



Reflections and Learnings: The Berkana Institute & Connective Associates LLC Seed Fund Project

What we said . . .

The intention of this project was to learn about how the tools of social network analysis could be of use in evaluating collective/emergent leadership networks. The Berkana Exchange was used as a case study. We chose to focus on the Art of Learning Centering gathering because we believed that it would give the project a somewhat narrower scope, rather than looking at the whole Exchange community. We were interested to see if SNA could be useful in understanding the conditions that need to be present in a gathering like this to demonstrate that learning was happening as a result of participation. We were also initially interested in exploring the idea that SNA tools might be useful to share learnings from the gathering with other members of the Exchange that did not attend the AoLC.

This project was particularly interesting because of some of the challenges faced in using SNA to evaluate collective leadership networks, as noted in the article *Social Network Analysis and the Evaluation of Leadership Networks*.¹ In a meeting with the LLC community in Boston in July 2008, we received feedback and were encouraged to be clear about what we were hoping to learn and how it would benefit the Exchange community. One comment, in particular, stands out in my memory: “Until there’s a better understanding of the value of this kind of evaluation by the whole community, perhaps you should not begin to create hypotheses and test them.” Within this statement, we can find the crux of both our challenges and learnings.

What happened . . .

Naming Our Inquiry

Two months before the AoLC gathering we said that the actual purpose of this inquiry was *to demonstrate that learning centers’ participation in a trans-local learning community ultimately transforms the health and resilience of their local communities*. But we recognized a constraint in this purpose: The Berkana Institute cannot be the ones measuring or demonstrating this transformation, because this is the work of the local learning centers. It would be inappropriate and likely ineffective if Berkana were stepping into the middle of learning centers relationships with their partner communities. We made a choice to use the AoLC gathering as a proxy, to test our ability to measure or demonstrate value by looking at the activity in which we collectively invest the most. We decide to use a practice-based approach, paying attention to the different tools we offered each other and used at the gathering (e.g. processes for surfacing collective intelligence, structures for fulfillment, hosting and facilitation tools). We could then measure how much these tools were being used once participants returned home to get a sense of the impact that participation in the AoLC had on learning centers.

Pre-AoLC Interviews and Survey of Practices

¹Bruce Hoppe and Claire Reinelt, *Social Network Analysis and the Evaluation of Leadership Networks*, 19 Jan. 2009, 23 May 2009 <<http://leadershiplearning.org>>

fulfillment included everything from hosting gatherings and learning exchanges to creating wikis and virtual portals for connecting.

Significant Shift for the Community

During the 2008 AoLC gathering The Berkana Institute's role as the convener and catalyst of the Exchange community shifted significantly. The Institute made the declaration that while we would continue to be involved in and support initiatives growing out of the Exchange, we would cease to be the primary funding or catalyzing entity for the trans-local community. It signaled a shift to a more self-organized and autonomous form. Many participants returned home with a transformed sense of the nature of this community and the possibilities for the future.

Post-AoLC Interviews

When we returned from the gathering, we reevaluated what it was that we wanted to learn from this process, given what had transpired in Zimbabwe. We decided that there were two main areas for learning: the value of individual participation in the gathering and the health of the community. We organized the next phase of the process around the following two questions:

- What LEARNING occurred at the 2008 Art of Learning Centering?
- Did you ACT on the promises and possibilities created at the 2008 Art of Learning Centering?

