrated about what they have been able to learn on their own. Learning Circles are particularly useful for cross-program learning in fields of practice where there are not well-established venues for collecting, generating and disseminating learning. Such is

the case with leadership development evaluation. Often, knowledge exists in pockets, here and there, but there is no process for bringing that knowledge together and exploring what can be learned from this synergy.

In LLC, Learning Circles are used to generate and disseminate our collective knowledge about leadership development practices, outcomes, and impacts. Learning Circles may be used to achieve other results as well, such as empowering communities to create changes that improve quality of life or facilitating learning across silos or teams within organizations to enhance services or products. For some tips on what to consider when initiating a Learning Circle, see Exhibit 17.2.

[[EXHIBIT 17.2 goes here]]

A Case Study of the Evaluation Learning Circle

A brief history

Since the founding of LLC, there has been an interest among Community members to:

- discuss evaluation with a diverse group of stakeholders including those who fund, run, and evaluate leadership programs;
- share resources and tools so that “we do not continually reinvent the wheel;”

- explore methodological, political, and longitudinal questions we have about leadership development evaluation that usually cannot be explored in the context of short-term program evaluation; and
- create knowledge that is based on mining data across multiple programs.

A list of Evaluation Learning Circle Projects may be found in Exhibit 17.3

[[Exhibit 17.3 goes here.]]

The first LLC gathering of leadership development evaluators occurred in March 2000, when about 15 funders, evaluators, and practitioners developed a four-quadrant model that integrated leadership development evaluation and programming. The model encouraged learning and reflection about the individual and collective outcomes that occur for people as they engage in a leadership development process that seeds changes and transformation over time. Using this model we mapped outcomes that leadership programs frequently seek in each of the four quadrants (see Figure 17.1).

In November 2000, the Evaluation Learning Circle engaged a broader group of stakeholders to identify challenges and questions we had about evaluating leadership

development. We created a question-based discussion guide about the politics of evaluation, program theory and evaluation, evaluation planning and design, measuring outcomes and impact, dissemination and communication, and utilization and application (see Exhibit 17.4)

[[Exhibit 17.4 here.]]

By disseminating these questions to those with an interest in strengthening leadership development evaluation efforts we began to build a shared framework of inquiry about evaluation in the context of leadership development.

In 2003, the Evaluation Learning Circle convened 30 funders, practitioners, evaluators/scholars/researchers and thought leaders to explore the benefits and drawbacks of creating a shared learning agenda. We invited participants from the Sustainable Leadership Initiative, a project funded by W.K. Kellogg Foundation and USAID to design and test a leadership development evaluation tool, to highlight their work and their use of an open systems approach to evaluate leadership development. The Sustainable Leadership Initiative grew out of an effort by leadership development evaluators in the field of public health to strengthen their evaluation practice by developing and testing a tool that eventually became EvaluLEAD (see chapter 3). While no shared learning agenda emerged from the meeting, the

participants did express a commitment to continued collective learning (see Exhibit 17.5 for reflection on the process of creating a shared learning agenda).

Exhibit 17.5 here.

To engage in meaningful collective learning requires consistency and duration. To deepen the quality of learning relationships, Evaluation Learning Circle participants meet at least twice a year, for a day-long session and a half-day session at Creating Space, LLC's national gathering. Activities have included hands-on practice with evaluation tools, such as "A Guide to Evaluating Leadership Development Programs" (Evaluation Forum 2003) and EvaluLEAD (Grove, Kibel, and Haas, 2005). These two approaches, while different, each support programs to be more intentional about what they are trying to achieve and how to evaluate their outcomes (Hsieh 2003). Consistent with what we have learned about good leadership development, having the opportunity to apply concepts in practice deepens learning and makes it more likely that people will be able to use what they have learned on their own. Both the Evaluation Forum's Guide to Leadership Development Programs and the Sustainable Leadership Initiative's EvaluLEAD Guide are posted in the Evaluation Knowledge Pool on LLC's website.