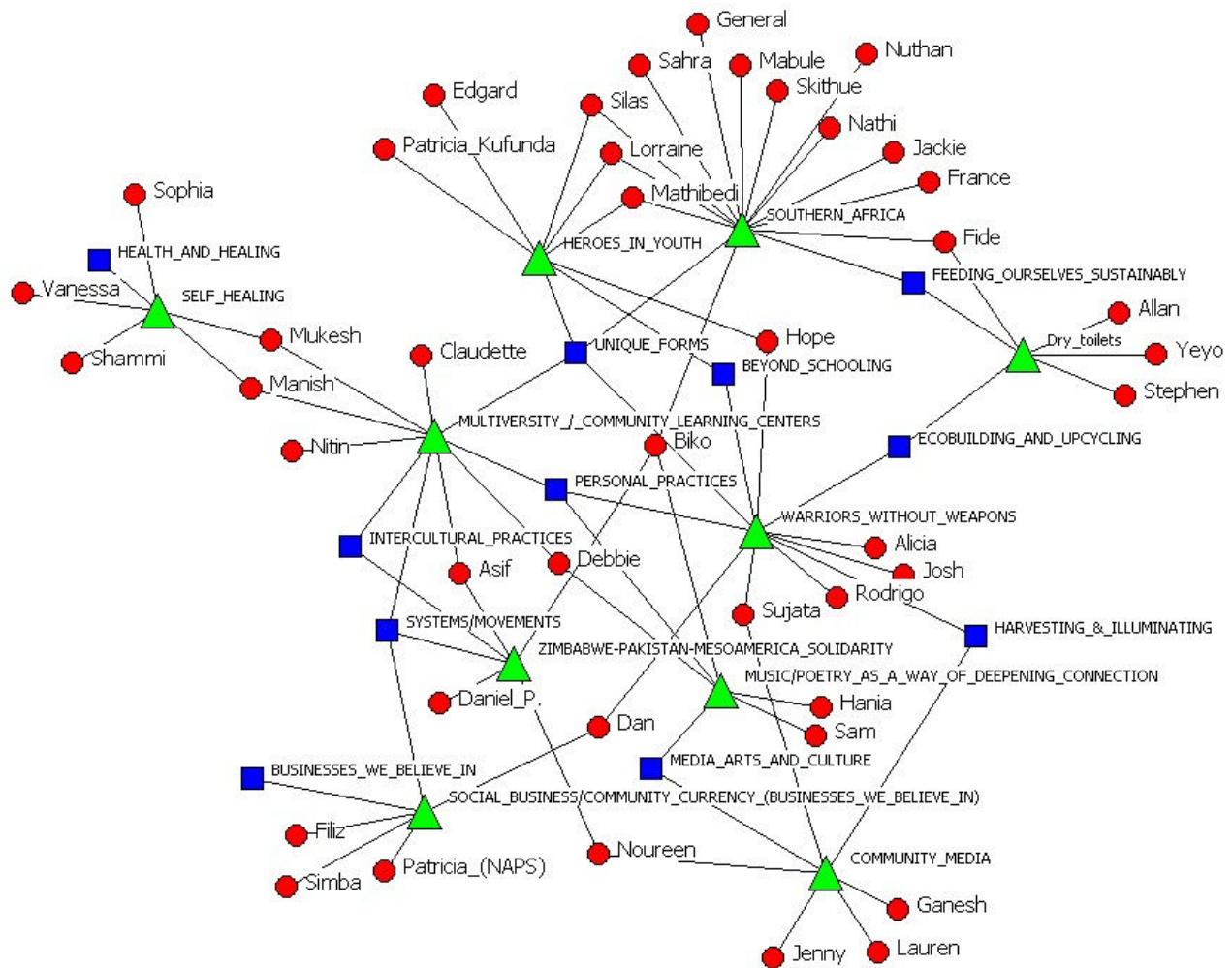
We designed a post-AoLC interview to address these questions and convened a group of six community members to help us conduct the interviews. The purpose was to gather information about the most powerful learnings for participants, as well as to check in with the Action Groups to find out if they were using the structures for fulfillment named during our time together and engaging in collective action.

Practice Popularity Lists

As we designed and conducted interviews, we worked with the lists that Bruce had generated from the AoLC survey to see if there was significant learning that we could work with and share with the community. The practices were organized according to popularity into two documents about learning interests and offers. Along with the lists of practices, were the names of individuals who said they had something to offer in each area. We thought that these individuals might be used as resources for the community in learning more about a specific field of practice. The other objective was to illuminate the places where we, as a community, had the highest learning interest and the practices where we collectively had the most to offer. We shared the data with the community by e-mail and asked if anyone found it interesting or useful.

Mapping and Naming Resources for Action Groups

We also worked with the survey results by looking at the different practices from the surveys that might be associated with each Action Group. We identified individuals who said that they had something to offer in one or more of these practices. Bruce created a map of the Action Groups showing the members of each group and the related practices (see below). We also created lists of individuals who said that they had something to offer in at least one practice related to the group and sent these lists by e-mail to Action Group members.



Post- AoLC Survey

The final step we intended to take was crafting an online survey for AoLC participants. We planned to look at the themes and patterns from the interviews, as well as the lists of popular practices to refine our understanding of the community’s learning interests and resources. We also planned to use the post-AoLC Survey to find out if collective action was occurring around the Action Groups. However, we realized that we weren’t exactly clear about the need for the surveys, nor about what we would do with the data generated. While we believe that the results of such a survey could potentially generate an understanding about the value of participating in the Exchange and the current health of the community, we recognize that no one in the system has a burning desire to figure out how this data could be refined into knowledge that we could work with to further advance our learning.

What we learned . . .

Involve the Community

One of my biggest learnings from this project has been around the importance of involving the community in the evaluation process from the very beginning. While the Berkana Exchange has been talking about measurement and evaluation for several years, our community was not initially engaged in crafting the inquiry. The process was not something that arose out of an explicit need from *within* the community. From the beginning, the Berkana staff felt a need to be somewhat careful in the way

that we approached this process, making sure that participants in the Exchange didn't feel like they were the "subjects" of a study. We did not want to reproduce dominant paradigm power dynamics in terms of Global North/Global South relations within this community that demonstrates a high degree of trust and friendship.

I found that I often held back from communicating about the process and goals of the project. Many times, I struggled to find language that would build bridges between what we were doing with the LLC Seed Fund and the Exchange community itself. Translating data coming out of the survey process and the network maps into meaningful information for the community was a challenge, because there was not much prior communication about the context for this data. I am curious to know if others have been successful in demonstrating this that this type of process is valuable to a community like the Exchange and, if so, what tools have been used to analyze and communicate learnings using SNA tools. I believed that we could integrate the LLC evaluation process into the design and hosting of the gathering. It wasn't until after the AoLC was over that we asked the question: who else might be interested in looking at this question of evaluation using this set of tools?

Learning from the Survey Process

We learned a great deal by surveying one another at the AoLC, though not necessarily about practices we are most passionate about. We could have fine-tuned the survey and perhaps only included broader categories, like Feeding Ourselves Sustainably or Eco-building and Upcycling, as opposed to including each practice mentioned during the Pre-AoLC interviews. We also could have limited the survey to other key themes from the interviews. We learned that there were varying ideas in the Exchange community about the meaning of many of the terms used in the survey. Participants from different cultures and learning centers may have different definitions of terms like "Harvesting Learning" or "Working with Councils." Some participants may not have been familiar with certain terms at all, such as "Co-Motion Approach" or "Walking Out." What we found was that the surveys provided a great opportunity and tool for participants at the gathering to get to know each other and each other's work. In this case the narrative results, such as the stories and conversations that emerged from the process, may have been more significant than the quantitative data.

In reviewing the article about SNA and evaluation of leadership networks, I feel that some of the challenges mentioned in the section about collective leadership networks are particularly relevant to the survey we created. We could have given people the opportunity to rank their level of interests in the practices. In framing the survey during the gathering, we failed to mention that we wanted to know what people were interested in learning about and offering *during* the AoLC itself. Finally, it may have been more useful to ask what practices people were *willing and able* to dedicate their time and energy to, rather than merely asking about interest.

I also have questions about the soundness of the data that we gathered from the surveys. There were approximately 50 participants at the gathering, 18 of whom were interviewed beforehand and 33 of whom took the survey. While there was some overlap in these groups, certain people were interviewed but did not participate in the survey and vice versa. As stated in the SNA article, "evaluators usually cannot assess a large network by surveying small randomized samples in the same way that they can with traditional non-network surveys." Again, if the community had been more involved in and aware of the process from the beginning it might have been easier to get "buy-in" from a core group of perhaps 30 individuals that could have participated in interviews, survey and follow-up.

It still would have been a relatively small group within the scope of the whole community, but at least we would have had more consistency throughout the process.