One of the challenges for any Learning Circle, whose members are scattered around the country, is how to effectively combine the use of virtual learning and face-to-face interaction, which is often very limited. The Evaluation Learning Circle developed a "shared inquiry process" to support those with shared interests to surface learning from their work, and share it virtually in advance of meeting face-to-face.

For example, there were a number of Learning Circle participants who were interested in exploring how to evaluate personal transformation, and what connections, if any, there are between personal transformation and organizational and community transformation. For many evaluators, personal transformation is among the most profound, yet illusive, outcomes of leadership development programs that they seek to document and understand.

In order to use face-to-face time together effectively, participants were asked to commit to surfacing their own learning in advance using one of several methods: taking a retrospective look at data about personal transformation that they had already collected through their evaluations, gathering new data, or conducting a literature review. We provided participants with a list of questions to guide their inquiry such as:

- What do we mean by personal transformation?
- What are indicators of personal transformation?
- How do leadership development efforts support personal transformation?
- How do we evaluate personal transformation and its links to organizational and community transformation?

Participants were then asked to respond to these questions in writing and submit their responses via email. We compiled the responses and shared them with the inquiry group before our day-long gathering. An analysis of the responses created a framework of understanding that was then tested when the group met. A series of facilitated exercises deepened our collective understanding about the questions that were posed (LLC Evaluation Learning Circle, 2004).

We emerged with a framework that reflected people's collective understanding about the types of changes that indicate personal transformation has occurred. They include changes in thoughts and feelings, changes in behavior, changes in interaction, and changes in collective action. Once we had this framework we recognized (or at least hypothesized) that it might be applicable to other domains of transformation (organizations, communities, fields, and systems). We also realized that change is not

a linear process that begins with changes in thoughts and feelings progressing to collective action, rather the process of change can begin in any of these dimensions. For example, someone might become involved in a community organizing campaign through which they clarify what they really care about and believe. Beliefs and values, in other words, do not need to precede collective action. The fullest potential of transformation requires change in every dimension but there is no order in which this has to happen. We were excited about generating an approach to understanding transformation that was a product of evaluators surfacing individual lessons that were enhanced by learning in community.

During our face-to-face meeting a group of participants with a shared interest in community leadership development became interested in sharing their theories of change. They wanted to deepen their collective understanding about how to support and evaluate community leadership development. This group organized a more focused follow up meeting to explore how community leadership programs recruit and select participants, how they support connectivity among participants and in communities, what outcomes they seek in the short term, intermediate term, and long-term, and how to align program

outcomes with program activities. The meeting was attended by grant makers who each brought an evaluator that had worked with the community leadership programs they were funding. Participants at this meeting created a shared list of resources that have most influenced their thinking about communities, leadership and change, program design, and evaluation (LLC Evaluation Circle, 2005).

One of the group activities was identifying each program's short-term, intermediate and long-term outcomes on pieces of paper that were then posted on a "sticky wall." After the meeting, we analyzed and categorized these collective outcomes using the categories of changes in thought and feeling, changes in behavior, changes in interaction, and changes in collective action that we had developed at our earlier gathering. We disseminated this analysis to those who participated in the community leadership development gathering and invited them to join us in a conference call to test the validity and relevance of the framework. While data has not been collected from participants about how they have applied what they learned, the systematic process of gathering data, creating a framework, and testing that framework against the experiences of diverse stakeholders appears to be a

promising methodology for deepening knowledge about the leadership transformation process.

As you can see, our learning process is dynamic and emergent. Because initial efforts to create a learning agenda to guide collective work did not meet the needs of the learning community, (see Exhibit 17.5) we moved towards exploring issues around which there is collective momentum and interest. We look for synergies in what we are learning along the way, and seek opportunities to test and deepen our emergent knowledge. We have found that participants are willing to engage in virtual learning exercises designed to maximize the synergy and productivity of the learning that occurs in face-to-face time.

Becoming a Resource to the Leadership Development

Evaluation Field

The LLC learning community of leadership program staff and evaluators has become a resource for the field. For example, the LLC was tapped for a research project on how 55 leadership programs evaluate their outcomes and impacts. The most frequent leadership outcomes for individuals, organizations, communities, fields, and systems may be found in the appendices to the scan, *Evaluating Outcomes and Impacts: A Scan of 55 Leadership Development Programs*

(W.K. Kellogg Foundation, 2002). In addition, LLC worked with the Sustainable Leadership Initiative to recruit programs that could field-test the EvaluLEAD guide. The field-test process strengthened the community of leadership development practice and contributed to improving the usability and relevance of the EvaluLEAD guide.

Disseminating Evaluation Learning

One of our most deeply held commitments as a learning community is to share tools, resources, and knowledge with each other so that we can accelerate learning and increase the quality and use of evaluation findings to strengthen the practice of leadership development. On the LLC website we disseminate evaluation reports, guides, and tools that LLC community members have developed, and which may be valuable to those in the field of leadership development evaluation and to program staff who are trying to develop their internal capacity for continuous learning. We have also created a Handbook link that lists all available resources reference in this book.

We always synthesize and share the learning process and outcomes from Circle gatherings. We consider these Circle syntheses as works in progress because they capture questions, visions, and learnings at one point in time.

Waiting to share only "polished products" can stifle the exchange of valuable information and insights in favor of a more labor and cost intensive monograph that may not fully capture the learning that has evolved during the production process. It is our opinion that sharing work in progress accelerates the exchange of ideas and invites others to use and build upon this work more quickly.

We have begun to experiment with web based commentary vehicles that enable readers to respond to, and comment on, Circle notes to expand and deepen learning. Reports, rather than being static documents, are used to catalyze additional reflection and learning. In whatever ways we can, we seek processes that continually generate new knowledge.

We are still discovering ways to support dissemination face-to-face and through the Internet. One promising direction is modeling and documenting the Learning Circle process so that people can adapt it to their own settings to create new evaluation communities of learning and practice. By disseminating the process of learning (not just the results), capacity for generating knowledge grounded in experience, reflection, and mining of collective wisdom has a much greater opportunity to expand.

Assessing Circle Outcomes and Impacts

In a recent evaluation of the Leadership Learning Community, the Evaluation Learning Circle was recognized as a "leading knowledge developer in the area of evaluation." The external evaluators commented that the Circle "plays entirely to LLC's strengths and niche: it is cross-sectoral, conceptually subtle and sophisticated while being informed by grassroots and practical inputs, the product of self-organizing and collaboration, and is being shared with the broader field at every step in its development and elaboration. The evaluation circle is an illustrious example of LLC's potential and achievements relative to its mission and vision."

While these remarks about the Circle were gathered from surveys and in-depth interviews, there has been no systematic effort to capture how participation in Circle projects and gatherings has influenced the evaluation of leadership development on a broader level.

We do have evidence that about one-fifth of all visitors to the LLC website visit the Evaluation Knowledge Pool. While this is encouraging we do not know how visitors use the information they find. This would require more systematic tracking of those people who come to the site.

The strongest evidence of impact is in the relationships and bonds of trust that have been created and deepened through Circle work, and some of the projects that have developed or been enhanced as a result. In fact, without the work of the Circle, it is doubtful that many of the authors in this book would have been aware of each other, or for that matter that the editorial collaboration between CCL evaluation staff and the LLC's Evaluation Circle Convenor would have developed. Both the editors and many of the authors met and/or deepened their relationships with each other through Evaluation Learning Circle gatherings.