Learning from the Survey Data

Interesting data was generated through the survey process. For example, many of the practices that the community was most interested in learning about (e.g. community currency, creative grassroots fundraising, rainwater harvesting, solar energy and cob /straw bale building) were areas where few people said they had something to offer. This indicates that these are areas where the Exchange might look to outside resources for advice, support and learning. Conversely, many of the practices that the most people said they had something to offer were less popular on the learning side (e.g. hosting dialogues, alternative education, sustaining community engagement and Open Space). This might mean that we, as a community, have significant knowledge and valuable offerings in these fields. There is only one practice, healthy cooking, which appears in the top ten of both lists. This could indicate that we already have a wealth of knowledge in this practice, *and* a strong desire to learn and share further. I received a few responses from the community after sharing the results of the survey and inviting feedback. Interestingly, the individuals who wrote back were seeking *my* advice on where to get resources about solar energy and green building, as opposed to contacting directly those who said they had something to offer in these practices.

Although I was able to distinguish some of the more popular “want to learn” practices from the network map, I was not able to distill much learning from the relationship between the participants (red circles) and the practices (blue squares) in the network map. The blue squares all seem to be of relatively similar dimensions, which may be due to the survey’s small sample size or to the fact that some participants claimed they were interested in every single practice. In many cases there were 10 – 15 practices that were of learning/offering interest to exactly the same number of people, so ranking their true popularity was difficult.

Learning from the Action Groups

The idea of identifying the practices from the survey that were related to each of the Action Groups arose after we returned from Zimbabwe. In this case, SNA tools could have been quite useful in creating simpler maps to demonstrate the resources available to the different groups. This might have been where concepts like “bridgers” and “hubs” became relevant for the community – indicating people who had knowledge to offer in a number of diverse practices, or people who were particularly knowledgeable in practices associated with one specific Action Group. If participants had been responsible for naming the different practices that they felt were connected to their Action Group and the kind of resources they wanted to invite in, there might have been more of a forum for sharing the data. This would have allowed us to make more accurate and useful maps of those who said that they had something to offer in a practice that would benefit the Action Group. It also seems important for SNA maps of this type to have a narrative aspect, so that in addition to the visual representation there is a qualitative record of what the community says about what they want to learn and why.

The Action Groups, while powerful while we were together, have not actually demonstrated a lot of traction in the six months since the gathering. From the interviews we identified some of the conditions which led to greater or lesser success with this model (see below).

Learning from the Interviews

Probably the richest learnings from this process have emerged from the post-AoLC interviews that we conducted. Themes that interviewers noticed around the value of participation in the AoLC included:

- **Identity:** “The most important thing that happens when people gather trans-local is that they come away with a deeper sense and learning around their own identity.”
- **Belonging:** “It’s about understanding self through seeing oneself connected in community, mirrored in community.”
- **Deep Friendship:** “The value is being able to share a much deeper sense of oneself, offering oneself more fully and seeing others from a different perspective. It’s a heart-filled friendship.”

We learned about the conditions that made Action Groups more likely to succeed. The first was that if one already had something in place (a program, a learning exchange, a meeting) before coming to the AoLC, it was more likely that collaboration and follow-up occurred. If the next steps are clear and each person knows exactly what he or she, personally, has to do once home there is a much better chance that action will happen. If there’s a general idea of what’s wanted, but a lack of understanding about what each person has to do to make it happen, the chances that plans will be carried out are reduced. Naming the structures for fulfillment helped participants feel like they had some tools and next steps, but in many cases they were not sufficiently detailed to result in collective action.

The learning we gained around why collective action was or was not occurring was interesting. For many people, it is simply that they are too busy in their day-to-day lives to be thinking of the trans-local community on a regular basis. For others, they returned home without having a sense of their clear next steps and commitments faded. Finally, if the work participants did in Action Groups at the AoLC is not immediately relevant to their work at home it is less likely that they continue engaging trans-locally. Another issue is the inordinate amount of change, chaos, and disruption that all of us have experienced in the last six months. For many Exchange members, global crises of all kinds have affected their capacity to stay connected.

We made an assumption at the beginning of the interview process that if people were acting on the commitments that they made while we were together, it was a sign of community health. During the reflection on the interviews, we noted that this may not have been the right unit of measure. One interviewer commented:

If I’m just looking at the actions, I think: no, people haven’t really done what they said what they were going to do. But when I look at the relationships in this community and the way people are interacting with each other and the way that they feel this deep closeness, I think: HELL YES this is a healthy community! So, these are the things that I think might be the indicators of health in the community:

- Continuing to act on shared purpose
- Belonging

These are themes that cut across all interviews. There’s a health in that and resilience in that, so are we using the right measures for health?