The collaboration on the book project was initiated after Creating Space in May 2003. At the Evaluation Circle gathering later that year, we began discussing the book project with several people who became contributors to the book. We generated excitement about the contribution this book could make to the field and affirmed the value of the work that people were doing. Because many of us knew each other through the LLC Evaluation Learning Circle, the commitment we made to participate in this project was both personal and professional. In addition to the Evaluation Learning Circle, there were other venues that contributed as well, including the Leadership Evaluation Advisory Group

that was a learning community that supported the development of EvaluLEAD, and the American Evaluation Association Topical Interest Groups where leadership development evaluators have met each other and strengthened their connections.

It is much more difficult to determine if participation in the Learning Circle has improved the quality of leadership development evaluation in the nonprofit sector. We have collected some individual stories. For instance, one Circle participant, inspired by the process of cross-program learning that the LLC Evaluation Circle was using, sought funding to bring together three leadership development programs she was evaluating, each of which focused on personal transformation. These three programs worked together to define what they each meant by personal transformation and to see where they had common and divergent understandings. They explored how to recognize when personal transformation was occurring, and what they were learning about how best to support personal transformation. This process of cross-program learning deepened their collective understanding about what they were trying to achieve, and how best to achieve it (see Chapter 7).

LLC may want to more systematically collect stories about the value that is created by participating in Circles. Focusing on value creation will not only enable us to document outcomes, it will also accelerate our learning about how to create value through Learning Circles. For a description of what participants say they like about being part of the Evaluation Learning Circle, see Exhibit 17.6.

Exhibit 17.6 here.

Challenges of Generating and Disseminating Knowledge
There are challenges to generating and disseminating knowledge, beginning with how we think about and conceptualize knowledge itself. Knowledge is not static. It is "an accumulation of experience -- "a kind of 'residue' of actions, thinking, and conversations -- that remains a dynamic part of ongoing experience" (Wenger, McDermott, and Snyder, 2002). Knowledge, in other words, lives in communities of practice. Communities of practice are defined as "groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis (Wenger, McDermott, and Snyder, 2002).

Creating vibrant communities of practice is key to generating useful and meaningful knowledge. A vibrant community creates a shared vocabulary and core knowledge base that enables it to explore ever deeper and more complex questions. At the same time, a vibrant community is inclusive of multiple perspectives and experiences that enrich the body of knowledge and challenge "truths" that may be relevant to only one set of experiences. Stewarding a community of practice means holding these two needs in balance.

Perhaps one of the greatest challenges we face is how to disseminate knowledge beyond those who are active participants in its generation. There are both product and process challenges in this effort. We are learning, for instance, that tools that provide a step-based approach to evaluation embed knowledge that will emerge when people apply the tool. This seems to be an effective way to disseminate knowledge because people want tools they can use to make their evaluations easier and better. While some people will pick up a tool and apply it, thus enhancing their learning and knowledge in the process, other people, hesitate to use a tool unless they have a community or peer relationship to support them to try something new. These peer resources are more easily accessed through a learning

community, as was clearly demonstrated with the EvaluLEAD field-test process.

The effective dissemination of knowledge requires a collective effort of all those who participate in generating knowledge to expand the people with whom they share knowledge. This is the ripple effect of knowledge generation in which the spread of knowledge accumulates over time. Knowledge that is most valuable and useful will likely spread faster than knowledge that is not. After all, the validation of knowledge is ultimately in its ability to illuminate connections and provide insights that lead to improved practice.

Envisioning Leadership Evaluation Ten Years From Now
So what is the collective vision of leadership development evaluation that is emerging from the Evaluation Learning Circle? Where do we want our practice and learning to go? We asked Evaluation Learning Circle participants to envision leadership development evaluation ten years from now to explore the ways in which our roles and profession may need to change. Some of the insights that emerged from this exercise seem valuable for all of us to consider as we continue to engage in evaluating leadership development.

Here is a narrative summary of our vision that was captured in the 2005 Circle Session Notes:

Evaluation is shifting from a process that is primarily external and conducted by consultants to a process that is integrated into the fabric of our thinking and the structures and processes of our work. Evaluation learning occurs in real time. We begin developing the capacity to evaluate at a very young age. We no longer think of evaluation as something that is done to us, but rather something that enables us to develop deeper understandings about our impact, and clarity about what is working or not to support the changes we want to see. Evaluation becomes more democratic.

Our methodologies for learning are expanding dramatically. We no longer rely only on the sciences and social sciences for our evaluation approaches and methods. We recognize the power of creativity to open up worlds of knowledge that were not accessible before. We are much more sophisticated at using pictures, art, stories, and videotapes to reveal what is occurring in between words, in spaces, and in our body

language. We no longer have to make the case for the validity of these methods. Technology has created access for many more people to document and interpret their experiences. There is a proliferation of knowledge.

The process of synthesizing and making sense of our knowledge, and engaging others in those conversations is core to accelerating change. There is urgency about this because we need more and more investments in change leadership if we are going to have the capacity to solve our problems and create a better future. We need a shared framework and understanding, grounded in and relevant to diverse cultural perspectives and experiences, in order to move forward together. Leadership development evaluation is a valuable vehicle for engaging in these conversations.

Areas for Further Learning and Exploration

The Leadership Learning Community and the Evaluation Learning Circle continue to explore a number of questions.

- What is the minimum bundle of leadership development program elements that seed change in individuals, organizations, communities, fields, and systems?

- What are we learning about how to effectively use storytelling, case studies, and scenarios to place facts in context and give meaning to what we are seeing, hearing, and dreaming?
- How do we make evaluation more accessible and less costly? Can we use new technologies to democratize evaluation?
- What is the extent and strength of networks needed to foster individual, organizational, and community change? How can we better analyze social networks?
- How do we most effectively use evaluation as a tool for transformation and evolution?

In addition to these questions we are also challenging ourselves to integrate and synthesize what we are learning about effective leadership development practices that catalyze and seed positive change, and what the outcomes of these practices are. This effort will expand our shared knowledge base and make a stronger case for what we have learned. At the same time, however, we recognize the dangers of this quest. Knowledge may become detached from the source of its learning and lose its dynamic character. It may come to be seen as standing above practice at which point it loses its usefulness. As a community we will continue to work with this tension, finding ways to

establish a baseline of shared knowledge and honor context and complexity.

Conclusion

As we continue to learn more about how to evaluate leadership development, we need to pay attention not only to what we learn as individuals but what we are learning as a community and a field. We invite you to join the Leadership Learning Community to shape the field of the future and improve our collective capacity to develop and support leadership that can accelerate positive change in our world. While some of you may work in the for-profit rather than the nonprofit sector, the LLC offers an opportunity for deeper connection and learning that is still valuable and useful to you. This book is a catalyst for a cross-sectoral conversation about leadership development. It is up to us to continue it. The synergy that might be created through this cross-sectoral exchange could well enhance the usefulness of all our evaluation efforts, and accelerate changes that neither sector will realize alone.

Resources

Leadership Learning Community

The LLC website may be found at www.leadershiplearning.org.

The site connects learning partners through an accessible leadership development program directory, shares resources through the knowledge pools, and has developed tools to support virtual learning activities. The Evaluation Learning Circle's Knowledge Pool may be found at

www.leadershiplearning.org/pools/evaluation

We invite and encourage you to read Circle notes and become part of the learning process. Visitors to the site can join the Evaluation Learning Circle by sending us an email. You can upload your own resources in the Community Contributions section. Any visitor to the site can download anything freely. We believe learning will be accelerated through an open source environment

Several LLC members held a Circle to reflect on what supports the process of effective learning in communities. A synthesis of this conversation is entitled, "Facilitating Learning Conversations and Communities" (Allen 2002).

Popular Education

Paolo Freire and Myles Horton, *We Make the Road by Walking: Conversations on Education and Social Change* (1990).

Paolo Freire led a movement for democratic education in Brazil, and Myles Horton, a founder of the Highlander Center in the Appalachian region of Tennessee developed Citizenship Schools in the early years of the civil rights movement. This book offers an intriguing dialogue between Paolo Freire and Myles Horton that includes a chapter on educational practice that is instructive about how to create an effective learning environment among adult learners.