This leads me to wonder, if these are the things we actually want to measure, could Social Network Analysis be useful to measure belonging, friendship, shared purpose and intimacy? How?

I found one interviewee's response to the question around the value of individual participation insightful. She said, "This question makes me notice how we want to tangibly name and write down what it was that we learned, which makes me laugh a little because it's not just about the tangible things . . . it's also about the chemistry – the alchemy of what happens to us when we're together."

What I realized at the end of the post-AoLC interviews, was that we really hadn't integrated the tools for Social Network Analysis into our evaluation process. In the end, we used a pretty traditional and comfortable manner of reflecting and learning.

Conditions for Success

Community Participation

It is abundantly clear that in order for a learning community to benefit from this type of information, they have to design the evaluation and decide collectively what it is they want to know. Without this, the challenge that will continually rear its head is how to transform the information into useful knowledge or wisdom.

Continuous Thread of Inquiry

Throughout this process I felt that we frequently changed our course of direction around what it was that we wanted to know. This may have been due, in part, to the fact that we did not have full community participation; we kept altering the question in an attempt to make the inquiry relevant and useful. This does not mean that one should strictly follow a pre-designed course of action in this type of evaluation. Particularly when working with emergent networks one must be prepared to be as flexible and resilient as the community itself.

Community Maturity and True Self-Organization

A certain degree of maturity and self-organizing in a collective leadership network are attributes which may need to be present for this type of evaluation process to be beneficial. While the Exchange has now been around for more than five years, it may require more time for communities of this type to evolve to a point where they are engaging in collective action and evaluation around the benefits of participation.

The other significant factor in the case of the Berkana Exchange is that we underwent major transitions both during the AoLC gathering and in the ensuing six months. The Exchange itself and The Berkana Institute's relationship to the community are currently in the midst of radical shifts. This is a significant factor in our appraisal of the outcomes of these experiments. Once the Exchange has actually transitioned into being a fully self-organizing, trans-local community without a central body catalyzing and coordinating activities it may be more likely that participants will find value in these tools.

Keep it Simple

Network mapping seems like a powerful tool when the images can be analyzed, understood and utilized as a foundation to build further learning by a collective, emergent community. But without some sort of narrative or forum in which to illuminate the nature of the relationships

(lines between entities) the maps could be seen as very complex. Particularly for participants that are engaged in more practical, hands-on experiments in community resilience and leadership it is important for the inquiry be easily understood by a diverse group of people and simple to share with others. We did not share network maps with the community because we were not sure of how to demonstrate their value or use.

Questions for Further Inquiry

A question that might be interesting to explore further is: what does *qualitative* social network analysis look like? How might we track the kinds of conversations or relationships that are emerging in a community like the Exchange? For instance, what would it look like if we looked at the interview transcripts and mapped the number of times that a particular person was mentioned by an interviewee, but also recorded the story of how that learning occurred and/or the context of the conversation? How could we share the story of one participant from the AoLC gathering travelling thousands of miles, months after the gathering to be the midwife for a fellow participant? How can the tools of SNA illuminate powerful stories like this?

Another, related question that I still hold is around using these types of tools to inspire action. Many people who are deeply engaged in this community already have a sense of the bridgers and hubs, without looking at a network map. There's a certain degree of shared understanding in the Exchange that doesn't need illuminating. Rather than just raising awareness about what a community looks like, could SNA tools be used to really inspire and support collective action in the community?

Finally, there remains a burning question for me around how to demonstrate that participation in a network or community that is self-organizing and decentralized, but founded on shared principles and beliefs, has an impact on local communities and systemic change. I am open to the possibility that SNA tools could be useful in demonstrating the impacts, yet I still have some doubts about demonstrating causality (i.e. how do we prove that participation in *this* community led to *this* set of changes?) With a certain degree of rigor and a common understanding of the evaluation process, we can begin to test theories like emergence and systemic transformation. As Berkana begins to dive into some of these questions with more regional and practice-based communities, I am curious to know how SNA tools might be useful to these groups in the future.