Communities of Practice

Etienne Wenger et al., *Cultivating Communities of Practice* (2002)

This book provides practical models and methods for stewarding communities to reach their potential and sustain their inner drive.

Meg Wheatley, "Supporting Pioneering Leaders as Communities of Practice: How to Rapidly Develop New Leaders in Great Numbers" describes this process (Wheatley 2002).

This article discusses how to use a "communities of practice" approach to develop leaders. Meg Wheatley is founder of the Berkana Institute. The Institute initiated a global leadership initiative to organize on-going circles

of leaders in local communities across the world, and then connects these local circles into a global community of life-affirming leaders.

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Exhibit 17.1

A Collaborative Contract Management Model

Diverse teams of experts are recruited from the community to deepen collaborative learning through consulting opportunities that often focus on evaluation and scans of leadership development practices. This model builds evaluation capacity by supporting higher levels of collaboration and peer learning among field experts. Often these experts accept less compensation in order to participate in a collaborative learning experience. One such collaboration was pulled together to evaluate three leadership development programs that were part of a ten-year Violence Prevention Initiative. The team included a biographer, a community leader committed to working with disenfranchised youth and adults to develop their leadership, a programmatic expert in the field of nonprofit leadership development, a public health program evaluator, a leadership development program evaluator, and a project manager. The diversity of this team improved the quality and relevance of the evaluation questions, ensured the use of appropriate data collection methods, and produced a report that was rich with stories and solidly grounded in leadership development program practice and theory.

Leadership development evaluators engaged in joint learning develop an appreciation for one another's particular areas of expertise and form stronger relationships. These experiences can seed collaborative projects that pool new combinations of expertise and perspectives to accelerate learning. For instance, a core group of team members from the Violence Prevention evaluation formed a collaborative team with another colleague who had international development evaluation experience in reproductive and maternal health to evaluate six family planning and reproductive health leadership programs.

Exhibit 17.2

What to Consider When Initiating a Learning Circle

- *Create a culture of sharing based on common mission and values.* It is important to balance concerns about real and perceived competition people feel with each other with a higher commitment to strengthening all leadership development efforts. Allowing enough time to build relationships of trust and creating ground rules increases the comfort of participants.
- *Invite diverse stakeholders to participate.* Diversity is critical to the quality of the knowledge that is created. What constitutes diversity will vary by context, but every effort should be made to include people who do not normally have an opportunity to reflect and learn together.
- *Take time to deepen the questions that are being asked before exploring the answers.* The process of asking deeper questions often surfaces those questions that are most compelling and at the edge of current knowledge. Learning Circles are more likely to hold the attention of participants when they are exploring the questions that matter most.
- *Engage people in a process of inquiry before meeting face-to-face.* Deeper learning occurs when people have

engaged in their own learning process before coming together to share with others. This is particularly important when opportunities for face-to-face meetings are time limited.

- *Good facilitation is a key to success.* Two elements of facilitation are particularly important: designing a variety of learning activities to tap different learning styles and synthesizing the collective learning that has occurred so that people recognize what they learned together and can contribute to the field.

- *Document and disseminate the collective learning.*

Learning is a cumulative process that builds on itself. Documenting the learning that occurs makes it accessible to people who may not have participated in the process but who can still benefit from what was learned.

Documentation also provides participants with a synthesis that enables them to engage in further reflection and gain new insights beyond those they had when they first participated.

Exhibit 17.3

LLC Evaluation Learning Circle Projects (2000-2005)

- The development of a leadership evaluation and programming model. (LAMPS: A New Four Quadrant Tool and LAMPS: Powerpoint Presentation)
- The mapping and categorization of leadership development program outcomes across programs. (Outcomes Across Leadership Programs)
- A compilation of resources for evaluating leadership outcomes for individuals, organizations and communities.
- A guide to participatory evaluation resources. (Participatory Evaluation Resource Guide)
- The exploration of personal transformation and its links to organizational and community transformation. (Exploring Personal Transformation and Its Links to Organizational and Community Transformation)
- The creation of a leadership development evaluation vision for ten years from now. (Illuminating the Interconnections between Personal and Community Transformation Through Evaluation and Cross-Program Learning)
- The creation of a leadership development evaluation knowledge pool with leadership development evaluation

reports, evaluation tools and guides, and cross
program evaluation learning materials

Learning from all the above projects and more may be found
in the LLC Evaluation Knowledge Pool. You may look for the
titles in parentheses.

Exhibit 17.4

A Discussion Guide about Leadership Development Evaluation

The politics of evaluation

- Why are we doing evaluations? What is the larger purpose?
- For whom are we doing evaluations and how does that affect what questions we ask and the methods we use?
- How do programs act as a catalyst within foundations? Are we "walking our talk"?
- Is a given program really necessary? Is it meeting a real need?
- What don't we ask that we should be asking?
- What are we afraid to ask because we don't know what to do with the answers?
- How do we manage the power relations that are inherent in evaluation?
- Who's going to evaluate our evaluations?

Program theory and evaluation

- What is the importance of having a coherent theory of social change for programming and evaluation?
- What do we know about leadership transformation?
- What will it look like if this program is effective? How will we know that?

- How do I know that what I am doing will get me to some result I want?
- How do we know that particular programs are making a difference for individuals, organizations and communities?
- What works? What doesn't work?
- What are best practices in the field?

Evaluation planning and design

- What are models that address different evaluation needs, audiences?
- What are indicators for readiness for participation in programs?
- How do formative evaluations inform summative evaluations?
- How do you structure an evaluation?
- How can we use the evaluation to build the reflective capacity of participants?

Measuring outcomes and impact

- How can we evaluate the benefit of investing in an individual to their community?
- How do we measure leadership practice instead of position?
- What's the return on investment for individuals and in turn for the community?

- What are the prevailing outcomes from fellowship programs?
- How are outcomes measured?
- How do we evaluate the impact of leadership development programs?
- How can we develop indicators for social impact (transformational leadership) when most significant change takes place over decades?

Dissemination and communication

- How do we create short-term evaluations with a long-term message?

Utilization, and application

- How can the lessons from the evaluation of individual leadership programs be captured for broader dissemination and application?
- How can the lessons from leadership development programs be applied as a cross cutting theme to other areas of foundation grant making?

Exhibit 17.5

Reflections on the process of creating a shared learning
agenda

"Creating a shared learning agenda is a complex process. It is not simple to figure out what questions we are asking in common, and then set out to answer those questions. We bring vastly different learning needs to the discussion based on whether we are funders, practitioners, scholars, evaluators, or participants in leadership programs. Furthermore, we do not have well-developed approaches or methodologies for evaluating leadership development that are widely recognized as useful and valid. We have few ways to systematically capture and organize what we are learning. What we do have is a deep and abiding interest to continue working together to find a common language and to test and refine our approaches and methods so that we can all have more confidence in what we are learning." --

An Excerpt from the 2003 Circle Session Notes

Exhibit 17.6.

Benefits of Participation in the Evaluation Learning

Circle: What Participants Say They Like

- Being part of a community that values learning more than competition.
- The acceleration of learning that occurs when diverse stakeholders participate.
- The ability to make a more persuasive case for investing in leadership development and leadership development evaluation.
- Reducing the sense of isolation by connecting with others and confirming that the challenges we face individually are the challenges we face collectively.
- Having an opportunity to explore deeper questions that cannot usually be asked (such as what do we mean by personal transformation and how is it linked to organizational and community transformation.)
- Being exposed to new methods, tools, approaches, and ideas.
- Having time for reflection.
- Imagining together how we want leadership development evaluation to evolve.
- Contributing to building the knowledge of the field.